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Fractured Selves: Identity Crisis and Alienation in Jaishree Misra's *Ancient Promises*

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Abstract—This paper aims to analyze the connections between identity crisis and alienation in Jaishree Misra's *Ancient Promises*. It is an autobiographical novel, where the author narrates the life of the protagonist, Janaki. The literary theories utilized for this analysis are feminism, postcolonial theory, and psychoanalytical theory. This paper aims to highlight the underlying connection between Janaki's struggle and her identity crisis. Further, the paper discusses how her identity is shattered due to the suppression and oppression faced by her in the family, marriage, and the society. Through the readings of the theorists Julia Kristeva, Gayatri Chakravorty Spivak, and Homi K. Bhabha, it was analyzed that Janaki's trauma, social alienation, and feelings of dislocation are a result of her oppressed gendered body and an experience of cultural loss. By applying the theory of Kristeva's abjection, it was revealed that Janaki's abjection and feelings of ambivalence are responsible for the identity crisis. Through the use of the theory of the subaltern by Spivak, it was shown how Janaki's early silence is caused by the patriarchy in her society. Bhabha's concept of hybridity shows the ambiguity of Janaki's experience of diaspora in England. It can be concluded that although the struggle for Janaki's identity was not as loud as the writers who do not oppose the structures that oppress them, her voice of agency becomes a form of strength and resistance.

Index Terms—identity crisis, alienation, postcolonialism, psychological trauma, patriarchal oppression

I. INTRODUCTION: THE BURDEN OF BELONGING AND THE FRACTURED SELF

The contemporary Indian English literary scene includes Jaishree Misra's *Ancient Promises* as a moving story about female identity that navigates through traditional cultural demands and modern ambitions while showcasing emotional strength. The novel, which appeared in 2000 combines autobiographical elements to tell the story of Janaki or Janu, a young Malayali woman who fights for self-identity and freedom while living in a traditional patriarchal society. The first-person narrative provides a deeply introspective view of the protagonist's evolution from adolescence to adulthood while transitioning from submission to subtle defiance and ultimately reclaiming selfhood after experiencing alienation (Vimal & Pillai, 2024).

Readers find *Ancient Promises* compelling because it weaves a personal narrative with social commentary. Janu faces conflicting cultural expectations regarding womanhood and duty as she moves between Kerala, Delhi, and London. The protagonist faces a continuous identity crisis because she has no control over her emotions while also lacking her own personal voice. Her journey demonstrates a crisis of being which Erik Erikson defines as identity formation struggles between roles, expectations and self-definition (Erikson, 1968). Janu's identity crisis differs from Erikson's Western model because she faces added challenges from collective history as well as gender expectations and cultural remembrance which make her alienation both psychological and sociocultural.

Janu faces early-life alienation when she experiences sudden separation from Arjun because of caste and community pressures. The Nair family insists on traditional values and social status, which makes them arrange for her marriage to Suresh, a wealthy businessman from Kerala. Her emotional stability first takes a hit from both her separation from her youthful romance and her move to an unknown city. She tries to fulfil her duties as a wife yet her marriage confines her in a loveless relationship where her needs remain neglected, while her presence stays insignificant. Her existence within Suresh's household deepens her silence under her mother-in-law's watchful eye which strengthens the cultural demands for women's obedience and emotional self-denial.

Through multiple theoretical approaches this research examines the relationship between identity crisis and alienation in the literary work *Ancient Promises*. The analysis of Janaki's identity formation through patriarchal observation benefits from the feminist perspectives of thinkers like Simone de Beauvoir and Julia Kristeva. In *The Second Sex*, Beauvoir argues that women develop their identity through social construction, which cultivates passivity and sacrifice as central tenets of femininity (Beauvoir, 1949). Janaki's development throughout her life illustrates her transformation into womanhood through her upbringing, her coerced marriage and subsequent difficulties with motherhood and self-determination which resulted in the loss of personal liberty and complete emotional well-being.

Janaki's experience demonstrates Homi K. Bhabha's idea of "unhomeliness" from a postcolonial perspective because her cultural displacement alongside hybrid identities creates a dual crisis regarding her sense of place and identity. Janaki

traverses social and geographic spaces between Kerala, Delhi and the UK, which expose her to distinct sets of societal expectations despite not being a conventional postcolonial migrant. According to Bhabha the condition of unhomeliness emerges when "the boundaries between home and the outside world blur," resulting in a disrupted and divided sense of identity (Bhabha, 1994). Janaki's feeling of being unhomed starts inside her marital house yet spreads through her global journeys showing how her sense of identity faces disruption through both close proximity and physical distance.

The narrative structure of the novel strengthens the characters' psychological and emotional detachment. Janaki spent her formative years in Delhi as a compliant daughter in a traditional Nair family where others dictated her decisions. When Janaki unexpectedly marries Suresh she enters an oppressive relationship that strips her of her voice and prevents her from finding companionship and emotional satisfaction. Her efforts to meet societal expectations result in growing isolation and hopelessness while she manages to care for her differently abled daughter Riya without any help from her family or spouse. Moving to Delhi increases Janaki's sense of alienation because her family limits her freedom of movement while denying her personal wishes.

The narrative makes alienation a dominant theme through Janaki's psychological isolation and her emotional detachment from her nearest relationships. The combination of her silent struggle in an unfulfilling marriage and her inability to care for her disabled daughter Riya alongside her cultural displacement in Western society indicates a profound existential crisis. Within *Ancient Promises*, alienation reflects Karl Marx's theory of being separated from one's true nature through oppressive forces except here these forces are family, culture, and gender-based instead of economic.

Julia Kristeva's notion of the "abject" represents elements that society excludes or suppresses during identity development. In "Powers of Horror" (1980) Kristeva defines the abject as that which disrupts identity structures as well as systems and orders because it operates outside established boundaries and rules. Janaki's personal desires along with her emotional requirements and romantic aspirations become unacceptable so that social stability and family reputation can be maintained. The expectation exists for her to stay within accepted womanhood boundaries as a dutiful wife and obedient daughter while sacrificing herself as a mother although these roles damage her identity.

Janaki's narrative stands as a testament of resilience rather than total defeat. Janaki demonstrates agency when she revives her relationship with Arjun and chooses to pursue higher education in England over her existing marriage. These pivotal moments question traditional female sacrifice narratives by showcasing a woman's journey toward achieving personal and intellectual independence. Her relocation to London becomes a pivotal moment when she learns to defend her legal and maternal rights while fighting for her daughter's custody and reestablishing her narrative voice despite facing numerous obstacles. Her UK education and independent lifestyle enable her to rebuild her fragmented identity and author her own life story.

Ancient Promises stands out as a powerful text because it depicts Janaki's alienation as a process of slow retreat with intermittent episodes of insight and defiance rather than brave rebellion. Instead of leaving her marriage angrily or dramatically refusing her responsibilities, she takes considered actions by relocating to England and pursuing custody battles and writing her story as expressions of self-empowerment. Gayatri Chakravorty Spivak's concept of "strategic essentialism" describes this pathway as the temporary creation of a unified identity by the subaltern woman which enables her to achieve agency and voice (Spivak, 1988). Janaki remains silenced throughout most of the novel but eventually finds her voice through the narrative which turns her story into an empowering act of reclamation.

The novel functions as both a product of female self-expression and a platform for examining identity politics and the experience of alienation. The personal elements of *Ancient Promises* demonstrate political significance through gender issues as well as language dynamics and geographical and memory-related themes. The act of writing functions as a survival tool and a form of resistance that aligns with feminist demands to reintegrate female subjectivity into literary spaces. By using storytelling as her final act Janaki establishes her selfhood while disrupting the patriarchal narrative that previously dictated her existence. *Ancient Promises* extends beyond personal endurance to become a multifaceted examination of identity reconstruction within the interplay between personal experiences and political forces.

II. FAMILIAL EXPECTATIONS AND THE LOSS OF SUBJECTIVITY

Janaki's identity crisis develops from her early experiences growing up in the societal framework of a Malayali upper-middle-class family. As a child Janaki internalizes strict norms of behavior which enforce silence and submission to create what society sees as the perfect woman. While many view the family as a place of emotional closeness, it functions as a disciplinary body that upholds patriarchal standards and restricts personal subjectivity development. The insights that Simone de Beauvoir presents in *The Second Sex* prove especially revealing in this context. According to her analysis society presents marriage as the traditional destiny for women and defines their life through their connection to a man. A patriarchal system determines Janaki's identity before she even has the chance to make her own choices while rendering her desires insignificant.

The narrative initially defines Janaki as a daughter who abides by expectations from the start. The period Janaki spent exploring personal freedom during her schooldays in Delhi through her developing relationship with Arjun represents a threat to her family's cultural values rather than an opportunity for self-discovery. Her family in Kerala sees her formative emotional connection as crossing established cultural boundaries. The family stops her independence by forcing her into marriage with Suresh whom they selected because he shares their traditional beliefs. This act goes beyond forcing a marriage because it eliminates Janaki's emotional identity. The family operates as an ideological system that suppresses

opposition and destroys developing individuality. Spivak's epistemic violence theory applies to this situation because she maintains that women in colonial and postcolonial settings are frequently represented by others instead of being permitted to express themselves. Janaki's personal choices become secondary to a family-determined narrative which enforces cultural traditions and collective honor.

Psychological violence persists when Janaki begins her new life in her marital home. The Marar household fails to offer emotional stability or belonging but instead becomes a place where cultural displacement occurs and identities disappear. The new family dictates Janaki's life through their established rules of behavior and prohibitions. The family immediately labels her an outsider because she grew up in Delhi and demands that she follow their cultural expectations. The mother-in-law assumes the role of an oppressor by implementing various controlling measures that attempt to mold Janaki's self into the family's strict cultural framework.

Her transformation starts symbolically during her wedding reception when her individuality is forcefully altered to fit her in-laws' expectations. As Janaki narrates:

I was helped by Sathi and an aunty in looking like someone else. A plait of hair had been bought ... and was firmly attached to my shoulder-length Delhi tresses. A thick layer of eye liner was painted around my lashes ... By the time I had worn Sathi's jewellery and the brand new Kanjeevaram sari that had been for me, I was somebody else. (Misra, 2000, p. 92)

The event represents more than an alteration of clothing but signifies an enforced entry into a performative feminine existence dictated by others. The fake hair along with heavy eyeliner and foreign jewelry represents the start of a life dedicated to seeking external validation. Her original self has been completely replaced by an artificial identity. This performative transformation demonstrates Judith Butler's concept of gender which is constructed through the performance of repeated social actions. Janaki is pushed into a false identity that matches traditional Marar ideals of womanhood. From the start her compliance becomes a requirement which signals her initial step towards becoming erased as an autonomous individual.

Through Julia Kristeva's framework of the abject one finds an insightful way to interpret this transformation. Kristeva in "Powers of Horror" defines abjection as elements which disrupt identity and systems and must be rejected to maintain societal symbolic structures (Kristeva, 1982). In her new household Janaki transforms into an abject figure following her marriage. The stability of the household deems her emotions and desires as threats which require suppression of her personal identity. The household requires her to fulfill family obligations but expects her emotional experiences to stay concealed. The structure of the family requires her disappearance even though it depends on her emotional and physical contributions.

Marriage fails to deliver emotional stability or a sense of belonging for Janaki. Her marriage initiates a profound separation from her own psychological and emotional well-being. The theory of abjection formulated by Julia Kristeva provides an insightful perspective for analyzing this transformation. Kristeva defines abjection in "Powers of Horror" as elements that disrupt identity and order which society must reject to maintain its symbolic framework (Kristeva, 1982). After her marriage Janaki takes on the role of an abject presence in her new family. The family unit perceives her feelings and personal identity as threats to domestic stability which necessitates their suppression. Her existence fulfills essential family functions but her private thoughts must stay concealed and unexpressed. The household's symbolic code requires her disappearance while depending on her physical and emotional work.

Janaki finds herself trapped within her marriage instead of experiencing companionship. Suresh her husband does not engage emotionally and shows scant interest in her mental or emotional experiences. Her in-laws maintain continuous oversight of her actions which strengthens their expectation that she must stay quiet and obedient. For Janaki the home transforms from a place of closeness into an environment of scrutiny and control. Whenever Janaki tries to establish emotional bonds or express discontent she encounters apathetic reactions or gentle reprimands which deepen her internalized feelings of inadequacy. Within marriage exists an emotional void that Betty Friedan identified as "the problem that has no name," which describes the silent despair women endure from domestic demands and emotional neglect (Friedan, 1963). Janaki's distress extends beyond her individual misery to represent a broader silencing of her emotional and intellectual needs by systemic forces.

Janaki's inability to express her trauma demonstrates the unavoidable nature of this silencing. Her reality becomes trapped by inexpressibility because language fails to represent her experience. The analysis of Luce Irigaray about the male-centered power structure becomes significant in this context. Irigaray explains in "This Sex Which Is Not One" how language's symbolic system excludes female desire by structuring itself to invalidate it. According to her argument women experience multiple identities which patriarchy simplifies into a single reductive form (Irigaray, 1977). Janaki's inner voice resists societal demands for a single identity but cannot find a family or social environment where she can express it meaningfully. Her internal world becomes distinct from the external roles society demands from her.

Janaki's emotional and psychological collapse transforms her into a ghostly presence living in her matrimonial home. She exists as a ghost in her own life because she appears only through her obedience while remaining detached from authentic involvement with her personal aspirations. The struggle between her responsibilities to her family and her own desires creates fractures in her sense of self. The process becomes clearer through Louis Althusser's interpellation concept which defines how ideological structures like the family summon individuals into predefined roles (Althusser, 1971).

Through her performance of daughter-in-law, wife, and mother roles Janaki becomes interpellated into these positions which causes her to give up her genuine self.

Yet, this erasure is not absolute. Janaki maintains memories and emotions and holds aspirations that remain uncontained during her marriage's quietest moments. Despite her inner world being suppressed Janaki's memories and narrative creation enable its active reconstruction. The concealed nucleus of resistance demonstrates that identity endures beyond its fragmented and estranged state. Though family and marital institutions try to define her identity Janaki uses her developing self-awareness to break free from these limitations which sets the stage for her subsequent rebellious actions.

Janaki experiences deep alienation because her family expects her to uphold their honor while she faces strict gender norms as a young woman in a traditional environment. Her ability to make important life choices remains restricted by others who decide whom she marries and where she lives along with how she raises her daughter Riya. The legal and societal barriers which prevent her from shielding her daughter amplify Janaki's sense of loss and helplessness. Her return to Delhi that emerges later in the story together with her quest for higher education and her final attempt to regain custody of Riya stems from this early experience of family domination.

The narrative shows Janaki evolving from her role as a daughter into an existence that no longer fits within her personal life. Janaki experiences emotional and symbolic alienation at psychological levels that stem from family demands to erase her ability to speak and feel. The home that ought to represent a place of belonging instead transforms into a space of alienation. The family imposes silence on her voice while dismissing her desires and reshaping her identity to support family honor and social norms. Throughout the narrative development these internal struggles emerge through minor yet impactful resistant behaviors which indicate a potential for self-reclamation outside patriarchal domestic boundaries.

III. MARITAL ALIENATION AND THE FAILURE OF INTIMACY

Following her marriage Janaki experiences increased emotional and psychological isolation which builds upon the silencing she underwent in her birth family. Janaki's entry into the Marar family preserves patriarchal authority within their wealthy Malayali household through the institution of marriage which society recognizes as acceptable. Though Janaki married Suresh without fully agreeing to it herself the actual experience of being his wife causes her to become more estranged from who she really is. What could have been an environment for emotional intimacy and shared life transforms into a sophisticated mechanism for control.

Suresh never becomes physically violent or displays obvious abusive behavior toward his wife. His lack of emotional connection, combined with passive disinterest creates a subtle yet effective abandonment. He seldom demonstrates any interest in understanding Janaki's thoughts and aspirations or exploring her emotions. The breakdown of emotional intimacy emerges as one of the subtlest ways to create alienation. Janaki loses her own identity as she performs femininity through obedience and silence while functioning domestically for the Marar family as both wife and daughter-in-law.

The Marar household stands as an example of "controlled respectability" because the family maintains its social prestige and cultural sophistication through an implicit rule of silence, conformity and suppression of emotions. Janaki faces persistent evaluation from her mother-in-law and relatives based not on her personal identity but solely on her ability to meet their pre-established standards. The birth of her daughter Riya does nothing to alleviate Janaki's emotional austerity. Society reduces her existence to the mere roles of wife and mother while completely ignoring her individual thoughts and intellectual desires. When Janaki feels sad or resists she faces rejection because others view her behavior as childish or as betrayal.

Janaki's suffering at the Marar home remains non-dramatic and free from violent displays. A lack of attention leads to this emotional pain which is intensified by the continuous rejection of emotional share and deeper human bonds. Her own life becomes a silent shadow where she exists without voice. Janaki functions as a ritual performer and domestic order facilitator who passes on lineage yet lacks recognition as a sentient being with thoughts and emotions. People misunderstand her silence while her words consistently lack significance. Her desires and personal identity remain unexplored because she receives no questions about them. Her existence becomes dependent upon external expectations that dictate how she should be.

The situation described correlates with Jean-Paul Sartre's existential theory of being-for-others because the self emerges through external perceptions that define and limit it (Sartre, 2003). Within the Marar family Janaki remains known solely as a daughter-in-law, a mother, and a wife while her individual identity remains unrecognized. Her emotional and psychological reality is denied. A totalizing expectation of compliance rather than violence enforces her silence. Janaki's life now revolves around duty instead of desire while coexistence stands in place of genuine connection.

Janaki's marriage displays a profound emotional emptiness that reflects broader patriarchal systems which normalize male emotional distance while making women responsible for carrying emotional tasks. Suresh's failure represents both his own personal shortcomings and a wider systemic issue of failing to acknowledge women as emotional entities. His refusal to engage emotionally represents a thousand denials—of love and understanding as well as observation and connection. He becomes the very symbol of marital alienation: This spouse exists in the physical space while lacking emotional connection.

Nancy Chodorow's feminist psychoanalytic theories reveal that domestic settings reinforce gender roles which leave women isolated on an emotional level. The writings of Nancy Chodorow indicate that women become accustomed to

self-sacrificing behaviors through their experiences in motherhood and marital relationships (Chodorow, 1978). Janaki's value within the Marar family depends entirely upon her adherence to prescribed domestic roles. Family surveillance and control limit her emotional relationship with her daughter Riya. The scrutiny she faces toward her maternal behaviors turns her into a practical entity instead of allowing her emotional independence.

Janaki experiences intensified alienation due to her displacement from her cultural roots. Her experiences growing up in Delhi have deeply influenced her worldview, language ability and self-awareness despite her Malayali heritage. Her Kerala marriage homecoming becomes a forced cultural exile rather than a heartfelt return. The unspoken behavioral codes along with linguistic barriers and rigid customs of her new setting create challenges for her. Her sense of unbelonging intensifies because of the Marar family's strict cultural norms. Her ability to speak two languages coupled with her contemporary views and emotional transparency encounters skepticism and even contempt. She experiences cultural exclusion in the place that should represent her own home.

Janaki's crisis is rooted in this double dislocation: Janaki encountered alienation first through a natal family who taught her silence and then through a marital family which required her to disappear. Janaki's identity in both her parental home and marital home depends on her ability to conform to pre-established gender roles rather than her actual self. The extended experience of alienation creates devastating psychological damage. Her sense of self slowly disappears as she constantly conforms to imposed standards.

Yet, *Ancient Promises* also gestures toward resistance. Janaki's alienation is profound, but not total. Janaki preserves her internal world which holds memories, reflective thoughts and postponed wishes. Her unwritten letters to Arjun and acts of quiet rebellion alongside her undying love for Riya demonstrate her enduring self despite suffering damage. Each small act of inner resilience becomes a seed that will eventually grow into transformation. Janaki's departure from the Marar home represents a culmination of her journey towards reclaiming her suppressed identity.

Ancient Promises examines how patriarchal family systems impose emotional burdens while enforcing silence becomes a form of quiet brutality through Janaki's story. The text demonstrates that domestic spaces can erase individuality while marriages lacking mutual recognition exacerbate feelings of isolation. Through Janaki's experience we learn that oppression exists beyond physical violence. This type of oppression presents itself through detached caregiving, impersonal presence, and obligatory actions that lack love. The human spirit keeps its power to resist and remember throughout silence before finding a way to speak.

IV. JANAKI'S ASSERTION OF IDENTITY

In Jaishree Misra's *Ancient Promises* Janaki's transformation follows a strong feminist narrative arc that progresses from enforced silence into conscious self-expression. The story follows her transformation from a girl trapped by upper-middle-class Malayali domestic expectations into a woman who masters her personal destiny. This development represents both an individual transformation and a powerful critique of societal structures such as family, marriage, and patriarchy which aim to limit female independence. Misra offers a layered emotional study of feminine identity formation and reclamation through cycles of shaping and erosion. Through stages of sorrow and resistance Janaki achieves reconstitution which serves as an emblematic representation of numerous women who fight to establish their identity against a world that tries to dictate their existence.

The novel opens with Janaki depicted as both emotionally alienated and intellectually suppressed. The arranged marriage to Suresh which her family sanctioned as a respectable union represents the initial major attempt to silence her personal voice. Society presents marriage as women's ultimate achievement but Janaki experiences its hidden oppressive dynamics through her life in the Marar household. Janaki's existence as a wife demands nothing more than silent obedience. Janaki experiences no emotional closeness with Suresh while her personal needs and opinions remain unseen and ignored. The Marar family follows strict patriarchal standards to maintain control over all aspects of her existence which eliminates her independence and forces her into a passive life role.

Janaki's early existence mirrors the societal patriarchal teachings that tell women suffering is an expected part of life. The way she initially tolerates emotional neglect and social limitations demonstrates how internalized patriarchal values can mask awareness of unfair treatment. The narrative takes a new direction when Janaki starts to doubt the validity of her suffering. The subtle yet profound awakening marks a transformative shift in consciousness which reflects feminist theory's idea of making personal experiences political. When Janaki understands that her distress stems from systemic oppression rather than individual failure she starts analyzing her life with a critical perspective.

The practice of re-framing Janaki's life experiences mirrors Paulo Freire's idea of conscientização which he details in "Pedagogy of the Oppressed." According to Freire true liberation occurs when oppressed people understand oppressive systems through intellectual engagement (Freire, 2000). The moment when Janaki re-engages with education becomes crucial to the storyline. After facing barriers to her educational pursuits, she starts to view education as a path to freedom beyond just securing a job. Her choice to persist with her studies stands as a radical expression of self-empowerment against family opposition and logistical obstacles. Education, here, is more than institutional. Her journey of education represents her intellectual and emotional rebirth.

Janaki discovers a unique opportunity for liberation while attending university. At this place she finds her way back to language and literature while rediscovering her own identity. Janaki's pursuit of learning enables her to regain her ability to think independently as well as to experience emotions fully and express herself freely. Within the university Janaki

discovers a place of resistance which enables her subjectivity to develop beyond the roles imposed upon her. Through literature Janaki discovers new ways to understand her existence and express her inner world which she was previously unable to reveal. The new space stands as an opposition to the silence imposed on her during her marriage as she starts to evolve into someone who thinks, feels, and speaks.

Janaki uses her memory as a crucial tool in reclaiming her identity. At first Janaki remembers Arjun with feelings of loss and longing but later transforms his memory into a symbolic act of resistance. Arjun embodies the period when Janaki possessed both self-determination and genuine emotional awareness. The painful memory of their relationship serves as a connection to her earlier self who knew freedom and serves as evidence that she was once able to love and make choices. Recalling these memories constitutes more than looking back with nostalgia because it represents a powerful reclaiming of her own historical narrative. Janaki restores her identity from her past memories which were lost or hidden by her responsibilities as wife and daughter-in-law.

The theory of identity performance proposed by Judith Butler finds a strong parallel in Janaki's journey towards self-reclamation because it describes identity as non-static and dependent on continuous performative acts (Butler, 1990). Janaki does not rediscover an original or truthful identity but instead creates a new sense of self through acts of resistance and reflection alongside repeated behaviors. Through her acts of rejecting conformity along with her dedication to learning and defending her daughter she reconstructs her identity. She is not simply regaining her previous self but rather she is actively shaping her new identity.

Janaki's motherhood identity expands through her relationship with her developmentally challenged daughter Riya while she faces patriarchal oppression. The Marar family punishes Janaki through patriarchal revenge by keeping Riya away from her after Janaki departs from their home. The institution of motherhood which society idealizes as a natural and unconditional duty becomes a tool of punishment and shame for a woman who decides to end her marriage. Janaki fights for Riya's custody through ongoing legal and emotional challenges which symbolize her defiance of the punishment she faces. By standing up for her daughter she defends her maternal rights while also protecting her personal dignity and ensuring her voice and place in the world remain secure. The maternal bond transforms into a wellspring of profound emotional strength and moral clarity rather than serving as a limitation.

Her return to Delhi represents an intentional move to enter a space where she gains control to tell her own story. Janaki starts her writing journey here which transforms into her most powerful expression of self and resistance. "Through its narrative structure *Ancient Promises* transforms into a metafictional work. The existence of Janaki's story within the novel reflects how the novel itself becomes her story. Her decision to narrate her personal history allows her to gain control over her experiences through which she transforms trauma into testimony. According to poststructuralist thought Michel Foucault proposed that power and knowledge interact so those who control language to define their reality can transform that reality (Foucault, 1980). Janaki's self-knowledge becomes her power. Her narrative becomes a space of liberation.

Hélène Cixous calls for women to inscribe their physical and personal experiences into historical records as a way to oppose the silence enforced upon them by patriarchal systems (Cixous, 1976). Through her writing Janaki performs an act of resistance against historical erasure. The combination of pain and loss with hope and courage gives her voice the power to create an entirely new space for defining herself radically. She maintains the legitimacy of her struggle through the power of her voice despite lacking a full resolution. She acknowledges her resilience amid adversity while asserting her entitlement to express herself and to make her own decisions. The act of her narrative control stands as the strongest opposition to those systems which tried to erase her voice.

The novel's conclusion reveals that Janaki does not achieve conventional triumph. Janaki faces an uncertain future while her past wounds persist. However, her position has irrevocably changed. She has decided to exist autonomously without waiting for external approval. She has moved away from fulfilling others' expectations to taking control of her own life. Janaki's final condition is accurately represented by Stuart Hall's idea that identity remains ever-changing and unending (Hall, 1990). Janaki remains a dynamic work in progress that embodies open-ended growth along with reflective awareness and assertiveness.

The novel concludes with a gesture that embodies both quiet dignity and deep strength. Janaki's evolution diverges from traditional story resolutions yet provides profound affirmation. She now controls her life narrative which was previously dictated by others. Her sense of alienation serves as the foundational ground for developing her identity. Her crisis, once immobilizing, becomes her curriculum. Janaki regains control of her life when she finds her voice again. *Ancient Promises* stands as both a narrative about personal struggle and a feminist work that redefines a woman's self-discovery process in opposition to the forces seeking to dismantle her.

V. CONCLUSION

In *Ancient Promises*, Jaishree Misra illustrates how individual identity undergoes transformation through socio-cultural and familial frameworks as well as emotional pressures. The narrative of Janaki extends beyond the confines of an arranged marriage story and transcends simple critiques of traditional domestic roles. The text serves as an intricate study of identity reconstruction which occurs through the interaction of resistance and alienation. Her journey reveals that identity is not a static entity but an ongoing negotiation influenced by power dynamics alongside memory and desire.

The novel fundamentally examines the various strategies patriarchal systems use to suppress and remove women's expressions. The alienation Janaki experiences develops through repeated silences and erasures combined with numerous small daily humiliations rather than a single event. The everyday traumas found within family institutions and the expectations of marriage and motherhood create a widespread cultural system that blocks women from expressing their personal thoughts. Tradition and duty impose an inescapable burden that determines her life while making her a passive vessel for other people's choices. The narrative demonstrates that personal identity survives within the novel's restrictive frameworks.

The first-person storytelling in *Ancient Promises* enables Janaki to repossess her narrative. Narration serves as a vehicle for resistance through which she disrupts the enforced silence from her past experiences. She transforms her previously silenced voice into a place for healing and rebuilding. According to Hélène Cixous' concept of *écriture féminine*, women should create their existence through writing and express their bodily truths and personal histories in their unique language (Cixous, 1976). When Janaki chooses to tell her life story she performs a feminist act to take back her narrative. Through reinterpretation of her past experiences she gains insight from her suffering.

The book's analysis of identity becomes deeper through its depiction of cultural mixing and displacement. Janaki exists between two distinct cultural worlds as she moves between Delhi and Kerala with each place shaping her sense of self in unique ways. The story does not treat this cultural duality as mere confusion but instead examines how various cultural ties can exist simultaneously within one person despite their ongoing tension. Stuart Hall's theory that identity develops through continuous transformation rather than fixed states becomes evident in this context (Hall, 1990). Instead of reviving a fundamental or primal identity Janaki builds a fresh identity by combining her memory with her education and experiences in motherhood and storytelling. Her final identity represents a revised creation instead of a rediscovery.

Feminist literary theorists have traditionally highlighted the need to reconsider domestic spaces as areas where both suppression and defiance can occur. The experiences of her life show how domestic spaces serve as both refuge and confinement while motherhood simultaneously roots and separates a person and marriage hides intimacy instead of building it. Janaki discovers her motivation to resist within the core of these contradictions. She rejects the complete definition of her roles and steadily asserts her right to self-identify.

Ancient Promises separates itself from other female emancipation stories through its portrayal of liberation as neither total nor simple. Janaki's transformation is partial, painful, and ongoing. Her past wounds persist while her daughter's future continues to raise unanswered questions. The choices she makes through speaking and writing bring about such deep transformation that they rearrange the fundamental aspects of her existence. Instead of pursuing a triumphant conclusion the novel emphasizes the importance of process and struggle and the power of voice. The journey to liberation typically involves gradual self-reconstruction rather than sudden dramatic events.

Through Janaki's voice as the narrative's core element Jaishree Misra tells one woman's story while simultaneously pointing to many other untold stories that remain silent. The novel represents a venue where personal experiences and political dimensions unite and transform private moments into acts of revolution. Through this work readers experience Janaki's endurance alongside her happiness recovery and her relentless demand for recognition. *Ancient Promises* becomes part of the expanding collection of Indian women's literature that questions mainstream stories and creates opportunities for innovative literary and cultural perspectives.

Janaki's identity crisis demonstrates a social disease rather than personal weakness because society imposes rigid female roles that fail to recognize their multidimensional nature. Despite emotional neglect and silencing causing her alienation and displacement Janaki discovers within these circumstances the potential for self-invention instead of despair. Her choices to go back to Delhi for education and fight legally for her daughter demonstrate quiet yet radical rebellion that transforms her life boundaries. Her decision to initiate legal separation from Suresh despite facing enormous social stigma and personal sacrifice marks her reclaiming of personal autonomy.

The divorce Janaki initiates against Suresh represents more than just leaving a failed marriage. Janaki's divorce from Suresh serves as a political act that frees her from the system which attempted to erase her voice and identity. Her bold choice to leave behind the Marar family's predetermined life path demonstrates both heartache and bravery. The battle to obtain custody of Riya represents the emotionally intense segment of her journey that demonstrates the intricate connections between her roles as mother and woman and her sense of self. Through her fight for Riya Janaki goes beyond asserting her rights as a mother because she regains her ability to love and nurture while also seeking to make her voice heard.

The narrative's depiction of alienation stands out because it shows alienation as a platform for creating new identities while avoiding the glorification of Janaki's pain. Janaki maintains her vocal presence despite enduring emotional trauma for many years. When Janaki meets Arjun she experiences a quiet renewal through his embodiment of love alongside emotional reciprocity and respect. The novel depicts her relationship as a step in her wider journey of healing and self-reconstruction instead of the ultimate goal of her quest.

Janaki's relocation to London alongside Arjun represents both a physical relocation and a substantial inner transformation as she starts a new chapter in her life. In London Janaki finds a setting of potential which allows her to envision a life shaped through personal preference instead of societal expectations. The new environment allows her to fully regain her narrative through self-expression and independence alongside her relationships. Her decision to start over

emotionally, legally, professionally, and maternally underscores the novel's central argument: Identity emerges not from inheritance or assignment but from an often-difficult process of creation within the experiences of one's life.

The transformation from alienation to agency and from imposed silence to chosen speech demonstrates the psychoanalytic working-through process where trauma undergoes re-narration and re-understanding before it can be transcended. Through memory and retrospection Janaki uses her voice to rebuild her fractured self. *Ancient Promises* aligns with Hélène Cixous's demand in "The Laugh of the Medusa" for women to inscribe themselves into history as well as language and power structures (Cixous, 1976).

Ancient Promises stands as both an introspective and politically significant work while investigating female identity within the constraints of tradition, silence, and social pressure. The text reveals identity crises and alienation as social and cultural experiences etched into women's physical and mental experiences. Janaki's transformation from a mute daughter and oppressed wife into an autonomous woman, mother, and partner illustrates how resistance combined with reflective practice and narrative recovery can create powerful change. Her commitments created through silent sacrifice now echo openly as she finally speaks for her own sake. Through her actions she takes control of her own life while simultaneously establishing that women everywhere should have the freedom to tell their own stories and shape their own destinies.

Janaki's transformation stands out because it reflects the shared struggles of many women who live with family expectations and societal judgments while managing their emotional expression. Jaishree Misra creates an authentic and human narrative by depicting a central female character who defies traditional roles of both victimhood and complete liberation. Janaki's refusal to be limited to one identity as wife, daughter, mother or lover reflects feminist demands for intersectional and diverse portrayals of women in literary works.

The novel rejects simplistic fantasies of liberation in favor of a more nuanced exploration of self-discovery. The story delivers an authentic and step-by-step evolution of identity that recognizes the challenges and doubts which come along with transformation. Janaki's emotional journey through guilt about leaving Riya and uncertainty about her new life with Arjun provides psychological depth to her struggle as it showcases the complex pain of seeking freedom within traditional constraints.

Jaishree Misra's storytelling functions as both a record of a woman's personal awakening and a reflective literary work which portrays the subtle bravery inherent in everyday acts of defiance. Through Janaki, the novel asks a vital question: Is it possible for women to change the societal script that has been imposed upon them? Janaki's life story demonstrates a cautious yet affirmative yes as the solution that relies on persistence rather than perfection.

Ancient Promises goes beyond personal narrative to serve as a political text that teaches readers to hear marginalized voices and question established cultural norms while demonstrating storytelling's power to create change. This narrative demonstrates that all women possess the ability to shape their futures regardless of being restricted or ignored.

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Can Grammar Be Learned Implicitly? Insights From the Omani EAP Classroom

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Abstract—The focus of this study is on the implicit knowledge that L2 learners acquire when they are asked to complete a communicative task. The study is couched within the framework of the Instructed Second language Learning (ISLA) and contributes to the discussion on the acquisition of implicit knowledge as an important pre-requisite for communicative competence. The study claims that implicit knowledge can be acquired when language learners are asked to complete a communicative task enriched with the target structure of the English passive. Seventy first year EAP students participated in the study, and they were asked to describe the process of frankincense production in writing based on prompts provided to them. The prompts were developed to elicit the target structure after the participants read a text enriched with the structure of the English passive. The results of the written production task were statistically significant despite the participants' low performance on the task. This suggests the development of implicit knowledge of the target structure that learners tapped into when communicating meaning; however, to achieve better outcomes, it is believed that learners need more tokens of the target structure over time. Future research may investigate the effects of token frequency integrated into a communicative task on the development of implicit knowledge. The study advocates for a change in language learning curricula from instruction structured around grammatical forms to task-based instruction.

Index Terms—implicit knowledge, language forms, instructed second language acquisition, EAP, EAP in Oman

I. INTRODUCTION

The purpose of this paper is to report on the results of an empirical study conducted in the context of learning English as a Foreign Language (EFL) at the tertiary level in Oman. Specifically, the study investigates the effectiveness of one type of pedagogical instruction known as Integrated Form-Focused Instruction (INT FFI) on the development of implicit knowledge of EFL learners. By focusing on this particular instructional strategy, the study situates itself within the broader framework of the Instructed Second Language Acquisition (ISLA).

II. INSTRUCTED SECOND LANGUAGE ACQUISITION (ISLA): LITERATURE REVIEW

Loewen and Sato (2017) state that Instructed Second Language Acquisition (ISLA) is a theoretically and empirically informed field of research that investigates the effectiveness of instruction on the acquisition of an additional language (L2). Instruction is defined as the systematic manipulation of language learning processes and the conditions under which they take place. ISLA differs from uninstructed (second language) L2 learning, which occurs in naturalistic settings when L2 learners acquire their additional languages without any type of formal instruction. Typically, uninstructed L2 learners develop a certain level of language proficiency that enables them to function effectively within a target community (e.g., Bengali expat community in the Sultanate of Oman that in addition to their mother tongue, use English or Arabic to communicate with Omanis and other expat communities that reside in Oman). Thus, instructed and uninstructed L2 learning constitute two distinct processes. Given that the context of the present study is the EAP classroom located in the Sultanate of Oman, the literature review in this section is limited to the discussion of selected research that focuses on instructed L2 learning only.

Since the goal of ISLA is the acquisition of an L2, first, it is important to understand what counts as a successful acquisition of an L2. In other words, what does it mean to successfully acquire an L2? In the era of communicative language teaching (CLT) (Council of Europe, 2025; Lightbown & Spada, 2013; Spada, 2007), successful L2 acquisition is defined as the ability to communicate meaning, which is known as communicative competence. Communicative competence is a theoretical construct, upon which many language standards for L2 teaching, learning, and assessment are built. For example, the Canadian Language Benchmarks (CLBs), a nationwide standard used in Canada for teaching, learning, and assessment, defines communicative competence as the ability to “communicate: to interact, to express, to

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interpret and to negotiate meaning, and to create discourse in a variety of social contexts and situations” (Center for Canadian Benchmarks, 2012, p. VI). Moreover, communicative competence is a complex construct that includes different types of knowledge (e.g., linguistic, discourse, strategic), competency areas (e.g., Sharing/Comprehending Information), and language skills. The CLB document states that language forms (grammar, sounds) require some form of explicit instruction; however, this should not be the primary goal of language teaching and learning. Instead, the focus on language forms should be guided by real-world tasks and their social contexts. In this framework, communicative ability always takes priority over language forms. If the goal of successful L2 learning is the acquisition of communicative competence (i.e. the ability to communicate effectively), the next question that arises here is: What type of instruction would facilitate this acquisition?

To answer this question, research on ISLA (e.g., Ellis et al., 2009; Loewen, 2021; Rebuschat, 2013) has investigated the extent to which explicit knowledge and implicit knowledge that L2 learners acquire during instructions facilitate the acquisition of communicative competence. Rebuschat (2013, p. 597) makes the following distinction between explicit and implicit knowledge.

Implicit learning generally occurs without the intention to learn and without awareness of what has been learned, that is, learners are often un-aware of having acquired knowledge. Explicit learning is the learning process that results primarily in conscious knowledge. This is usually associated with intentional learning conditions.

Based on this definition, explicit knowledge is intentionally acquired and thus represents conscious knowledge. For instance, metalinguistic knowledge about language constitutes explicit knowledge. In contrast, when L2 learners are capable of expressing themselves without being consciously aware of language forms that are used to convey the meaning, they are believed to have access to implicit knowledge in spontaneous, real-time communication.

Over the years, research (e.g., Williams & Rebuschat, 2023) has raised many questions about the interaction between these two types of knowledge. Some researchers (e.g., Krashen, VanPatten) believe that explicit knowledge and implicit knowledge represent two distinct types of knowledge and therefore, they do not interface. In fact, Van Patten argues (Lichtman & VanPatten, 2021a, 2021b) that implicit knowledge is the only knowledge that contributes to the development of communicative competence. The proponents of the weak interface between explicit and implicit knowledge recognize the distinct nature of both (Loewen, 2021) by acknowledging that not all explicit knowledge contributes to the development of the abilities to communicate in L2. However, under certain conditions, explicit knowledge can become implicit and thus can contribute to the acquisition of communicative competence. According to Loewen (2021), these conditions are: (i) the availability of L2 input that is enriched with targeted language forms; (ii) the availability of form-focused instruction and corrective feedback when learners actively negotiate for meaning; (iii) the availability of output that is viewed not as a byproduct of communication, but rather as means to acquire communicative competence.

There is a different approach to ISLA that advocates for no focus on form activities where L2 learners’ attention is drawn to meaning rather than forms in tasks that have to be completed. For example, Ellis believes that no form-focused activities are necessary. According to Ellis, while working on communicative tasks, learners acquire L2 experientially through learning how to communicate in their L2s (Ellis, 2005; Ellis et al., 2009). As a proponent of task-based learning where meaning is always prioritized over language forms, Ellis argues that learners can discover patterns and rules of L2 without the intention of learning them because their attentional resources are allocated to meaning. The discovery of language patterns and rules happens when L2 learners complete communicative tasks enriched with targeted language forms; however, no explicit instruction on those language forms is necessary.

One of the empirical studies that investigates the relationship between explicit and implicit knowledge and their contribution to the development of communicative competences is Spada et al. (2014). Spada et al. supports the view that explicit knowledge under some conditions can become implicit if it is followed by communicative practice. (See also DeKeyser & Suzuki, 2025, although there are some differences in terminology because DeKeyser uses the terms declarative and procedural knowledge instead of explicit and implicit knowledge.) The uniqueness of Spada et al.’s study is that it investigates the timing of form-focused instruction within a communicative lesson plan. In other words, the study raises the following question: What is the optimal time to focus learners’ attention to form within a communicative lesson?

To answer this question, two types of instruction were proposed (see also Spada & Lightbown, 2011) and their contribution to the explicit and implicit knowledge. These instructions are Isolated Form-Focused Instruction (ISO FFI) and Integrated Form-Focused Instruction (INT FFI). In a quasi-experimental classroom study, both types of instruction have activities that focus learners’ attention to language forms; however, ISO FFI and INT FFI differ in the timing when this focus on form happens. In ISO FFI, focus on form takes place when a language form is isolated from a communicative activity, and can happen before, during or after an activity. ISO FFI may include teacher-led instruction, corrective feedback or enhanced input that facilitates L2 learners’ noticing of the language forms they need to communicate meaning. 4 teachers and 109 intermediate adult L2 learners enrolled in a non-credit language program in Canada participated in the study. Out of 4 classes, 2 classes received ISO FFI and two classes received INT FFI. The ISO FFI and INT FFI lessons had the same communicative theme of health; however, they were different in how attention was drawn to the target structure of the English passive, that is separately from or integrated with the

communicative context. An error correction task (ECT) and an oral production task (OPT) were used in the study to investigate the effectiveness of ISO FFI and INT FFI in the acquisition of the English passive. These tasks were designed to tap into different types of knowledge, ECT to explicit knowledge and OPT to implicit knowledge.

The findings of the study showed significant improvement for learners who have experienced ISO FFI and INT FFI lessons. The differences were found in the participants' performance on the tasks. Thus, L2 learners who received ISO FFI improved on the decontextualized error correction task than L2 learners who received INT FFI. L2 learners who received INT FFI improved more on the OPT. The results showed that these two types of instruction are not mutually exclusive but rather complementary. There is also a tentative finding that these types of instruction tap into different kinds of knowledge, ISO into explicit knowledge and INT into implicit.

More research is needed to investigate explicit and implicit knowledge, as well as the conditions under which L2 learners can develop implicit knowledge of L2 language forms. The current study aims to address this gap in the literature.

III. METHODOLOGY

A. Research Questions

The study aims to investigate the effect of implicit learning on the acquisition of the English passive. Specifically, the question is: Can L2 learners use the structure of the English passive in a written production task of describing a process without any explicit instruction? Is it possible to acquire a grammatical structure implicitly within the context of a communicative task?

B. Participants

Seventy first-year university students, with an average age of 19.5, took part in the study. Their level of language proficiency was determined based on the results of the mandatory test that the students had to take at the end of their year in the Foundation Program. The Foundation Program is a bridging program that assists students in developing academic skills required for entering their respective majors at the university. The Program includes instructions in mathematics, IT, and academic English. The required level to enter the university is the IELTS Band 4.5-5. The students enrolled in the two first-year EAP university courses were randomly selected for the study. The target structure was the English Passive, as one of the grammatical structures included in the course syllabus.

C. Treatment

The communicative lesson plan was developed to introduce the target structure of the English passive implicitly while the participants worked on reading comprehension. During the lesson the participants first practiced the key vocabulary included in the reading passage titled "We love Oman: The Land of Frankincense" and then were asked to read the text. The reading passage was enriched with the target structure of the English passive and included sentences similar to *Frankincense is also known for its healing and restorative properties. The best quality of frankincense is found in the Dhofar region and is abundantly sold in the souqs.* (For the full text, please refer to Appendix A). No explicit instruction on the target structure of the English passive was given to the students during the lesson. Thus, the attentional resources of the students were allocated to understanding the main ideas of the text and completing the task of creating mind maps that captured those ideas. Once the students presented and discussed their mind maps, they were told that their next task would be to describe the process of how frankincense is made. The participants were asked first to watch a video that explains the process of frankincense production (YouTube, n.d.) and then write a step-by-step description of the process based on the information presented in the video and the vocabulary prompts provided to them. The prompts were structured to elicit the use of the English passive, e.g. *small, careful cuts/ into the bark of Boswellia trees/ make; a gummy, milky white resin/ produce* (please refer to Appendix B for a full list of the prompts). The students were asked to submit their descriptions to the course instructor. No corrective feedback on the target structure of the English passive was provided to the participants.

IV. RESULTS

The results of the participants' performance were analyzed. To determine what constitutes the correct use of the English Passive in the written production task, the sentence, such as *Then the resin often sold at Hafa souq in Salalah* was considered ungrammatical. The sentences similar to the sentence *The scraped resin is then separate into different grades* was considered grammatical. In other words, if a student made an attempt to use the correct structure of the English passive *to be + past participle*, however, made an error in the use of the past participle, this sentence was considered to be a target-like sentence.

The results of the study show that the average score across seventy students was 5.3. This suggests that the overall participants' performance is moderately above the midpoint. To decide whether or not the average score of 5.3 obtained on the productive task was statistically significant, that is significantly different from what is expected by random chance, a one-sample t-test was conducted. The test value was set at 4.5 that represents the expected score if the participants were guessing randomly. It was calculated as follows: 18 items x 25% probability of success. The results of

the t-test indicated that the mean score ($M = 5.30$, $SD = 1.76$) was significantly greater than the test value of 4.50, $t(69) = 3.81$, $p < .001$. The effect size was medium to large, Cohen's $d = 0.46$.

The results show that as a group the participants were not guessing. They demonstrated the correct use of the English passive in a productive writing task. The average score of 5.3 represents a real, measurable performance above what would be expected by random chance. The results also show that the participants performed better than guessing; however, this result does not mean that they have mastered the material, i.e. internalized the structure of the English passive.

V. DISCUSSION

The study raised the question of whether or not it is possible to acquire the structure of the English passive without any explicit instruction. The results of the study showed that the participants were able to use the target form in a written production task of describing a process. These findings are in line with research that investigates the effectiveness of task-based instruction in the development of implicit knowledge (e.g., Ellis et al., 2019). However, the results of the study also showed that the medium rate of the participants' performance on the task was low and only slightly above the chance level. This considerably low albeit statistically significant rate of the participants' performance should not be taken as an indicator of lack of implicit knowledge of the target structure of the English passive. One possible explanation of the low rate could be the token frequency of the target structure of the English passive used in the input. This can simply mean that the participants need more exposure to the target structure over time in order to use it effectively in a productive communicative task and in spontaneous communication. One might even argue that if the participants had more exposure to the target structure, their overall performance could have been better. The importance of input has been emphasized by Lichtman and VanPatten (2021b, p. 338) in their statement that "all (largely comprehensible) input is beneficial, not just that embedded in interaction, as long as the primary intent of the learner is to interpret meaning (i.e., comprehend something)." Thus, it is possible to assume that if L2 learners were exposed to many different, level-appropriate communicative events over time, there would be improvement in the development of their abilities to use the target structure effectively in communication.

One of the implications of the findings of this research is that the study emphasizes the importance of communicative tasks in developing L2 learners' abilities to communicate meaning. An argument has been made in the literature about the importance of developing the language learning curricula around themes/questions, tasks, and projects that would provide rich input for L2 learners (for a sample of how these tasks can be developed, see Clarke & Hastings, 2019). Therefore, by showing that learners can acquire implicit knowledge, this paper is a call for change in the Omani language classroom towards emphasizing implicit knowledge over explicit learning of language forms.

This study has several limitations that should be considered while interpreting the study results. First, the study uses only one assessment instrument. The written production task used in the study may not capture the full range of the participants' implicit knowledge. Second, the chance level benchmark of 4.50 while statistically justified represents a conservative estimate that may not fully account for the complexity of random responding in the task.

Future research can focus on the development of implicit knowledge over time and the effects of token frequency and the structure of the communicative task in the development of implicit knowledge.

VI. CONCLUSION

The focus of this study is on the implicit knowledge that L2 learners acquire when they are asked to complete a communicative task. The results show that the participants demonstrated implicit knowledge of the target structure of the English passive at a slightly above chance level. This low albeit statistically significant participants' performance on the task can be due to the insufficient number of tokens of the target form. Thus, the argument is made in favor of providing L2 learners with many types of communicative tasks that are enriched with target forms to be acquired by L2 learners. The study also argues for changing the focus of the curricula built around language forms to be taught explicitly to curricula that are structured around tasks and projects that facilitate the acquisition of implicit knowledge that is needed for effective communication in spontaneous real-life situations.

APPENDIX A. READING COMPREHENSION TASK

We love Oman: The land of frankincense. (Times News Service, 2020)



Task: Read the text. Based on the reading passage develop a mind map that captures the main ideas of the text.

Key vocabulary

Frankincense (frankincense trail), to be an integral part of something, heritage, resin, heal, restore (healing & restorative), abundantly, alluvial bed of the wadi (alluvium is a type of soil), embodiment of culture, incense, flourish

Frankincense is an integral part of Oman's culture and heritage. This aromatic resin **is** mostly **used** in incense and perfume. The resin **is obtained** from the tree bark of genus *Boswellia*. Frankincense **is** also **known** for its healing and restorative properties. The origin of Frankincense can **be traced** back to the Arabian Peninsula.

Oman **is known** to produce the world's finest frankincense. The best quality of frankincense **is found** in the Dhofar region and **is** abundantly **sold** in the souqs. Hafa Souq in Salalah is an exclusive place that sells it. Oman's frankincense trail in Dhofar region **was visited** by explorers Marco Polo and Lawrence of Arabia. The frankincense tree (*boswellia sacra*) can still **be found** in Wadi Dawkah. The trees grow in the alluvial bed of the wadi under the extreme heat of this region.

According to Oman's Ministry of Tourism, "Frankincense is a symbol of life, or rather it is life itself, for the Dhofari people. It is not a mere tree, but an embodiment of culture, history, sociology and geography. The Omani researcher and historian, Abdul Qadir bin Salim Al Ghassani, mentions in his book 'Dhofar, the Land of Frankincense' that huge quantities of incense **were imported** by Alexander the Great from Arab lands. In ancient times the Frankincense Trail **was considered** to be the most important commercial route throughout southern Arabia. Other sources suggest that frankincense **was used** round the throne of King Solomon as incense. In the present time, we know that this incense **is used** at the Vatican in Rome".

The Land of Frankincense in Al Baleed in Salalah **is recognized** by UNESCO as one of its World Heritage Sites. The Museum of the Land of Frankincense **is located** in the region of Al Baleed in Salalah and borders the ruins of Al Baleed Archaeological Park. Visitors can discover how trade with Frankincense and maritime strength ensured that the region flourished in the 12th century. Still used in important ceremonies, frankincense also remains a symbol of Omani hospitality. Its fragrant resin **is** still **burned** today throughout the Sultanate to welcome guests.

APPENDIX B. DESCRIBING THE PROCESS

Task: How is Frankincense produced?

Watch the video (YouTube, n.d.) and describe the process of frankincense production.

The sentences below will help you in your description of this process.

1. Resin of the special tree/ harvest
2. The bark of the tree/ scrape with a knife
3. Then the resin/ dry and sell at Hafa souk in Salalah
4. Many things/ derive from the special resin
5. Frankincense oil/ extract/ through distillation
6. The resin/ boil/ chemists in the lab to extract its essences
7. It is then bottle/ to be/ sell in the US and beyond
8. A tiny flask of perfume/ sell for \$50 in the US
9. The white, sometimes greenish resin/ separate
10. It/ think to be a good medicine to help with gastro-intestinal and other illnesses

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AI Versus Human Lexicographers: A Comparative Analysis of Translation Strategies for Arabic Collocations and Cultural References*

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Abstract—Heliel (2000) identified a set of Arabic collocations and cultural references that have consistently challenged human lexicographers, with many opting to simply omit them from their compilations, including the widely used *Al-Mawrid Arabic-English dictionary*. Deploying Pedersen's (2011) taxonomy of translation strategies, this study interpretatively evaluated 150 English translations of this set. The translations were mined from three Arabic-English bilingual dictionaries compiled by human lexicographers (Baalbaki, 2001; Abu-Ssaydeh, 2013; Hafiz, 2004) and two sets were generated by the two leading artificial intelligence (AI)-powered systems: ChatGPT and Google Gemini. The findings reveal a striking contrast in strategy use: while human lexicographers frequently omitted difficult phrases, AI tools provided complete translations for all expressions (100%). Despite their relatively recent development and launch, the two AI-systems exhibited lexicographical capabilities comparable to human lexicographers, particularly in adopting target-oriented strategies. This suggests that such tools could complement traditional lexicography by enhancing coverage, efficiency, and contextual richness. Perhaps, a hybrid "H-AI" approach may well be the way forward.

Index Terms—artificial intelligence, human lexicography, Arabic to English translation, ChatGPT, Google Gemini

I. INTRODUCTION

As communication, translation brings cultures together through often-manipulative negotiations of cultural differences whereby sources are usually adapted to reflect prevailing cultural norms of the target cultures (Baker, 2018). This becomes particularly problematic when translating collocations and cultural references, which frequently lack direct equivalents in the target language—especially between linguistically and culturally distant languages such as Arabic and English. In such cases, bilingual dictionaries serve as essential resources, underscoring the interdependence of lexicography and translation.

Given its importance for translation, lexicography significantly influences quality. Bilingual dictionaries are often the translator's (and other language users) first port of call, but their limitations in addressing collocations and cultural references tend to hinder rather than help the translation process. Translators frequently need to move beyond the literal meanings provided in bilingual dictionaries to preserve the original context and ensure culturally appropriate renderings. Unfortunately, most bilingual dictionaries offer inadequate support for culturally sensitive translations (Abu-Ssaydeh, 2012). This issue is especially evident in Arabic to English translation, where collocations and cultural references pose significant challenges, particularly those deeply couched in religious, social, or historical contexts. Here, achieving effective translations requires not only linguistic gymnastics but also cultural awareness and approximation to ensure that translations are fully relevant to both source and target languages and cultures.

Simply put, collocations are word pairings that naturally co-occur in a language and often carry fixed meanings. Translating these specific language expressions presents unique difficulties due to their semantically restricted combinations and specific connotations. For example, 'deliver a speech,' 'deliver a pizza' or 'deliver a baby' illustrate how the same verb collocates differently depending on intended yet unique and fixed meanings (Baker, 2011). Similarly, cultural references encapsulate a community's history, religion, values, and social structures and practices. These language items are challenging as they tend to cause misinterpretations and, consequently, mistranslations.

Traditional Arabic-English bilingual dictionaries often present words in isolation without contextual cues required to capture embedded meanings. To address this gap, supplementary resources—such as glossaries of cultural terms, encyclopaedias, and even consultations with native speakers or subject-matter experts—are necessary, particularly when dealing with complex collocations and cultural references. Abu-Ssaydeh (2012), for example, critiques the limitations of Arabic-English dictionaries for not effectively representing collocations and suggests systematic improvements, such as refining collocational ranges and enhancing metaphorical representations to better support learners and translators of Arabic.

In an increasingly globalized world, the demand for translation has grown exponentially. To meet this demand, machine

* This paper represents the opinions of the author(s) and does not mean to represent the position or opinions of the American University of Sharjah.

translation (MT)—using computational algorithms to translate text without human intervention—has been widely adopted, driven mostly by economic imperatives (Hassan et al., 2018; Alkhatib & Shaalan, 2018). Since its early adoption, MT has undergone significant evolution, transitioning from early rule-based approaches (relied on grammar rules and dictionaries) through statistical methods, and more recently, to Neural Machine Translation (NMT). The latter has revolutionized the field by leveraging neural networks to produce more fluent translations (Koehn & Knowles, 2017) and paved the way for the recent introduction of artificial intelligence (AI) systems for translation. The shift from traditional human translation through MT to AI-powered tools has reshaped the translation academic and business landscapes.

Research on Arabic-English lexicography points to the conclusion that despite advances in machine and AI translation, human translation remains more reliable for effectively rendering Arabic collocations and cultural references, whereby they explore contextual contours necessary to interpret and render such expressions often innovatively, while both preserving original meanings and ensuring relevance in the target language. While MT systems are easily accessible and mostly cost-effective, they often struggle with culturally embedded expressions as they “lack sensitivity to idiomatic language and cultural context, resulting in translations that are structurally sound but semantically flawed” (Koehn & Knowles, 2017, p. 72). Although recent advancements in AI-powered translation have improved the handling of idiomatic language uses, they generally still struggle with highly contextual sensitive human language use such as collocations and cultural references, particularly for a language such as Arabic whereby linguistic, cultural, and contextual subtleties are critical for translation (Eddahibi & Mensouri, 2023).

The early launched AI systems like ChatGPT (GPT), released in November 2022, and Google Gemini (GG), launched in December 2023, have made remarkable progress in handling context and adapting translations through reinforcement learning from human feedback (RLHF) (Alkhawaja, 2024). However, their ability to interpret deeply embedded cultural references remains limited (Jiao et al., 2023). By incorporating deep learning and generative capabilities, AI systems have demonstrated notable improvements in contextual and stylistic interpretation as they continue to refine their ability to differentiate between literal and idiomatic meanings, thereby enhancing translation appropriateness. Still, researchers have reported that these tools struggle with highly specific cultural and idiomatic expressions and produce lower quality translations than humans. Hao et al. (2025, p. 45) aptly comment:

Despite their impressive capabilities in interacting with humans and handling various natural language processing tasks, dialogue-based large language models like ChatGPT may still provide unsatisfactory responses in certain conversational scenarios. This is because these models are based on generative models that rely on statistical patterns in the data they were trained on, rather than in-depth understanding or true comprehension of the content.

As such, human translators remain largely the benchmark for quality since they “draw upon cultural and contextual awareness to convey the essence of the message,” as Munday (2016, p. 43) points out. This is a skill AI systems have yet to fully replicate but are fast developing through advanced algorithms and RLHF. In Arabic-English translation, collocations and cultural references require special handling that only human translators are said to provide, as they engage in interpretative processes that ensure effective renderings. This highlights the inseparability of language and culture in translation—whereby culture shapes language, and language, in turn, reflects culture and where even humans often face challenges in effectively navigating this interwoven relationship (Faiq, 2019).

Building on this premise and on Heliel’s (2000) findings regarding the challenges posed by the 30 problematic Arabic expressions (collocations and cultural references), this study investigates two hypotheses:

1. Given their reported limitations, AI-powered translation tools of GPT and GG will omit collocations and cultural references when translating from Arabic into English.
2. AI-powered translation tools of GPT and GG will face difficulties in interpreting and effectively rendering collocations and cultural references from Arabic into English.

To evaluate these two hypotheses, this study compared 150 translations of the Arabic collocations and cultural references delimited by Heliel (2000). In so doing, the study evaluates the performance of two widely used AI translation tools—GPT and GG—against three leading Arabic-English bilingual dictionaries authored by Arab lexicographers (human lexicographers (HLs)). The comparison is based on Pedersen’s (2011) typology of translation strategies supplemented by two strategies used for this study. The remainder of this study is structured as follows: section 2 outlines the material and method; section 3 presents the results followed by the discussion of these results in section 4. The conclusion provides a summary and some suggestions for further research.

II. MATERIAL AND METHOD

This study evaluates 150 English translations of the 30 challenging Arabic collocations and cultural references identified by Heliel (2000) as most challenging even for human lexicographers, let alone AI-systems. As shown in Appendix, three sets of translations were extracted from Arabic-English bilingual dictionaries, while two sets were generated by ChatGPT (GPT), GPT-4 model, and Google Gemini (GG), Gemini 2.5 Pro model; both on June 13, 2024. The prompt used for each system was: ‘taking context into consideration, provide a translation of the uploaded Arabic document into idiomatic English’.

Launched in November 2022, GPT is designed by OpenAI and uses transformer-based models and RLHF to enhance conversational capabilities. GPT is continuously improving natural language understanding and generation. Released over

a year later (December 2023), GG is an AI model developed by Google DeepMind. It combines Google's advanced NLP capabilities with RLHF and deep neural network integration. It is designed to offer a competitive AI alternative, particularly to GPT. Both GPT and GG use transformer architectures and reinforcement learning from human feedback. Both are designed to handle complex language processing tasks to generate natural, fluent, and context-aware texts for a wide range of applications, including translation. Choosing between these two large language models (LLMs) depends on the purpose of use (GPT offers creativity and conversational depth, while GG offers precision and factual accuracy). In an ideal world, the combination of the strengths of both LLMs through a hybrid approach could lead to more robust and versatile AI applications.

The sets of data by human lexicographers (HLs) were sourced from three leading Arabic-English bilingual dictionaries:

1. Human Lexicographer 1 (HL1): *Al-Murshid Arabic-to-English Dictionary* (MUR) is compiled by Abu-Ssaydeh (2013). This bilingual dictionary provides translations and usage notes with a particular emphasis on assisting users in handling culturally embedded collocations and idiomatic expressions.
2. Human Lexicographer 2 (HL2): *Al-Mawrid Arabic-English Dictionary* (MAW) is compiled by Baalbaki (2001). Widely regarded for its extensive vocabulary and user-friendly format, this dictionary is a primary reference for Arabic-English translation (the 737 of Arabic-English dictionaries, so to speak). However, as noted by Heliel (2000), its 1988 edition offered limited treatment of culturally specific references and collocations and included only 17% of the 30 phrases. Its 2001 edition (fourteenth) is not much better either as discussed in this study.
3. Human Lexicographer 3 (HL3): *Al-Hafiz Arabic Collocations Dictionary* (HAF) is compiled by Hafiz (2004). Unlike the previous dictionaries, this resource is dedicated exclusively to Arabic collocations and their English equivalents.

The translations provided by these three HLs along with the two sets generated by the AI tools (GPT and GG) were analyzed both quantitatively and qualitatively using Pedersen's (2011) taxonomy of translation strategies to which two strategies were added for the purpose of this study. The full datasets, including the identified strategies for each of the 150 translations, are presented in Appendix. The identification / categorization of strategies was conducted by the author of this study, drawing on nearly four decades of academic experience and complemented by Fayed's (2007) monolingual (Arabic-Arabic) dictionary of collocational expressions.

Pedersen (2011) offers a comprehensive framework for assessing the translation of cultural references and collocations. The taxonomy includes six primary strategies: source-oriented strategies (SO) or target-oriented strategies (TO):

- Source-Oriented Strategies (SO)
 - Retention (R): Here, the cultural reference is retained in its original form or slightly adapted to fit the target language. An R translation may appear italicized or otherwise marked to indicate its foreign origin.
 - Specification (SP): This strategy is usually materialized through the insertion of additional information or the inclusion of further contextual clues to clarify the cultural reference and enhance comprehension.
 - Direct Translation (DT): Through this strategy, cultural reference is translated directly, without modification or added explanation. Except for some necessary language adjustments, the structure and meaning are preserved as much as possible as with proper and brand names, for example.
- Target-Oriented Strategies (TO)
 - Generalization (G): Here, the source element is replaced with a broader / general term in the target language that maintains the overall meaning but loses the specificity of the source. This strategy often yields less precise translations.
 - Substitution (SU): This strategy results in the replacement of the source item with a corresponding reference in the target culture; often involving a completely different rendering.
 - Omission (O): Here the source items are simply omitted (deleted, excluded) if they are deemed unnecessary or too complex to translate.
- Other Strategies (OS)

While Pedersen's framework provides a structured approach, real-world translation often requires other strategies to address complex translational tasks. To account for this, an additional category—other strategies (OS)—is suggested in this study, encompassing two strategies:

- Mistranslation (MT) refers to instances where translations were simply incorrect.
- Combination of Strategies (CS) refers to cases where two or more translation strategies were applied to render a single collocation or cultural reference.

By applying these strategies, this study assesses how GPT and GG compare with the three HLs in handling the translation of the challenging Arabic collocations and cultural references into English. The following section presents the results of this analysis.

III. RESULTS

Appendix provides the full datasets with the strategies assigned to each of the 150 translations by the two AI systems (GPT and GG) and the three human lexicographers (HL1, HL2, HL3). Table 1 provides the total translations and percentages for each translator (t=total).

TABLE 1
TOTAL TRANSLATIONS FOR GG, GPT AND HLS

Arabic source phrases	GG		GPT		HL1 (MUR)		HL2 (MAW)		HL3 (HAF)	
30	t	%	t	%	t	%	t	%	t	%
	30	100	30	100	20	67	5	17	3	10

Table 2 provides a summary of the translation strategies assessment and frequencies per translator (t=total).

TABLE 2
SUMMARY OF TRANSLATION STRATEGIES ASSESSMENT FOR GG, GPT AND HLS

Strategy		GG		GPT		HL1 (MUR)		HL2 (MAW)		HL3 (HAF)	
		t	%	t	%	t	%	t	%	t	%
SO	R	0	0	0	0	0	0	0	0	0	0
	SP	0	0	1	3.3	4	13.3	0	0	0	0
	DT	18	60	15	50	8	26.7	0	0	0	0
TO	G	1	3.3	2	6.7	4	13.3	1	3.3	1	3.3
	SU	3	10	1	3.3	3	10	1	3.3	2	6.7
	O	0	0	0	0	10	33.3	25	83.3	27	90
OS	MT	5	16.7	0	0	0	0	1	3.3	0	0
	CS	3	10	11	36.7	1	3.3	2	6.7	0	0
Total		30		30		30		30		30	

Table 3 outlines the total frequencies and reflective percentages for all strategies for the five translators (GG, GPT, and the 3 HLs).

TABLE 3
TRANSLATION STRATEGIES USED AND PERCENTAGES FOR GG, GPT AND HLS

Strategy		Total	%
SO	R	0	0%
	SP	5	3.3%
	DT	41	27.3%
Total		46	30.61%
TO	G	9	6%
	SU	10	6.7%
	O	62	41.3%
Total		81	54%
OS	MT	6	4%
	CS	17	11.3%
Total		23	15.3%
Total (all)		150	100%

The results provide valuable insights into the strategies employed by the two AI-powered tools (GPT and GG) and the three human lexicographers (HL1, HL2, and HL3) in producing 150 translations into English of the 30 complex Arabic collocations and cultural references. Pedersen's (2011) taxonomy of translation strategies along with the two supplementary strategies—mistranslation (MT) and combination of strategies (CS) specifically used in this study; were deployed in this study. As Tables 2 and 3 show, source oriented (SO) strategies, which aim to retain or minimally alter the original expressions, were scarcely used across all translators. Specifically, retention (R) was entirely absent (0%) in all 150 translations. This finding may underscore the inherent challenges of directly transferring Arabic collocations and cultural references into English without some adaptation and even manipulation. This finding also highlights the interesting point that the two AI-tools behaved like the three HLs by not attempting to retain/preserve collocations and cultural references in their original form. Tables 2 and 3 also indicate that target oriented (TO) strategies, which prioritize the expectations of the target audience (domestication), were the most employed, accounting for 54% of all uses. The two other strategies of MT and CS accounted for 15.3% of all uses, reflecting both linguistic and cultural challenges as well as innovative ways in rendering Arabic collocations and cultural references into English, particularly the use of CS tools.

IV. DISCUSSION

The interpretative assessment of the 150 translations produced by three human lexicographers (HLs) and two AI systems (GPT and GG) reveals that TO strategies dominated the dataset, being employed nearly twice as SO strategies. Table 3 shows that SO strategies were used 46 times out of 150 (30.6%), with GG slightly surpassing GPT at 18/30 uses (60%) compared to 16/30 (53.3%). Among the three HLs, only HL1 employed SO strategies 12 times (40%), while HL2 and HL3 did not use them at all.

Conversely, TO strategies accounted for 81 out of 150 uses (54%). The three HLs exhibited the highest use of TO strategies, with HL1, HL2, and HL3 employing them 17, 27, and 30 times, respectively. Meanwhile, GPT and GG used TO strategies sparingly, with only 4 and 3 occurrences each. Notably, omission (O) was the most frequently used TO strategy, appearing 62 times (41.3%), almost exclusively by HLs, with HL3 using it most (27 times, 90%), followed by HL2 (25 times, 83.3%) and HL1 (10 times, 33.3%). The prevalence of omission among HLs points to their tendency to systematically exclude any of the Arabic phrases that they deemed to be complex or those that indicate highly culturally specific references and content. In contrast, GPT and GG did not use omission at all, reflecting their algorithmic design to produce complete translations. This finding contradicts hypothesis 1 of this study, which posited that unlike AI systems, human lexicographers (translators) would at least provide explanatory renderings for Arabic collocations and cultural references in English to assist translators. The discussion below examines Pedersen's two categories (SO and TO), alongside the category of OS, which was introduced specifically for this study.

A. Source-Oriented Strategies (SO)

The limited use of SO strategies highlights the challenge of preserving the meanings of Arabic collocations and cultural references. Notably, retention (R) was not used at all, suggesting that all translators—both human and AI—prioritized finding appropriate target language renderings that approximated the source meanings in English. This complete absence of R reflects the difficulty of maintaining the semantic and cultural weight and complexity of the Arabic phrases analyzed here as underlined by Heliel (2000).

Specification (SP) appeared only five times (3.3%) across the 150 translations, as shown in Table 3, with GPT employing it once and HL1 four times. The infrequent use of SP reflects the difficulty of adding explanatory information to translations, a task that often requires subtle contextual understanding—something AI tools may still be developing. Examples 3 (أم القرى) and 29 (بيوت الله), Appendix, indicate how SP was used by GG (Mecca), GPT (Mecca) and HL1 (Mekka) in their English translations. HL2 and HL3 simply omitted these two examples.

Direct Translation (DT), the most frequently used SO strategy, appeared 41 times (27.3%), as shown in Table 3. GPT and GG relied heavily on DT, using it 18 and 15 times, respectively, compared to eight uses by HL1. HL2 and HL3 did not use DT at all. The preference for DT by AI tools suggests their tendency to adhere closely to the semantic loads of the source Arabic phrases. HLs often deviated from DT, instead employing TO strategies like substitution (SU) to achieve greater cultural relevance. For instance, in rendering item 10 (خفف الوطأ), Appendix, GG, GPT and HL1 used DT in their translations to produce 'lightened the burden,' 'eased the pressure,' and 'to lighten the burden,' respectively. Once again, HL2 and HL3 simply opted to omit.

B. Target-Oriented Strategies (TO)

As Table 3 shows, the reliance of the three HLs on TO strategies demonstrates, in theory, their ability to navigate the complexities of the target language and culture. Among TO strategies, substitution (SU) was the most used after omission (O), occurring 10 times (6.7%). The three HLs accounted for six of these SU uses, while GPT and GG used it three times and once, respectively. The use of SU often requires cultural adaptation, showcasing some cultural gymnastics necessary to translate specific collocations and cultural references effectively. For example, item 26 (بيت دعارة, lit. house of adultery, fornication, immorality, prostitution), Appendix, was rendered as 'brothel,' 'a brothel,' 'brothel,' and 'brothel' by GG, GPT, HL2 and HL3, respectively. Strangely enough, HL1 excluded (omitted) this expression.

Generalization (G), which simplifies cultural references for accessibility at the cost of some nuance, was used nine times (6%). HL1 applied it most frequently (four times), while the other two HLs used it only once each. GPT and GG applied G sparingly, with one and two uses, respectively. For example, GPT, HL1, HL2 and HL3 all used G to render item 13 (رفع الكلفة), Appendix, as removed formalities, to take liberties, take liberties with, and to take liberties with, respectively. GG mistranslated (MT) this item because it misinterpreted the intended connotations focusing on the literal meaning instead.

Omission (O) emerged as the most dominant strategy overall, accounting for 41.3% of all strategies. Human translators (three HLs), particularly HL2 (83.3%) and HL3 (90%), relied heavily on omission, frequently excluding many Arabic collocations and cultural references from the dataset they most likely considered too obscure or challenging. On the other hand, GPT and GG did not use omission at all, reflecting their algorithmic design to produce full translations regardless of difficulty. This contrast underscores differing priorities: while human translators may prioritize readability and relevance, AI tools strive for comprehensiveness.

The high frequency of omission by HL2 and HL3 and the complete absence of omission among the AI tools (GPT and GG) challenge conventional assumptions in translation studies. At the very least, GPT and GG provided renderings that could assist translators and other users in deciphering the cultural and idiomatic meanings of the Arabic expressions. HL1 performed better than HL2 and HL3, but still employed omission 10 times, which is not ideal for translators and others seeking guidance with challenging linguistic structures. Regardless of quality, by generating renderings for the entire dataset (100%), both GPT and GG offer insights and starting points for translators handling such difficult expressions. This observation undermines and challenges the second hypothesis set out for this study.

C. Other Strategies (OS)

As Table 3 shows, the supplementary strategies of mistranslation (MT) and combination of strategies (CS) accounted for 15.3% of all strategies. MT occurred six times (4%), predominantly in GG's output (five times, 16.7% for items 4, 8, 9, and 13), with one instance by HL2 (3.3%, for item 16). GPT, HL1 and HL3 produced no MTs. Even in the case of the five mistranslations (MTs) produced by GG (and one by HL2), translators and other users could still derive some help (at least identify inappropriate renderings and potentially reverse engineer them into effective translations). That HL2, a human lexicographer, produced an MT was unexpected.

Combination of strategies (CS) was used 17 times (11.3%), with GPT accounting for the majority (11 cases, 36.7%). GG used CS three times (10%), while HL1 and HL2 applied it once (3.33%) and twice (6.7%), respectively. For example, item 2 (أهل اللغة), Appendix) was respectively rendered by GPT and GG as linguists, people of language and the people of language, linguists. Both GPT and GG used DT and SU, albeit not in the same order, to handle this item through translation into English.

The minimal use of CS by the three HLs—once and twice by HL1 and HL2, respectively—compared with the 17 occurrences by GPT and three by GG is significant. This suggests that prevailing assumptions about the inability of AI-powered translation tools to handle context-sensitive Arabic expressions, in this case, may now be outdated. By using CS to generate English translations, GPT appears to recognize the value of offering multiple alternatives or additional contextual information; an approach HLs did not adopt in their translations.

The analysis reveals distinct patterns in strategy use between GPT, GG and the three HLs:

- GPT and GG excelled in producing complete translations, avoiding omissions while heavily relying on DT. However, GG struggled with some cultural meanings and ended up generating 5 MTs. GPT's higher use of CS and its zero MT renderings suggest an emerging (and being fast augmented) ability to handle complex translation tasks such as collocations and cultural references even from difficult languages, including Arabic.
- HL1, HL2 and HL3 demonstrated the expected sensitivity to cultural and contextual subtleties. This is axiomatically reflected in their use of mostly target oriented strategies. However, their heavy reliance on omission (O), especially HL2 and HL3, suggests a tendency to simplify translations by excluding difficult phrases, which may compromise textual completeness and is not helpful for translators, learners and other users of Arabic.

The findings of this study largely align with existing literature on translating collocations and cultural references while simultaneously challenging certain assumptions about some limitations of AI (Eddahibi & Mensouri, 2023; Alowedi et al., 2023). El-Farahaty and Alwazna (2024), for example, point out the low use of target oriented (TO) strategies in subtitling; a finding that contrasts with the heavy reliance on TO strategies by the three HLs reported in this study. Future AI developments should focus on improving cultural adaptability, and human lexicographers might benefit from leveraging AI tools to balance comprehensiveness, efficiency, and cultural appropriateness.

V. CONCLUSION

Based on the received wisdom and documented research on AI-powered translation tools, this study set out to test two hypotheses: GPT and GG would omit (delete) Arabic collocations and cultural references when translating into English and would most likely face difficulties in interpreting and effectively translating such Arabic expressions. The results of this study challenge both hypotheses. They reveal that the two AI tools of GPT and GG managed to generate translations that could easily compete with human lexicographers (HL1, HL2 and HL3). Contrary to expectations, AI-tools did not employ omission (deletion) at all as a strategy, whereas the three HLs omitted a considerable number of collocations and

cultural references, up to 83% and 90% of the dataset was omitted by HL2 and HL3 respectively. GPT and GG produced complete translations, offering interpretable renderings that, while not precise in rare cases generated by GG, still provide valuable insights for human translators and other language users. At the same time, hypothesis 2 remains partially valid. The results confirm that AI-translation tools still face difficulties in capturing cultural and idiomatic meanings, often defaulting to literal DT or G instead of employing SU or SP, which require deeper cultural adaptation. But even here, both did not generate the usual howlers associated with MT systems like google translate. Furthermore, the three HLs omitted far more of the Arabic expressions when GPT and GG omitted zero. The overuse of O by the three HLs is not helpful for all those who need such information, including 'poor' translation students or general language learners.

This study underscores the evident complementary nature of AI and human lexicographers for translation and other domains and that a hybrid model combining AI with human lexicography could optimize translation quality of bilingual dictionaries. The interplay between AI and human lexicography underscores their complementary strengths and paves the way for more effective human-AI collaboration in translating culturally specific content. While AI excels in completeness and consistency, human lexicographers remain better at contextual and cultural sensitivity. GPT demonstrated greater flexibility than GG, employing CS more frequently to offer culturally relevant renderings and explanations. For example, research should explore interactive AI-assisted lexicography from Arabic to English that would allow human translators and users to edit, adapt, and supplement AI-generated output, ensuring both appropriateness and cultural resonance while leveraging the computing powers of AI-systems.

Ultimately, translation is more than a linguistic task, it is a cultural exchange. As AI continues to evolve, its role should, hopefully, be to support, rather than replace, human lexicographers and translators, ensuring that cross-cultural communication remains effectively and appropriately meaningful in an interconnected world where AI is set to play an increasingly prominent role. A role humans need to accept and learn to adapt to and adopt in all walks of life, including translation and associated disciplines such as lexicography. The integration of context-sensitive neural networks and culturally adaptive translation strategies could significantly bridge the gap between AI-generated and human-molded translations, leading, for example, to effective, appropriate, and useful Arabic to English lexicographical resources.

APPENDIX. ENGLISH TRANSLATIONS (GG, GPT, HL1, HL2, HL3) AND STRATEGIES EMPLOYED

1) R = Retention	4) G = Generalization
2) SP = Specification	5) SU = Substitution
3) DT = Direct translation	6) O = Omission
7) MT = Mistranslation	8) CS = Combination of strategies
ST = Strategy	

No.	Arabic Source Text	GG		GPT		HL1 (MUR)		HL2 (MAW)		HL3 (HAF)	
		Translation	ST	Translation	ST	Translation	ST	Translation	ST	Translation	ST
1	رأس الحكمة	The pinnacle of wisdom	G	The pinnacle of wisdom	G	Fear of God is the beginning of wisdom	SP		O		O
2	أهل اللغة	Linguists, people of language	SU/D T	The people of language / Linguists	DT/SU		O		O		O
3	أم القرى	Mother of cities (often referring to Mecca)	DT/S P	The mother of all cities (Mecca)	DT/SP	Makka	SP		O		O
4	مناهل الأمل	The foundation of hope	MT	The source of hope	DT		O		O		O
5	إخوة السلاح	Brothers in arms	DT	Brothers in arms	DT	Comradeship (-in-arms)	SU		O		O
6	قنبل الحرب	The spark of war	DT	The spark of war	DT		O		O		O
7	علت أسهمه	His stock has risen	DT	His stocks have risen / His value increased	DT/SP		O		O		O
8	مزق ثملهم	They were divided	MT	Tore them apart	DT	Rend	G		O		O
9	فرق ثملهم	They were separated	MT	Dispersed their unity	DT	Drive a wedge between	SU		O		O
10	خفف الودأ	Lightened the burden	DT	Eased the pressure	DT	To lighten the burden	DT		O		O
11	خفف من غلوانه	Calmed his anger	DT	Moderated his intensity / Calmed him down	DT/SP		O		O		O
12	وحد الكلمة	United in word	MT	United the stance / Unified the word	SP	To unify; to unite	DT		O		O
13	رفع الكلفة	Increased the cost	MT	Removed formalities	DT	To take liberties	G	To make free with Take liberties with	G	To be free with; to take liberties with	G
14	نق طبول الحرب	Beat the drums of war	DT	Beat the drums of war	DT	Beating (the drums)	DT		O		O
15	رجحت الكفة	The scale tipped	DT	The balance tipped	DT	To tip the balance / scales (for)	DT		O		O
16	قنبس عكبان	A contentious issue, a bone of contention	SU	A pretext for conflict (based on a historical event)	SP	A cause for controversy	SU	Bloody shirt	MT		O
17	شعرة معارفة	A very fine distinction, a hair's breadth	SU	The fine thread of diplomacy / Strategic patience	G		O		O		O
18	وأنف الفكر في مهدها	Stifled an idea in its infancy	DT	Killing the idea in its cradle	DT		O		O		O
19	خطاب مفترج	An open letter	DT	An open letter	DT	Open letter	DT		O		O
20	سأقه بلسانه	Scorched him with his tongue	DT	Lash him with words / Verbally attacked him	DT/SP	To scald / smite with one's tongue	DT		O		O
21	ابن المدينة	A native of the city	DT	A city native	DT	Native of a place	G		O		O
22	أبناء الوطن	Sons of the nation	DT	Sons of the nation / Citizens	DT/G		O		O		O
23	ابن الخطيئة	Son of sin	DT	A child of sin (usually refers to an illegitimate child)	DT/SP	Bastard	G		O		O
24	ابن السبيل	A traveler, a wayfarer	DT	A wayfarer / Traveler in need	DT/SP	A traveler or Wayfarer	DT	Wayfarer, traveler, passer-by, walker, vagabond, wanderer, tramp, hobo, vagrant	DT/S P		O
25	بيت الشباب	Youth hostel	DT	A youth hostel	DT	Youth hostel	DT		O		O
26	بيت دمار	Brothel	SU	A brothel	SU		O	brothel, bordello, bawdy house, whorehouse, house of prostitution	SU	Brothel	SU
27	بيت المساكين	Nursing home	DT	A retirement home / Elderly care home	DT/SP		O		O		O
28	بيت الزوجية	Marital home	DT	The marital home	DT	Marital house; conjugal home	DT/ SU	Marital house, conjugal home	DT/S U	Conjugal home	SU
29	بيوت الله	Houses of God (mosques)	DT/S P	Houses of God (usually refers to mosques)	DT/SP	Mosques	SP		O		O
30	بد الأوهام	Dispelled illusions	DT	Dispelled illusions	DT	To drive away (bad thoughts)	SP		O		O

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An Analysis of Conceptualization of Inflation in Vietnamese Economic Discourse

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Abstract—This study investigates how Vietnamese economic discourse conceptualizes inflation through the source domain of a physical object. Using the framework of Conceptual Metaphor Theory (Lakoff & Johnson, 1980) and adopting a Critical Metaphor Analysis approach (Charteris-Black 2005, 2014), the study examines a corpus of 281 metaphorical expressions extracted from economic discourse in Vietnamese online newspapers between 2011 and 2025. The findings reveal two prominent derived metaphors: ‘INFLATION IS A MOVING OBJECT’ and ‘INFLATION IS A BURNING OBJECT.’ These metaphors play an important role in helping the public comprehend fundamental aspects of inflation by linking this abstract economic phenomenon with universal embodied experiences. Beyond their cognitive function, such metaphors function as strategic discursive tools for shaping public views, emotional responses, and expectations toward macroeconomic policies. The study contributes to cross-linguistic research on economic metaphors and offers insights into the ideological functions of discourse. It also suggests pedagogical applications for teaching media and journalism language as well as teaching Vietnamese for specific purposes.

Index Terms—cognitive linguistics, metaphor of inflation, Vietnamese economic discourse, Vietnamese media

I. INTRODUCTION

Conceptual Metaphor Theory (CMT) is one of the most prominent approaches within cognitive semantics, a major branch of cognitive linguistics. Initiated by George Lakoff and Mark Johnson, this theory proposes that metaphor is not merely a rhetorical or linguistic phenomenon but a fundamental cognitive process that enables humans to conceptualize, understand, and talk about the world through systematic mappings across conceptual domains (Lakoff & Johnson, 1980). The simplified model of a conceptual metaphor is as follows: ‘TARGET DOMAIN IS/AS SOURCE DOMAIN.’ The target domain is frequently more abstract, whereas the source, which is employed to understand the target, is more concrete, physical, and typically directly connected to human experiences in the physical world. Lakoff and Johnson also distinguished conceptual metaphors and metaphorical expressions. The conceptual metaphor is a conceptual thinking mechanism (meaning it only exists within the human mental world), while metaphorical expressions are the linguistic manifestation that reveals the existence of the conceptual metaphor. Metaphorical expressions contain metaphorically expressed words (also known as metaphorical units or metaphorical items) that present aspects of the source domain. Thus, scrutinizing metaphorical language is an effective way to interpret the conceptual thinking patterns of language users.

One of the most salient economic phenomena frequently conceptualized through metaphor is inflation - a recurring issue in many countries, directly affecting the trajectory of economic development, monetary policies, and the quality of life of citizens, particularly those in low-income groups. In the Vietnamese context, inflation is not only a main macroeconomic concern closely governed by the government but also a recurring topic in public discourse, especially on Vietnamese online news platforms. In these media discourses, inflation is often described metaphorically. From the perspective of Conceptual Metaphor Theory, such metaphorical expressions do not merely reflect but actively shape the way Vietnamese people understand and evaluate this economic phenomenon. Thereby, metaphors of inflation play an important role in constructing public understanding, authorizing policies, and influencing social views toward economic and financial issues.

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Globally, various research has applied CMT to analyze economic metaphors across different languages such as English (Greco, 2009; Langer, 2015; Pang, 2021), Chinese (Hu & Xu, 2017), Malaysian (Mahmood et al., 2013), Serbian (Silaški & Đurović, 2010a), and so on. Several studies have explored metaphorical conceptualizations of inflation in English economic discourses (e.g., Hu & Chen, 2015; Silaški & Đurović, 2010b). However, there remains a lack of research on the conceptualization of inflation in Vietnamese economic discourse. This paper seeks to identify and examine the conceptual metaphors of inflation used in Vietnamese economic discourse published on major online news platforms between 2011 and 2025. Then, it aims to illuminate cognitive and social functions of inflation metaphors as well as their important role in online Vietnamese media.

II. LITERATURE REVIEW

In numerous international studies, the conceptual metaphors of inflation have attracted considerable scholarly attention, both in the analysis of everyday language and in economic discourse.

Lakoff and Johnson (1980) identified common conceptual metaphors of inflation used in everyday English language, such as 'INFLATION IS A SUBSTANCE,' 'INFLATION IS AN ENTITY,' and 'INFLATION IS AN ADVERSARY,' in their seminal work 'Metaphors we live by.' These metaphors show how more tangible source domains are used to metaphorically express the target domain 'INFLATION'.

Several studies have focused on identifying the cognitive models of inflation in English corpora, including Silaški and Đurović (2010b), Hu and Chen (2015), and Hu and Liu (2016). These studies have identified a variety of source domains that are employed to conceptualize different aspects of the target domain 'INFLATION'.

In their study titled 'CATCHING INFLATION BY THE TAIL - Animal metaphoric imagery in the conceptualisation of INFLATION in English,' Silaški and Đurović (2010b) investigated metaphorical thinking patterns of inflation in public economic discourse such as newspapers, magazines, and websites. They discovered the conceptual metaphor 'INFLATION IS A FEROCIOUS ANIMAL,' which depicts inflation as a dangerous and aggressive monster that threatens economic stability.

Hu and Chen (2015) used the COCA (Corpus of Contemporary American English), which comprises more than 450 million words covering the period 1990-2012, to examine metaphorical expressions of inflation. Their findings revealed a significant number of conceptual metaphors, such as 'INFLATION IS FIRE,' 'INFLATION IS LIQUID,' 'INFLATION IS A PLANT,' 'INFLATION IS AN ANIMAL,' 'INFLATION IS A DISEASE,' 'INFLATION IS WARFARE,' 'INFLATION IS A RACER,' 'INFLATION IS A MACHINE,' and 'INFLATION IS AN ENTITY.' These metaphors indicate the negative impact of inflation and its perceived threat to both citizens' living standards and national economies. The study also suggested the pedagogical implications, arguing that metaphor analysis can be integrated into economics education to help students better understand inflation as a complex and dynamic concept. Additionally, it also emphasized the use of conceptual metaphors for vocabulary acquisition and thematic comprehension in economics-related English training.

Hu and Liu (2016) extended the work of Hu and Chen (2015) by incorporating a diachronic perspective into the analysis of inflation metaphors. Their study utilized the TMC (TIME Magazine Corpus), which contains 100 million words published between 1923 and 2006, to identify metaphorical expressions of inflation. By comparing these expressions with corresponding historical economic data, the authors emphasize the significance of historical context in interpreting economic metaphors. While confirming many of the conceptual metaphors identified by Hu and Chen, the study provided frequency data within the corpus and focused specifically on temporal variations in metaphor use. Their findings confirmed the dominance of organic and mechanical metaphors of inflation across different periods, revealing shifts in metaphorical framing that aligned with broader economic and political changes.

Fuertes-Olivera and Sacristán (2001) examined metaphors of inflation in English economics textbooks and analyzed how these metaphors were translated into Spanish. Their study focused on the decision-making processes of translators when handling metaphorical expressions. They demonstrated that a translator's socio-cultural knowledge can shape metaphorical mappings and, in some cases, lead to the creation of new conceptualizations. The authors confirmed that translation practices - particularly in specialized domains such as economics - can greatly benefit from an informed application of conceptual metaphor theory.

In a related study, Sacristán (2009) presented a metaphor-based translation method for teaching conceptual metaphors in LSP (Language for Specific Purposes) classrooms. Drawing on earlier studies on the topic, she demonstrated how such inflation metaphors can be employed as pedagogical tools in teaching business English, especially in contexts requiring cross-linguistic and cross-cultural competency.

Taken together, these studies have largely focused on three main areas:

- The identification of cognitive models used to conceptualize inflation;
- The impact of historical and political context on metaphor use during times of economic crisis;
- The role of conceptual metaphors in translation studies and LSP pedagogy, especially for economic discourse.

However, until now, no in-depth study has examined how inflation is metaphorically conceptualized in Vietnamese economic discourse. This gap provides the rationale for carrying out this study. Adopting the Conceptual Metaphor Theory developed by Lakoff and Johnson (1980), the study works towards the following three main goals:

1. Identify the conceptual metaphors of inflation and analyze their cross-domain mapping structure in Vietnamese economic discourse.
2. Interpret and explain the cognitive and social impact functions of these inflation metaphors as they appear in Vietnamese economic discourse.
3. Discuss the role of Vietnamese metaphors of inflation in promoting the effectiveness of economic media discourse on inflation and anti-inflation policies.

III. RESEARCH METHODOLOGY

A. Data Collection

This study investigates the conceptualization of inflation in Vietnamese economic discourse based on self-compiled data of 320 online news articles published between 2011 and 2025. The data were sourced from five major Vietnamese online newspapers: *dantri.com.vn*, *tuoitre.vn*, *vtv.vn*, *tapchitaichinh.vn*, and *vneconomy.vn* - widely circulated platforms known for their high readership and accessible writing styles that closely resemble daily language. Articles were selected using the Vietnamese keyword 'lạm phát' (inflation) through the internal search engines of each news website. They fall into various genres such as policy analysis, economic commentary, financial reporting, and business news. Metaphorical expressions about inflation were extracted from the article texts and included in the conceptual metaphor identification process.

B. Metaphorical Identification Procedure

To identify metaphorical expressions, this study uses the 'Metaphor Identification Procedure' (MIP) developed by the Pragglejaz Group (2007). This method has the following basis: 'Metaphorical meaning in usage is indirect meaning: it arises out of a contrast between the contextual meaning of a lexical unit and its more basic meaning, the latter being absent from the actual context but observable in others' (Steen et al., 2010, p. 6). According to Pragglejaz Group (2007), the procedure consists of the following three basic steps:

1. Read the entire text to gain a general understanding of its meaning;
2. Identify all lexical items in the text;
3. For each lexical unit, determine its basic meaning (usually more concrete, human-oriented, related to bodily action, and historically older) and its contextual meaning as it appears in the text. If the contextual meaning contrasts with the basic meaning but can be understood in comparison with it, then the lexical unit is marked as metaphorical (as cited in Nguyen, 2025).

Consider the following example:

Thời điểm những năm tám mươi ấy, tốc độ lạm phát của các nước châu Phi cũng là hai con số, ở châu Mỹ Latinh cũng là ba con số. (<https://dantri.com.vn>, 23/05/2022)

[In the 1980s, the pace of inflation in African countries was in double digits, while in Latin America it reached triple digits.] (<https://dantri.com.vn>, 23 May 2022)

The sentence describes the situation of inflation in African and Latin American countries during the 1980s. In this case, inflation is measured by its "pace," and its severity is expressed through numerical values. Lexical items include 'thời điểm, những năm tám mươi, ấy, tốc độ, lạm phát, các, nước, châu Phi, cũng, là, hai con số, ở, châu Mỹ Latinh, cũng, là, ba con số.' Among these lexical items, the word 'tốc độ' (pace) is particularly noteworthy. The word 'tốc độ' (pace) basically refers to the speed at which an object moves. However, in the sentence above, it is used to describe the rate at which inflation increases. Thus, the phrase 'tốc độ lạm phát' (pace of inflation) functions as a metaphorical unit. At this point, the sentence can be identified as a metaphorical expression of the conceptual metaphor 'INFLATION IS A MOVING OBJECT'.

C. Analytical Framework

After being identified through the MIP, metaphorical expressions are categorized into conceptual metaphors following the pattern 'INFLATION IS A,' where A represents the source domain. To extend the analysis beyond the level of linguistic description, this study employs the framework of Critical Metaphor Analysis (CMA), suggested by Charteris-Black (2005, 2014). Critical Metaphor Analysis consists of three stages: identification, interpretation, and explanation. The first stage identifies and classifies metaphorical keywords in the text, determines whether their meanings are metaphorical or literal, and infers broader conceptual metaphors. The second stage interprets these metaphors to discover cognitive models and structures that shape the way experiences are conceptualized. The final stage explains the social and ideological motivations behind the use of metaphors. Using the combination of the MIP and CMA analytical frameworks allows the study to explore not only the cognitive functions of inflation metaphors but also their social impact in forming attitudes, beliefs, and expectations for the Vietnamese public.

IV. RESEARCH FINDINGS

Through investigating the corpus of articles, we discovered 281 linguistic expressions with 38 metaphorically expressed words belonging to the conceptual metaphor 'INFLATION IS AN OBJECT' in Vietnamese economic

discourse. Upon classification and labeling, it is shown that the source domain ‘AN OBJECT’ branches into two lower-level source domains: ‘A MOVING OBJECT’ and ‘A BURNING OBJECT.’ This hierarchy results in two derived metaphors, illustrated in the figure below:

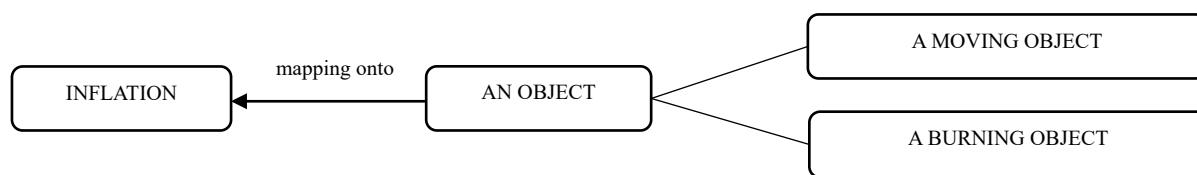


FIGURE 1. HIERARCHICAL STRUCTURE OF THE CONCEPTUAL METAPHOR ‘INFLATION IS AN OBJECT’

The two derived source domains (‘A MOVING OBJECT’ and ‘A BURNING OBJECT’), which are closely related to physical human experience, are mapped onto the target domain ‘INFLATION.’ Accordingly, in Vietnamese economic discourse, there exist two lower-level conceptual metaphors: ‘INFLATION IS A MOVING OBJECT’ and ‘INFLATION IS A BURNING OBJECT.’ Due to the cross-domain mapping mechanisms, the abstract concept of inflation is conveyed clearly and vividly. However, the distribution of metaphorical expressions and lexical items associated with these metaphors is uneven. Table 1 presents the frequency of metaphorical expressions and lexical items found in each metaphor type:

TABLE 1
DISTRIBUTION OF SUBMETAPHORS OF THE CONCEPTUAL METAPHOR ‘INFLATION IS AN OBJECT’

No.	Submetaphors of the conceptual metaphor INFLATION IS AN OBJECT	Metaphorical expressions	Metaphorical items
1	INFLATION IS A MOVING OBJECT	136	30
2	INFLATION IS A BURNING OBJECT	145	8
TOTAL		281	38

The statistics demonstrate that while the metaphor ‘INFLATION IS A BURNING OBJECT’ generates more metaphorical expressions, they are concentrated in fewer lexical units than ‘INFLATION IS A MOVING OBJECT.’ It is obvious that the scope of coverage and the richness of the mapping structure of each metaphor differ within Vietnamese economic discourse.

A. Conceptual Metaphor ‘INFLATION IS A MOVING OBJECT’

When projecting the source domain ‘A MOVING OBJECT’ onto the target domain ‘INFLATION,’ Vietnamese economic discourse mainly uses four typical source domain attributes, including ‘velocity of a moving object,’ ‘direction of a moving object,’ ‘controlling the movement of a moving object,’ and ‘characteristics of the movement path.’ The ontological mapping model is reproduced in Table 2 below:

TABLE 2
CONCEPTUAL MAPPINGS FROM THE SOURCE DOMAIN ‘A MOVING OBJECT’ TO THE TARGET DOMAIN ‘INFLATION’

Source domain: A MOVING OBJECT	mapping onto	Target domain: INFLATION
Velocity of a moving object	→	Development of inflation
Direction of a moving object	→	Trend of inflation
Controlling the movement of a moving object	→	Controlling the degree of inflation
Characteristics of the movement path	→	Characteristics of the process of controlling inflation

The ontological correspondences between the source and target domains, as illustrated in Table 2, allow for various aspects of inflation - such as its degree, trends, progression, and control process - to be described in a clear and engaging manner in Vietnamese economic discourse.

(a). Metaphorical Mapping From ‘VELOCITY OF A MOVING OBJECT’ Onto ‘DEVELOPMENT OF INFLATION’

Metaphorical lexical items associated with the source domain’s attribute ‘VELOCITY OF A MOVING OBJECT’ are frequently used to indicate the target domain’s attribute ‘DEVELOPMENT OF INFLATION’ in Vietnamese economic discourse. These include ‘tốc độ’ (pace), ‘tăng tốc’ (accelerate), ‘giảm tốc’ (decelerate), ‘đà tăng’ (upward momentum), ‘đà giảm’ (downward momentum), ‘bứt tốc’ (suddenly accelerate), ‘tốc độ chóng mặt’ (dizzying acceleration), and ‘chậm lại’ (slow down). The metaphorical image of a moving object whose velocity fluctuates - at times rapidly, at other times decelerating or slowing down, at times gaining upward momentum, and at other times losing momentum - is used in Vietnamese economic news to concretize inflation, a complex and abstract phenomenon rooted in macroeconomic processes. The use of metaphorical items allows Vietnamese readers to visualize more intuitively the variability and continuity of inflation, facilitating their understanding of its severity or manageability within different national economies. The following are illustrative examples of this metaphorical structure:

1. **Tốc độ tăng lạm phát tiếp tục chậm lại** khiến giới đầu tư kỳ vọng Cục Dự trữ Liên bang Mỹ (Fed) sẽ nới lỏng lập trường chính sách tiền tệ cứng rắn được giữ vững trong cả năm 2022. (<https://dantri.com.vn>, 15/02/2023)

- [The pace of inflation has continued to **slow down**, leading investors to expect that the U.S. Federal Reserve will ease its hardline monetary stance that was maintained throughout 2022.] (<https://dantri.com.vn>, 15 February 2023)
2. **Lạm phát sẽ *bứt tốc* trong năm 2016.** (<https://dantri.com.vn>, 3/12/2015)
[Inflation is expected to **suddenly accelerate** in 2016.] (<https://dantri.com.vn>, 3 December 2015)
 3. **Lạm phát tại Nhật *giảm tốc* trước thêm cuộc họp của ngân hàng trung ương.** (<https://vtv.vn>, 21/04/2024)
[Inflation in Japan **decelerated** ahead of the central bank's policy meeting.] (<https://vtv.vn>, 21 April 2024)
 4. **Lạm phát cơ bản tại thủ đô Tokyo của Nhật Bản đang *trên đà tăng* lên trong tháng 8 và đây là nền tảng để kích thích Ngân hàng Trung ương Nhật Bản (BOJ) tăng lãi suất.** (<https://vtv.vn>, 30/08/2024)
[Core inflation in Tokyo is **on an upward momentum** in August, forming a basis for the Bank of Japan (BOJ) to raise interest rates.] (<https://vtv.vn>, 30 August 2024)
 5. **Bà cho hay các nhà hoạch định chính sách của ECB cần có thêm bằng chứng cho thấy tăng trưởng tiền lương đang *chậm lại* trước khi chắc chắn rằng lạm phát đang *trên đà giảm* xuống mức mục tiêu.** (<https://vtv.vn>, 28/11/2023)
[She stated that European Central Bank policymakers need further evidence that wage growth is slowing before they can be confident that **inflation is on a downward momentum** toward the target.] (<https://vtv.vn>, 28 November 2023)

In examples 2 and 4, metaphorical terms like ‘*bứt tốc*’ (suddenly accelerate) and ‘*trên đà tăng*’ (on an upward momentum) all reveal a concerning state of inflation marked by rapid, frequently uncontrollable escalation. According to these expressions, inflation is depicted as a moving object gaining momentum. Once it reaches a certain threshold, it becomes harder for policymakers to control. On the contrary, metaphorical items such as ‘*chậm lại*’ (slowdown), ‘*giảm tốc*’ (decelerate), and ‘*trên đà giảm*’ (on a downward momentum) (in examples 1, 3, and 5) imply that inflation is improving, signaling optimistic prospects for the economy.

The metaphorical mapping - from the ‘VELOCITY OF A MOVING OBJECT’ onto ‘DEVELOPMENT OF INFLATION’ - enables Vietnamese readers to recognize inflation as a dynamic process with constant fluctuations in its level and severity rather than a static or unchanging economic phenomenon. This cognitive model also implies that inflation is not self-regulating but highly susceptible to external forces, such as geopolitical conflicts (e.g., war), commodity price volatility, or government intervention. Accordingly, Vietnamese economic discourse can enrich public understanding that inflation can be actively steered, slowed, or accelerated depending on economic goals. This metaphorical structure can reinforce the perception of inflation as manageable through policy while simultaneously highlighting its potential volatility and inherent risk if left unchecked.

(b). *Metaphorical Mapping From ‘DIRECTION OF A MOVING OBJECT’ Onto ‘TREND OF INFLATION’*

In Vietnamese economic discourse, the source attribute ‘DIRECTION OF A MOVING OBJECT’ is adopted to project onto the ‘TREND OF INFLATION.’ Metaphorically expressed words such as ‘*đi ngang*’ (moving sideways), ‘*dao động*’ (fluctuate), ‘*quay trở lại*’ (returning), ‘*đi đúng hướng*’ (move in the right direction), ‘*quay đầu*’ (reverse), ‘*vượt xa mục tiêu*’ (far exceed the target), ‘*xa rời mục tiêu*’ (diverge from the target), ‘*tiến gần hơn đến mục tiêu*’ (approach the target), and ‘*tiến tới mức mục tiêu*’ (move toward the target) are commonly used to express the trajectory and evolution of inflation over time. These lexical units assist Vietnamese readers in determining whether inflation is progressing in a desirable direction (i.e., toward policy goals) or deviating from it.

Metaphorical expressions that involve the source domain ‘DIRECTION OF A MOVING OBJECT’ have played a central role in depicting inflation as a physical entity moving over an economic map – a map with defined policy objectives. When inflation remains stable or changes slightly within a controllable range, it is portrayed through expressions such as ‘*đi ngang*’ (move sideways) or ‘*dao động*’ (fluctuate), which suggest gentle horizontal or vertical movements without a clear directional trend:

6. **Bà Lagarde đã cảnh báo *lạm phát sẽ dao động* quanh mức hiện tại trong thời gian tới.** (<https://vtv.vn>, 3/01/2025)
[Ms. Lagarde warned that **inflation would fluctuate** around its current level in the coming period.] (<https://vtv.vn>, 3 January 2025)
7. **Với thực tế giá năng lượng và thực phẩm toàn cầu thấp hơn nhiều so với trước, các chuyên gia kinh tế kỳ vọng *lạm phát tiêu dùng* tại Trung Quốc tiếp tục *đi ngang* trong nhiều tháng tới.** (<https://dantri.com.vn>, 5/08/2023)
[With global energy and food prices significantly lower than before, economists expect **consumer inflation** in China to continue **moving sideways** over the next few months.] (<https://dantri.com.vn>, 5 August 2023)

When inflation progresses in line with government policy directions or public expectations, it is conceptualized as a moving object that ‘*đi đúng hướng*’ (move in the right direction) and ‘*tiến tới mức mục tiêu*’ (move toward the target):

8. **Các chuyên gia tin rằng những số liệu của tháng 5, mà mới nhất là giá cả PCE, đã cho thấy rằng *lạm phát đang thực sự đi đúng hướng* về mục tiêu 2% mà FED kỳ vọng.** (<https://vtv.vn>, 29/06/2024)
[Experts believe that the latest figures for May, particularly the PCE index, show that **inflation is truly moving in the right direction** toward the Fed's 2% target.] (<https://vtv.vn>, 29 June 2024)
9. **Biên bản cho biết nếu dữ liệu đúng như dự đoán rằng *lạm phát sẽ tiến tới mức mục tiêu 2%*, trong khi việc làm vẫn ổn định, thì ‘việc chuyển dần sang lập trường chính sách trung lập hơn theo thời gian có thể sẽ là phù hợp.’** (<https://vtv.vn>, 28/11/2024)

[The minutes stated that if the data confirms that **inflation is moving toward the 2% target** while employment remains stable, ‘a gradual shift toward a more neutral policy stance over time may be appropriate.’] (<https://vtv.vn>, 28 November 2024)

By contrast, when inflation moves beyond the boundaries of control, it is framed as ‘xa rời mục tiêu’ (diverge from the target) or ‘vượt xa mục tiêu’ (run far beyond the target):

10. *Sẽ rất khó cho Fed cắt giảm lãi suất để ngăn đà suy yếu của thị trường lao động nếu **lạm phát** tăng trước và **vượt xa mục tiêu** hơn cả tỷ lệ việc làm.* (<https://dantri.com.vn>, 12/05/2025)

[It will be extremely difficult for the Federal Reserve to cut interest rates to slow the momentum of labor market decline if **inflation** gains pace ahead and **runs far beyond the target** - outpacing even employment growth.] (<https://dantri.com.vn>, 12 May 2025)

11. *Báo cáo mới nhất càng làm tăng thêm lo ngại cho Fed khi **lạm phát** tăng trở lại và **dần xa rời mục tiêu 2%**.* (<https://vtv.vn>, 14/11/2024)

[The latest report adds to the Fed’s concerns as **inflation** begins to rise again and increasingly **diverges from the 2% target**.] (<https://vtv.vn>, 14 November 2024)

Additionally, when inflation changes direction opposite to the previous trend, the metaphorical item ‘quay đầu’ (reverse or turn around) is often employed - suggesting a sudden shift in trajectory:

12. ***Lạm phát** ở Mỹ đã **quay đầu** giảm kể từ giữa năm ngoái.* (<https://dantri.com.vn>, 27/08/2023)

[Since mid-last year, U.S. **inflation** has **turned around** and **entered a downward trajectory**.] (<https://dantri.com.vn>, 27 August 2023)

These examples show that in Vietnamese economic discourse, inflation is cognitively mapped onto spatial movement, where its direction signals progress, deviation, or policy alignment. Framing inflation as a moving object enables the Vietnamese public to better visualize its trajectory and assess whether it is advancing positively or spiraling out of control in relation to economic targets.

(c). *Metaphorical Mapping From ‘CONTROLLING THE MOVEMENT OF A MOVING OBJECT’ Onto ‘CONTROLLING THE DEGREE OF INFLATION’*

Metaphorical phrases such as ‘thúc đẩy lạm phát gia tăng’ (propel inflation upward), ‘làm giảm tốc’ (slow inflation down), ‘kìm hãm lạm phát’ (curb/brake inflation), ‘kìm đà lạm phát’ (restrain the momentum of inflation), ‘giữ lạm phát ở mức’ (keep inflation at), ‘đưa lạm phát về ngưỡng/về mức’ (bring inflation to the threshold/target), or ‘đưa lạm phát xuống mức’ (bring inflation down to the threshold/target) provide vivid linguistic representations of governmental interventions in the management of inflation. Inflation is expressed as a moving object, while the government performs the role of an agent or operator actively steering its course. The ontological correspondence between the source attribute “controlling the movement of a moving object” and the target attribute “controlling the degree of inflation” existing in Vietnamese economic discourse helps reinforce the image of a government in command - capable of steering inflation toward or away from desirable outcomes.

Inflation can be ‘thúc đẩy gia tăng’ (propel upward) through governmental actions such as low-interest-rate policies or fiscal stimulus packages aimed at boosting consumer demand:

13. *Chính sự kết hợp của nhiều yếu tố đã **thúc đẩy lạm phát gia tăng**, trong đó bao gồm chính sách lãi suất thấp của Cục Dự trữ Liên bang (Fed) và các biện pháp kích thích nhu cầu tiêu dùng của người Mỹ được Quốc hội thông qua.* (<https://dantri.com.vn>, 13/02/2022)

[A combination of various factors **has propelled inflation upward**, including the Federal Reserve’s low-interest-rate policy and consumer demand stimulus measures approved by Congress.] (<https://dantri.com.vn>, 13 February 2022)

Hyperinflation may be slowed down or brought under control through economic policy interventions. Linguistic units such as ‘làm giảm tốc lạm phát’ (slow inflation down), ‘kìm hãm lạm phát’ (curb inflation), ‘kìm đà lạm phát’ (restrain the momentum), ‘giữ lạm phát ở mức’ (keep inflation at), and ‘đưa lạm phát xuống mức mục tiêu’ (bring inflation back/down to a target) all evoke the act of guiding a moving object - reflecting inflation as a phenomenon that can be managed and governed by policymakers. Consider the following examples:

14. *Tuy nhiên, ở một số nước, áp lực lạm phát đang rất lớn; ở những nước như vậy thì tôi muốn nhấn mạnh rằng rất nhiều chính sách **kìm hãm lạm phát** đang được thực hiện và chúng tôi đánh giá những chính sách này đưa ra kịp thời, đúng lúc.* (<https://dantri.com.vn>, 7/05/2011)

[However, in some countries, inflationary pressure remains extremely high. In such cases, I would like to emphasize that a wide range of policies aimed at **curbing inflation** are being implemented, and we consider these measures to be timely and appropriate.] (<https://dantri.com.vn>, 7 May 2011)

15. *Lãi suất 10 năm đã chạm đáy vào năm 2020 và tăng liên tục, cho thấy dấu hiệu của gia tăng lạm phát, nhưng phải mãi tới 2022 Fed mới vào cuộc để nâng lãi suất ngắn hạn nhằm **kìm đà lạm phát**.* (<https://vtv.vn/>, 26/11/2024)

[The 10-year interest rate bottomed out in 2020 and then continued to rise, signaling mounting inflationary pressure. However, it was not until 2022 that the Federal Reserve intervened by raising short-term interest rates to **restrain the momentum of inflation**.] (<https://vtv.vn/>, 26 November 2024)

16. Ông Lane cho biết, việc trở lại mục tiêu này vẫn chưa thể chắc chắn; đặc biệt, lập trường tiền tệ sẽ phải duy trì ở phạm vi hạn chế trong một thời gian cần thiết để thúc đẩy quá trình **đưa lạm phát trở lại mục tiêu** đúng thời điểm. (<https://vtv.vn>, 25/08/2024)

[Lane noted that returning to this target remains uncertain. Monetary policy will need to stay restrictive for a necessary period to support efforts in **bringing inflation back to target** at the right time.] (<https://vtv.vn>, 25 August 2024)

These examples (14, 15, and 16) reveal two distinct modes of inflation control: reversing the upward trajectory of inflation and redirecting it downward, or applying regulatory tools to restrain or stabilize the rate of inflation. Metaphorical mapping in verbal terms truly made inflation-controlling activities more tangible and visual. By using the mapping, the authors of articles enhance Vietnamese readers' understanding of the governable property of inflation. Readers can be confident that inflation can be fully operated, oriented, and adjusted in the process of governments running the economy. Moreover, this metaphorical framing can also reinforce the legitimacy of state intervention and foreground the government's role as a rational agent actively steering the economic trajectory in times of turbulence.

(d). *Metaphorical Mapping From 'CHARACTERISTICS OF THE MOVEMENT PATH' Onto 'CHARACTERISTICS OF THE PROCESS OF CONTROLLING INFLATION'*

The conceptual metaphor 'INFLATION IS A MOVING OBJECT' is further elaborated through ontological correspondence between the 'CHARACTERISTICS OF THE MOVEMENT PATH' (source domain's attribute) and the 'CHARACTERISTICS OF THE PROCESS OF CONTROLLING INFLATION' (target domain's attribute). Metaphorical items such as 'con đường chông gai' (a thorny path), 'tiền trình gập ghềnh và thử thách' (a bumpy and challenging process), 'chặng đường dài và thử thách' (a long and arduous journey), and 'chặng đường dài' (a long road) are employed to underscore and vividly articulate the difficulties and obstacles that governments come across in their attempts to manage inflation effectively. These metaphorical expressions emphasize the prolonged and often unpredictable nature of inflation control. Rather than portraying inflation control as a straightforward intervention, the mapping pattern conceptualizes it as a journey fraught with uncertainty and hardship - thus legitimizing potential delays, reversals, or policy struggles as inherent to the process.

Through conceptual mappings embedded in metaphorical expressions, the process of controlling inflation in Vietnamese economic discourse is described as a complex and uneven journey, laden with unexpected risks and challenges (see examples 17, 18, and 19). Inflation management is not perceived as an endeavor that yields immediate results, but rather as a prolonged undertaking that demands perseverance and sustained governmental effort. Phrases such as 'con đường chông gai' (a thorny path), 'tiền trình gập ghềnh và thử thách' (a bumpy and challenging process), and 'chặng đường dài' (a long road) not only serve to concretize the obstacles faced by policymakers but also function to point out the necessity of long-term macroeconomic strategies.

17. Theo đó, thống nhất mục tiêu là đảm bảo ổn định giá cả và đưa lạm phát về mức 4%. Báo chí Nga đã gọi đây là **con đường chông gai**, khi lãi suất cơ bản do Ngân hàng Trung ương Nga đặt ra đang ở mức kỷ lục và trở thành chủ đề kinh tế được quan tâm nhất hiện nay. (<https://vtv.vn>, 26/11/2024)

[Accordingly, the agreed-upon goal is to ensure price stability and bring inflation down to 4%. Russian media has described this as **a thorny path**, as the key interest rate set by the Central Bank of Russia remains at a record high, becoming one of the most closely watched economic issues today.] (<https://vtv.vn>, 26 November 2024)

18. Nhìn tổng thể, lạm phát đang tiến dần về mục tiêu dài hạn 2%, dù với một **tiền trình khá gập ghềnh và thách thức**. (<https://vtv.vn>, 15/11/2024)

[Overall, inflation is gradually moving toward the long-term target of 2%, through **a bumpy and challenging process**.] (<https://vtv.vn>, 15 November 2024)

19. Tuy nhiên, FED vẫn cho rằng quá trình đưa lạm phát về mức 2% sẽ còn một **chặng đường dài**. (<https://vtv.vn>, 15/11/2023)

[However, the Federal Reserve maintains that the journey to **bring inflation back to the 2% target will still be a long road** ahead.] (<https://vtv.vn>, 15 November 2023)

This metaphorical mapping facilitates public understanding of the complexity of inflation control while also framing political action as an effortful, ongoing process - thus potentially engendering greater public empathy and patience.

The conceptual metaphor 'INFLATION IS A MOVING OBJECT' originates from the universal human experience of motion in space. The embodied basis of this metaphor is grounded in fundamental image schemas such as 'MOTION' (movement with velocity, direction, and destination), 'FORCE' (forces that promote or inhibit motion), and 'PATH' (the trajectory of movement and characteristics of the journey) (Lakoff, 1987; Lakoff & Johnson, 1999; Kovecses, 2015; Littlemore, 2019). In Vietnamese economic discourse on online news platforms, this metaphor allows the inflation to be conceptualized through concrete and familiar physical experiences of object motion and directional navigation. The mapping of the source domain 'A MOVING OBJECT' onto the target domain 'INFLATION' not only enhances the vividness of linguistic expression but also deepens Vietnamese public understanding of this abstract phenomenon.

B. *Conceptual Metaphor 'INFLATION IS A BURNING OBJECT'*

The experience with burning objects is common and closely related to the subjective impression of heat and light created by fire. This experiential grounding has been used in Vietnamese economic discourse to represent the abstract

notion ‘INFLATION.’ Specifically, the source domain ‘A BURNING OBJECT’ linked to the embodiment of heat is used to infer the target domain ‘INFLATION.’ Three prominent aspects of the source are activated in the cross-mapping mechanism, including ‘the physical state of a burning object,’ ‘the fluctuation of temperature,’ and ‘external actions performed on the burning object.’ These prominent properties not only allow for the articulation of inflation through physical experiences, but more importantly, they actively build cognitive models - constructing new ways of understanding the nature, dynamics, and severity of inflation within public discourse. The metaphorical mappings from the source to the target domain and metaphorical units that carry attributes of the source domain ‘A BURNING OBJECT’ are listed in Table 3 and Table 4 below, respectively:

TABLE 3
CONCEPTUAL MAPPINGS FROM THE SOURCE DOMAIN ‘A BURNING OBJECT’ TO THE TARGET DOMAIN ‘INFLATION’

Source domain: A BURNING OBJECT	mapping onto	Target domain: INFLATION
The physical state of a burning object	→	The progression of inflation
The fluctuation of temperature	→	The fluctuation in the severity of inflation
External actions performed on the burning object	→	Measures taken to respond to or control inflation

TABLE 4
METAPHORICAL ITEMS IN THE CONCEPTUAL METAPHOR ‘INFLATION IS A BURNING OBJECT’

Source domain's attribute (A BURNING OBJECT)	Metaphorical items	Source domain's attribute (A BURNING OBJECT)	Metaphorical items
The physical state of a burning object	<i>bùng lên (flare up)</i> <i>âm i (smolder)</i>	The fluctuation of temperature	<i>tăng nhiệt (heat up)</i> <i>giảm nhiệt / hạ nhiệt (cool down)</i>
External actions performed on the burning object	<i>dập tắt (extinguish)</i> <i>thổi bùng (fan the flames (of inflation))</i>		<i>nóng lên (become hot)</i> <i>dịu đi / dịu xuống (cool down)</i>

A closer look at metaphorical items based on the source property ‘A BURNING OBJECT’ shows a variety of expressions that vividly capture different facets of inflation. For instance:

20. **Lạm phát dễ bùng lên trong tháng 9.** (<https://dantri.com.vn>, 26/07/2013)

[Inflation is likely to flare up in September.] (<https://dantri.com.vn>, 26 July 2013)

In example 20, the verb ‘bùng lên’ (flare up) - typically used to describe the sudden and intense ignition of a fire - is metaphorically employed to indicate a rapid, unexpected, and difficult-to-control rise in inflation. This expression evokes a sense of urgency and potential danger.

21. **Tuy nhiên, nhiều nước châu Á chưa thoát khỏi khó khăn với lạm phát lương thực vẫn đang âm ỉ...** (<https://vtv.vn>, 2/01/2024)

[However, many Asian countries continue to face difficulties as food inflation smolders...] (<https://vtv.vn>, 2 January 2024)

The lexical unit ‘âm ỉ’ (smolders) refers to a fire that continues to burn at a low level and may reignite under certain conditions. Metaphorically, it suggests that inflation, though not currently surging, remains latent and capable of intensifying in response to external triggers. The term emphasizes the importance of maintaining constant vigilance when monitoring inflation.

22. **Fed sẽ trở nên quyết liệt hơn trong việc tăng lãi suất để dập tắt lạm phát.** (<https://dantri.com.vn>, 14/07/2022)

[The Fed is expected to act more aggressively to extinguish inflation.] (<https://dantri.com.vn>, 14 July 2022)

23. **... xung đột khu vực có thể thổi bùng lạm phát trở lại...** (<https://vtv.vn>, 29/01/2025)

[... regional conflict could fan the flames of inflation...] (<https://vtv.vn>, 29 January 2025)

In example 22, the phrase ‘dập tắt lạm phát’ (extinguish inflation) likens inflation to a fire that, if left unchecked, can spread destructively. Here, the metaphor foregrounds the necessity of forceful policy interventions (e.g., interest rate hikes) to fully contain inflation. Similarly, example 23 uses ‘thổi bùng lạm phát’ (fan the flames of inflation) to describe how external shocks - such as geopolitical conflicts - can reactivate and exacerbate inflationary pressures.

24. **Lạm phát đang có dấu hiệu tăng nhiệt...** (<https://tuoitre.vn>, 30/05/2024)

[Inflation is showing signs of heating up...] (<https://tuoitre.vn>, 30 May 2024)

25. **Chi tiêu quá mức là nguyên nhân khiến lạm phát nóng lên.** (<https://vneconomy.vn>, 21/02/2025)

[Overspending caused inflation to become hot.] (<https://vneconomy.vn>, 21 February 2025)

Linguistic expressions such as ‘tăng nhiệt’ (heating up) and ‘nóng lên’ (become hot) in examples 24 and 25 signal the intensification and harmful impacts of inflation on daily life and the economy.

26. **Giá xăng giảm mạnh là yếu tố chính khiến lạm phát hạ nhiệt theo tháng.** (<https://dantri.com.vn>, 13/01/2023)

[A sharp drop in gasoline prices caused monthly inflation to cool down.] (<https://dantri.com.vn>, 13 January 2023)

27. **Lạm phát Mỹ dịu đi...** (<https://vneconomy.vn>, 14/05/2025)

[U.S. inflation has cool down...] (<https://vneconomy.vn>, 14 May 2025)

28. **Lạm phát của Mỹ và châu Âu có dấu hiệu dịu xuống.** (<https://tapchitaichinh.vn>, 17/05/2024)

[There are signs that **inflation** in the U.S. and Europe is **cooling down**.] (<https://tapchitaichinh.vn>, 17 May 2024)

Conversely, lexical items like ‘hạ nhiệt’ (cool down), ‘dịu đi’ (cool down), and ‘dịu xuống’ (cool down) in examples 26, 27, and 28 indicate a relative easing of inflationary pressure, often interpreted as signs of effective policy measures or market corrections.

The conceptual metaphor ‘INFLATION IS A BURNING OBJECT’ is grounded in the universal embodied experience of human beings with heat and fire, perceived primarily through the sense of touch. In everyday life, fire is commonly associated with sensations of heat, danger, rapid spread, and difficulty in control (Kovecses, 2010; Lakoff & Johnson, 1999). For this reason, the source domain ‘A BURNING OBJECT’ serves as an ideal conceptual basis for representing phenomena that are highly risky and have potentially damaging consequences in social and economic contexts. In this metaphorical mapping, salient aspects of a burning object - such as sudden temperature increase, violent flare-ups, lingering smoldering states, widespread damage, and the urgent need for intervention to extinguish the burning object - are projected onto the target domain of inflation. This mapping is motivated by both experiential and socio-semantic correspondences between the threat of a burning object and the threat inflation poses to the economy and societal well-being. Within this metaphorical model, inflation is conceptualized as a burning phenomenon that may flare up, intensify, spread, remain latent, or smolder, and therefore requires tight control, cooling down, or complete extinguishment to ensure economic stability and social welfare. When this metaphor is activated in Vietnamese economic discourse on online news platforms, ‘INFLATION IS A BURNING OBJECT’ not only renders the abstract concept of inflation more concrete and imaginable but also functions as a discursive strategy to shape public perception - emphasizing urgency, risk awareness, and the necessity for decisive government intervention.

Taken together, the conceptual metaphor ‘INFLATION IS A BURNING OBJECT’ demonstrates how Vietnamese economic discourse draws on embodied experience to conceptualize inflation. By aligning the abstract economic phenomenon with familiar sensory experiences of fire and heat, these metaphorical expressions enhance intelligibility as well as lead to emotional responses for the Vietnamese public. They not only provide vivid linguistic representations of inflation’s state, severity, and trajectory but also implicitly shape public perception, concern, and expectations regarding its control and management.

V. DISCUSSION

From a public communication perspective, Vietnamese economic discourse acts as a crucial mediating tool between macroeconomic policy (both national and international) and the general public, including individuals, businesses, and investors. When disseminated through online news platforms, such discourse not only helps explain complex economic phenomena through concrete and embodied expressions but also actively shapes the public’s cognitive framing of domestic and global economic conditions (Fairclough, 1995; van Dijk, 1998).

By employing two derived source domains, ‘A MOVING OBJECT’ and ‘A BURNING OBJECT,’ the authors of online articles enhanced the communicative effectiveness of the inflation issue for the Vietnamese public. With the source ‘A MOVING OBJECT,’ prominent attributes such as velocity, direction, controllability, and the characteristics of movement trajectories enabled the writers to present the trends, developments, and fluctuations of inflation over time, particularly as influenced by governments’ political policies and social factors. Meanwhile, with the source ‘A BURNING OBJECT,’ salient traits such as temperature, burning state, and actions performed on the burning object helped the authors portray the serious impact and dangerous nature of high inflation as well as the urgent need to reduce or eliminate this issue from the economy. Hence, the conceptual metaphor ‘INFLATION IS A MOVING OBJECT’ proves particularly meaningful in discourses aiming to describe the process, trend, and trajectory of inflation control, whereas the metaphor ‘INFLATION IS A BURNING OBJECT’ is highly effective in discourses intended to create a strong impression of urgency, to issue warnings about potential risks, and to signal positive economic prospects to the audience. It is clear that each conceptual thinking model, with its dominant mappings, corresponds to a specific cognitive function. Beyond their cognitive role, these metaphors both perform affective and behavioral functions. By eliciting anxiety over inflation’s harmful effects, they influence economic behaviors such as reducing consumption, increasing savings, and delaying investment decisions. They also foster public support for the government’s long-term inflation-control strategies.

The identification and analysis of the two cognitive models of inflation in this study has contributed to the growing body of research that applies cognitive linguistics and critical discourse analysis, thereby reaffirming key aspects of Lakoff and Johnson’s Conceptual Metaphor Theory and Charteris-Black’s Critical Metaphor Approach. The research results also clarify the role of conceptual metaphors in increasing the communicative effectiveness of Vietnamese economic discourse in the public sphere. Importantly, these insights also carry practical value for teaching media and journalism language as well as teaching Vietnamese for specific purposes. In teaching media and journalism language, the analysis of conceptual metaphors in classroom practice enables students to gain a deeper understanding of the role that metaphor plays in journalistic discourse. Such an approach equips them with the ability to employ metaphorical expressions appropriately, thereby producing messages that are not only clear and coherent but also socially persuasive. Moreover, an awareness of the functions of conceptual metaphors enhances students’ critical thinking skills, allowing them to engage critically with how language impacts public perceptions of economic issues. In the teaching of Vietnamese for economics, particularly for international learners or students majoring in economics, these metaphorical

models serve as a valuable pedagogical resource. The integration of phrases such as ‘lạm phát bứt tốc’ (inflation accelerates), ‘lạm phát hạ nhiệt’ (inflation cools down), or ‘kìm hãm lạm phát’ (to curb inflation) into educational activities enhances learners’ specialized vocabulary and develops their competence in using language effectively within professional and disciplinary contexts.

However, there are still several drawbacks with this study. Firstly, it focuses mainly on Vietnamese and therefore does not provide a comparative perspective on how conceptual metaphors of inflation are employed in other languages. Secondly, empirical research has not yet tested the social impacts of these metaphors in Vietnamese economic discourse, only observing them descriptively. These limitations open avenues for future research. Comparative studies between languages, such as Vietnamese and English, could help reveal both similarities and differences across cultures in the conceptualization of inflation. In addition, experimental or survey-based research involving readers could test the persuasive effects of different metaphorical frames - for example, whether the burning object metaphor evokes stronger emotional and behavioral responses than the moving object metaphor. Such research would further clarify how conceptual metaphors shape economic discourse, influence public attitudes, and affect decision-making in real-world contexts.

VI. CONCLUSION

Through an examination of Vietnamese economic discourse, the study reveals that the conceptual domain ‘AN OBJECT’ is commonly employed by journalists to express inflation. This source domain is further elaborated into two subordinate domains - ‘A MOVING OBJECT’ and ‘A BURNING OBJECT’ - which are metaphorically mapped onto the target domain of ‘INFLATION.’ When projected onto the target domain, these source domains clearly demonstrate the salience of the underlying cognitive model. Grounded in bodily experiences with motion, force, path, and fire, these conceptual metaphors make inflation’s properties more accessible and comprehensible to the public. Beyond their cognitive function, these metaphors greatly influence public views and policy expectations, functioning as effective tools for strengthening economic media discourse. The findings carry significant pedagogical implications for language instruction while also inviting further research into cross-cultural metaphor use in economic contexts and experimental studies on the social impacts of metaphorical models under changing economic conditions.

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Assessing Scientific Translation Proficiency in Higher Education Through the Use of Google Translation: Evidence for Developing a Chinese Scientific Translation Curriculum

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Abstract—This study aims to examine and compare the abilities of university students from diverse academic backgrounds—Chinese, Science, Social Science, and Health Science—in translating scientific and technological content from Chinese to Thai. The objective is to assess how disciplinary knowledge influences translation performance in the context of Thailand's increasing economic and educational ties with China. A comparative analysis was conducted using translation tasks assigned to students enrolled in programs related to Chinese, Science, Social Science, and Health Science. Participants were assessed based on criteria such as language proficiency, scientific accuracy, and organizational clarity. The performance of each group was evaluated to identify strengths and gaps related to their respective academic training. The findings revealed that students from Science and Social Science programs outperformed others in Chinese-to-Thai translation tasks. Science students excelled in scientific accuracy and terminology, while Social Science students demonstrated better fluency and structure in written translations. In contrast, students from the Chinese language program showed lower performance in translating scientific content, highlighting a lack of scientific foundation that affected their comprehension and coherence. The study suggests that disciplinary background has a significant impact on translation abilities in science and technology contexts.

Index Terms—machine translation, translation quality, translation assessment, scientific translation, Chinese language

I. INTRODUCTION

The increasing globalization of scientific and technological knowledge necessitates effective cross-lingual communication, highlighting the crucial role of translation in disseminating advancements and fostering international collaboration (Juarez & Kenet, 2018). While English has often been considered the lingua franca of science, relying solely on a single language creates barriers to accessing scientific careers and knowledge, hindering inclusivity and potentially slowing down the global advancement of science (Steigerwald et al., 2022). This situation poses a significant disadvantage for researchers and students from non-English speaking backgrounds, as they must navigate complex scientific literature and contribute to scholarly discourse in a foreign language (Kleidermacher & Zou, 2025; Ramírez-Castañeda, 2020). The dominance of English in scientific publications has led to a scarcity of scientific records in other languages, further reinforcing its role as the primary language for scholarly communication (Navarro et al., 2017). Furthermore, language and cultural barriers present considerable obstacles to international exchange in social sciences, despite advancements in translation technology (Yonezawa, 2012).

Given the limitations of current translation methods, particularly when dealing with scientific and technological content characterized by lexical ambiguity, syntactic complexity, and semantic nuances, it is imperative to investigate the translation abilities of university students from diverse academic backgrounds (Zhao & Wang, 2025). Differences in linguistic structures and cultural contexts between Chinese and Thai, for instance, pose unique challenges for translators, requiring a deep understanding of both languages and cultures. Moreover, specialized knowledge in science and technology is indispensable for accurately conveying the intended meaning of technical texts. The effectiveness of human translation can be amplified through the integration of technology (Shen et al., 2022). It is important to consider that translation is not merely a linguistic exercise but also a cultural one, and problems in translation can arise from failures

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to achieve cultural equivalence (Madkour, 2018). Therefore, it is essential to investigate how students from various academic disciplines, such as Chinese language, Science, Social Science, and Health Science, approach the task of translating scientific and technological content from Chinese to Thai. Differences in training, exposure to scientific concepts, and linguistic proficiency may significantly impact their translation strategies and outcomes.

Evaluating translation competence requires a multifaceted approach that considers linguistic accuracy, technical precision, and cultural appropriateness. In addition to grammatical correctness, translators must ensure that the translated text accurately reflects the scientific concepts and technical details presented in the original text. The study of translation errors made by students reveals persistent challenges and difficulties in translating texts with cultural elements, which validates the importance of integrating specific learning objectives to develop translator competence (Sirinit, 2018). Cultural competence plays a vital role in conveying the intended meaning and avoiding misunderstandings that may arise from cultural differences. Moreover, the evaluation should assess the students' ability to adapt the translated text to the target audience, ensuring that it is accessible and comprehensible to Thai readers with varying levels of scientific literacy. Nguyen and Dao (2020) highlighted the difficulties faced by English majors in assessing the quality of translated texts, including time constraints, non-equivalence between languages, insufficient cultural understanding, and the lack of official frameworks for quality assessment.

By examining and comparing the abilities of students from diverse academic backgrounds, this research aims to identify the specific strengths and weaknesses of each group, shedding light on the factors that contribute to successful translation outcomes. The ultimate goal is to inform the development of targeted training programs and pedagogical strategies that enhance the translation skills of university students, equipping them with the necessary tools to bridge the language gap in scientific and technological communication. The ability to understand nuances, context, and subtleties differentiates human translation from machine translation (Rahmaniah & Anggriani, 2018). The nuances of translating idioms and cultural references, ensuring the translated text resonates with the target audience, require an understanding of cultural contexts (Choi et al., 2012; Naveen & Trojovský, 2024). The integration of technology into translator training programs offers new avenues for enhancing translation skills and preparing students for the demands of the modern translation industry (Lyons, 2016).

II. THEORETICAL FRAMEWORK

To provide a robust foundation for this study, a theoretical framework incorporating key concepts from translation studies, cognitive linguistics, and science communication will be employed. This framework will guide the analysis of translation strategies, error patterns, and the impact of academic background on translation performance. The student agency is central to language teaching and learning, translating a potentially exciting skill in foreign language learning (Gutiérrez, 2020).

A. Translation Studies

Translation studies provide a robust theoretical framework for examining the complexities inherent in translating scientific and technological texts, particularly when dealing with language pairs as typologically distinct as Chinese and Thai. At its core, translation studies seek to understand the multifaceted processes involved in transferring meaning across linguistic and cultural boundaries, acknowledging that translation is not merely a linguistic exercise but a deeply contextualized act of communication (Plyth, 2020). The discipline encompasses a wide range of theoretical perspectives, from linguistic approaches that focus on the structural and semantic equivalences between languages (McGee, 2019) to cultural approaches that emphasize the role of cultural context and ideology in shaping the translation process (Sirinit, 2018). Functionalist theories, for instance, highlight the purpose and intended audience of the translation, arguing that the translator's primary goal should be to produce a text that effectively serves its communicative function in the target culture (Gutiérrez, 2020). Systemic Functional Linguistics, developed by Michael Halliday, offers a framework for analyzing language as a system of choices, where each linguistic feature contributes to the overall meaning and function of the text; SFL can be particularly useful in dissecting the grammatical and lexical differences between Chinese and Thai, and in identifying potential areas of difficulty for translators (Huang & Agbanyo, 2022). Moreover, sociocultural theories of translation emphasize the translator's role as a mediator between cultures, navigating the complex web of social, political, and historical factors that influence the interpretation and reception of texts.

Applying these theoretical lenses to the context of Chinese-to-Thai scientific and technological translation reveals a number of critical considerations. First, the linguistic differences between the two languages pose significant challenges. Chinese, a predominantly isolating language, relies heavily on word order and grammatical particles to convey meaning, while Thai, also an isolating language, employs a different set of grammatical markers and tonal distinctions. These structural dissimilarities can lead to ambiguity and misinterpretations if the translator lacks a deep understanding of both languages' grammatical systems. Furthermore, scientific and technological texts are characterized by their specialized terminology and precise use of language. The accurate translation of technical terms requires not only linguistic competence but also subject matter expertise, as a translator must grasp the underlying scientific concepts to convey them effectively in the target language. In addition, cultural factors play a crucial role in shaping the translation process. Scientific and technological knowledge is not culturally neutral; it is often embedded in specific cultural contexts and reflects the values and assumptions of the society in which it is produced (Sun, 2022). A translator must be aware of these

cultural nuances and adapt the translation accordingly to ensure that it is accessible and relevant to the Thai audience. Finally, the translator's own background and training can significantly influence their approach to translation.

B. Cognitive Linguistics

Cognitive Linguistics provides a complementary theoretical framework for examining the cognitive processes involved in translation, offering insights into how translators mentally represent and manipulate meaning as they move between languages. Unlike traditional linguistic approaches that focus on abstract rules and formal structures, Cognitive Linguistics emphasizes the role of human cognition in shaping language and meaning. Central to this framework are concepts such as conceptual metaphor, image schemas, and mental spaces, which highlight the embodied and experiential basis of language. Conceptual metaphor theory, for example, posits that abstract concepts are often understood in terms of more concrete experiences and that these metaphorical mappings can vary across cultures. Image schemas are basic, recurring patterns of experience, such as CONTAINER, PATH, and FORCE, that provide a foundation for understanding more complex concepts. Mental spaces are dynamic cognitive structures that allow us to represent and reason about different situations, viewpoints, and possibilities (Tairova, 2021). In the context of translation, Cognitive Linguistics suggests that translators do not simply replace words in one language with equivalent words in another; rather, they engage in a complex process of conceptual mapping, transferring meaning from one mental space to another (Massey & Ehrensberger-Dow, 2017). This process involves identifying the relevant conceptual structures in the source text, activating corresponding structures in the target language, and adapting them to fit the specific context and communicative goals. The interrelationship of language and thought serves as a starting point. Cognitive Linguistics views language as providing key insights into cognitive structures and processes, including their experiential basis (Horst, 2020). Embodied cognition, a core tenet of Cognitive Linguistics, emphasizes the role of sensory and motor experiences in shaping our understanding of the world and our use of language (Zhou & Luo, 2024). Cognitive linguistics, with its emphasis on the experiential grounding of meaning, provides a robust framework for examining how individuals understand and communicate through language (Fang, 2014; Pelkey, 2023). Furthermore, linguistic interpretation reveals static and dynamic processes of cognition, shaping both collective and individual knowledge of language speakers (Boldyrev & Dubrovskaya, 2016).

Furthermore, the idea that language might provide insightful observations on human cognition, with language serving as the framework for assessing and refining significant ideas, is implicitly suggested (Cane, 2015). Thinking is more than just abstract reasoning; it also involves cognitive photographs, the building blocks of more complex mental representations (Ding, 2021). Mental imagery and metaphorical thinking both play a role in how we comprehend and convey information, highlighting the creative and flexible nature of human understanding and communication (Ibarretxe-Antuñano, 2013). The capacity to combine language, culture, and computation offers a thorough basis for resolving problems and improving communication in a globalized environment (Kirby, 2013). The use of language to build cognitive images, portray realities, and plan for the future highlights its significance in higher-level thought (Zuberbühler, 2013). The reciprocal link between language and cognition explains our extraordinary capacity for communication and representation.

Furthermore, Cognitive Linguistics posits that language is learned and used dynamically through real-world interactions, moving it beyond the syntax-centric view of Chomskyan linguistics and situating it as an interdisciplinary field that incorporates psychology and philosophy (Zhou & Luo, 2024). This perspective facilitates the study of how the structural features of languages affect cognition, opening up new avenues for studying language change, bilingualism, and cross-cultural communication. The embodied experiences that shape our conceptual understanding are frequently expressed in language (Löffler et al., 2015). It also allows for the investigation into how language affects cognition and how language changes.

III. METHODOLOGY

This research will employ a mixed-methods approach, combining quantitative and qualitative data collection and analysis techniques. To establish the inclusion criteria for selecting sample groups for this study, we will consider the following characteristics: Group 1: Students enrolled in the Chinese language program from Years 1 to 3. The Year 1 sample group completed two introductory Chinese courses and acquired a vocabulary of at least 600 Chinese words. These students can write Chinese characters, read basic pinyin, and understand simple Chinese conversations. Year 2 students completed six intermediate Chinese courses, expanding their vocabulary to at least 1,200 words. They are capable of communicating in everyday situations and translating sentences from Chinese to Thai. Year 3 students completed eight advanced courses, which include topics on Chinese history, culture, and the reading and writing of Chinese texts. They know at least 1,800 Chinese words. Group 2: Science students not enrolled in the General Chinese Language courses from Years 1 to 3. In Year 1, this group studied foundational courses in general mathematics, chemistry, biology, and physics. From Year 2 to Year 3, students continued their studies with lectures and laboratory courses in their respective majors, including mathematics, chemistry, biology, and physics. In Year 3, students also engaged in reading research papers and completed a seminar course. Group 3: Year 2 students of the Health Science program enrolled in General Chinese Language courses. In Year 1, this group studied foundational courses in general mathematics, chemistry, biology, and physics. In Year 2, they completed courses related to their health science major, such as biochemistry, microbiology,

nutrition, public health, and others. Group 4: Students in the Social Science programs, including Law and Political Science, from Years 1 to 3. This group of students did not study any courses related to science but focused solely on Thai and English language-related courses.

Based on the instructions provided for participants in the research project, the research methodology can be outlined as follows: Introduction and explanation, Test procedure, Access to tools, Purpose of the test results, and Permission for future use. This methodology ensures that participants are adequately informed about the research project and their role in it, while also providing clear guidelines for their participation in the test. Additionally, it emphasizes transparency regarding the use of their test results and seeks their consent for future utilization. The consent form is included in Supplemental Material A.

Test and Rubric score for evaluation

The test form was designed for test-takers to translate words, phrases, sentences, and scientific articles from Chinese within 60 minutes, with the option to use Google Translate. The test-takers were asked to provide information regarding their current level of education or the highest educational attainment if not currently studying, their age, and their email address. They were also required to indicate their proficiency level in the Chinese language, ranging from no proficiency to highest proficiency, and whether they had previously studied Chinese. If they had studied Chinese before, they were prompted to specify the period of study. Details of the test form are provided in supplementary material B. The test is divided into 3 parts as follows. Part 1: Translate words or phrases from 20 technical terms in science; Part 2: Translate sentences from 3 sentences in science; Part 3: Translate a short article of "China's New Manned Spacecraft Set to Launch: A Game-Changer in Gravitational Wave Exploration!": It was chosen based on a variety of vocabularies related to science, and the content was of worldwide interest in 2022. The article contains 400 scientific technical terms out of 860 words.

The rubric for evaluating scientific accuracy in translation comprises five levels, ranging from none (no answer), poor, fair, good, very good, and excellent. The topics of evaluation contain 3 parts. In Part 1, which focuses on translating words and phrases, students are assessed based on their use of correct scientific vocabulary. Translation performance was rated on a six-level scale: None (no words or phrases translated), Poor (1–10), Fair (11), Good (12–13), Very Good (14–15), and Excellent (16–20 words or phrases translated). Part 2 assesses sentence translation, with criteria including the correctness of scientific vocabulary usage and overall understanding. Scores vary from using all correct scientific terms and providing accurate overall meaning to significant errors in scientific terminology usage and comprehension difficulty. Translation quality was evaluated on a six-level scale: None (no sentence translated), Poor (incorrect scientific terms and failure to understand the sentence), Fair (more than six errors, partial understanding), Good (3–5 errors, generally understandable), Very Good (1–2 errors with correct use of scientific terms), and Excellent (accurate translation with correct technical terminology throughout). Part 3 is based on the translation of short articles in subsection 5.2.1. Translation quality was assessed on a six-level scale: None (nothing translated), Poor (incorrect scientific terms and lack of sentence comprehension), Fair (many errors with partial understanding), Good (some errors but generally understandable), Very Good (few errors with correct use of scientific terms), and Excellent (completely accurate with correct technical terminology).

The rubric for evaluating translation from Chinese to Thai comprises five levels, ranging from none (no answer), poor, fair, good, very good, and excellent. The topics of evaluation contain 3 parts. In Part 1, which focuses on translating words and phrases, students are assessed based on their use of correct translation to the target language. Translation output was rated on a six-level scale based on the number of words or phrases translated: None (no translation), Poor (1–10 words or phrases), Fair (11), Good (12–13), Very Good (14–15), and Excellent (16–20 words or phrases). Part 2 assesses sentence translation, with criteria including the correctness of scientific vocabulary usage and overall understanding. Scores vary from using all correct scientific terms and providing accurate overall meaning to significant errors in scientific terminology usage and comprehension difficulty. Translation quality was evaluated on a six-level scale: None (no sentence translated), Poor (incorrect scientific terms and failure to understand the sentence), Fair (more than six errors, partial understanding), Good (3–5 errors, generally understandable), Very Good (1–2 errors with correct use of scientific terms), and Excellent (accurate translation with correct technical terminology throughout). Part 3 is based on the translation of short articles in subsection 5.2.1. Translation quality was assessed on a six-level scale: None (nothing translated), Poor (incorrect scientific terms and lack of sentence comprehension), Fair (many errors with partial understanding), Good (some errors but generally understandable), Very Good (few errors with correct use of scientific terms), and Excellent (completely accurate with correct technical terminology).

Students were evaluated across multiple dimensions, ensuring a comprehensive assessment of their translation skills. Each criterion provides specific guidelines, allowing for consistent and fair evaluation. By utilizing this rubric, educators can effectively assess students' translation and language abilities and provide targeted feedback for improvement.

IV. RESULTS AND DISCUSSION

The data collection process commenced in December 2023 and concluded in February 2024. Volunteer students from various academic programs, as specified in the research methodology, were enlisted to participate in the testing. The testing procedures were conducted remotely via online meeting rooms for about one hour, with test proctors initially guiding the examination setup. Subsequently, students were allotted one hour to complete the test, following which they

submitted their answer sheets electronically to the researchers. The purpose of this testing was to evaluate both the scientific accuracy and linguistic correctness of the translations performed by the students. After completing the test, participants were asked the following questions: They answered a question of “Did you use only your knowledge or only Google translator, or a combination of your knowledge and Google translator?”

In data collection, 15 students from the Chinese language program, aged 19 to 21, in their second to third year of undergraduate studies, participated. These students self-assessed their Chinese language proficiency at level 3.1 out of 5, with none having prior experience in Chinese language learning beyond a pre-collegiate level. Among them, 12 students utilized translation tools from Chinese to Thai, followed by self-checking and language refinement, while the remaining 3 students solely relied on translation tools for Chinese to Thai conversion. Thirteen students from the science program, aged 18 to 21 and in their first to third year of studies, participated in the research. These students self-assessed their Chinese language proficiency at level 0.7 out of 5, with two individuals having prior experience in Chinese language learning. Out of the aforementioned group, one student utilized a translation tool from Chinese to Thai and subsequently checked and refined the language by their knowledge. Additionally, the remaining 12 students solely relied on a translation tool from Chinese to Thai.

Seven students from the social sciences program, aged 20 to 21 and in their second to third year of studies, participated in the research. These students self-assessed their Chinese language proficiency at level 0.4 out of 5, with three individuals having prior experience in Chinese language learning. Out of the aforementioned group, one student used a translation tool from Chinese to Thai and then proceeded to check and revise the language by their knowledge. Additionally, six other students solely relied on a translation tool from Chinese to Thai.

The final group comprises two students from the field of health sciences, both aged 20 years, in their 2nd to 3rd year of undergraduate studies. Both students in this group self-assessed their Chinese language proficiency level at 2 out of 5, and both had prior experience studying Chinese. Both students utilized a translation tool from Chinese to Thai and then proceeded to review and revise the language by their knowledge.

Statistical Results

Examples (out of 20) of scientific words and phrases that participants were required to translate are as follows.

Speed	速率	Velocity	速度	Distance	距离
Friction	摩擦力	Work	功	Viscosity	粘度
Ideal gas	理想气体	Degree of freedom	自由度	Projectile motion	抛体运动
Atmospheric pressure	大气压力	Nuclear plant	原子核物理学	Electric current	电流
Heat	热量	Free falling	自由落体	Surface tension	表面张力

After translation, 2 evaluators specialized in the Chinese language and Science evaluated the translations using the rubric scores provided in Appendices C and D. A comparison of scores across the programs is shown in Figure 1.

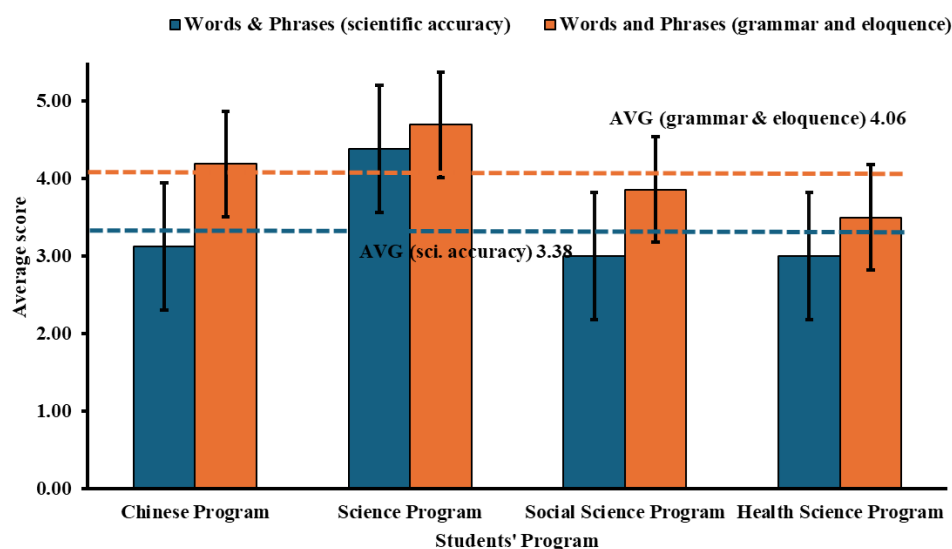


Figure 1. Average Scores From Translating Words and Phrases of Students in the Chinese Program, Science Program, Social Science Program, and Health Science Program, in Comparison of Evaluation on Science Accuracy, Grammar, and Eloquence. All Average (Both Science Accuracy, Grammar, and Eloquence) is 3.72 out of a Full Score of 5.

The comparison among the 4 programs of participants in translating scientific words and phrases, as shown in Figure 1, reveals that the accuracy of students from the Chinese, Social Science, and Health Science programs was relatively similar, with an average score of approximately 3. However, their performance was below the overall average for

translation accuracy. In contrast, participants from the Science program achieved the highest accuracy, with an average score exceeding 4. Regarding grammar and eloquence, participants from the Chinese and Science programs performed above the overall average, while those in the Social Science and Health Science programs scored below it. The scientific terms that participants commonly translated correctly included speed, distance, friction, viscosity, degree of freedom, ideal gas, projectile motion, and electric current. However, many participants struggled with terms like velocity, work, acceleration, and free fall, translating them incorrectly. This suggests that while some scientific concepts are readily transferable across languages, others pose significant challenges due to linguistic nuances or the lack of direct equivalents. The challenge of translating scientific texts, particularly abstracts, from one language to another highlights the critical need for effective strategies that ensure accuracy and clarity (Hong-ping, 2020). One approach involves leveraging language resources, such as pre-compiled offline corpora of academic articles, which can significantly improve grammar and word choices in translations (Giampieri, 2020). The importance of accurate translation in scientific communication cannot be overstated, especially with the increasing globalization of research (Hong-ping, 2020). Many academic journals are predominantly published in English, creating a significant barrier for researchers whose native language is not English (Kleidermacher & Zou, 2025). Overcoming language barriers in academia is crucial for fostering a more inclusive and globally representative scientific community (Steigerwald et al., 2022). The translation of scientific works plays a pivotal role in disseminating knowledge across different cultures and linguistic backgrounds (Van Dalen, 2011). It is crucial to consider the cultural context and nuances of both the source and target languages to produce translations that are not only accurate but also culturally appropriate (Naveen & Trojovský, 2024). Moreover, involving younger individuals in translation projects can foster a stronger connection between scientists and the broader community, sparking curiosity and encouraging active participation in scientific discovery (Juarez & Kenet, 2018).

In the sentence translation task, participants were asked to translate 3 sentences. Here is an example of one such sentence.

由电子与中子、质子所组成的原子，是物质的基本单位。相对于中子和质子所组成的原子核，电子的质量显得极小。(The atom, consisting of electrons, neutrons, and protons, is the fundamental unit of matter. In comparison to the atomic nucleus, which consists of neutrons and protons, the mass of electrons is negligible.)

The scores from the evaluation of sentence translations are presented in Figure 2.

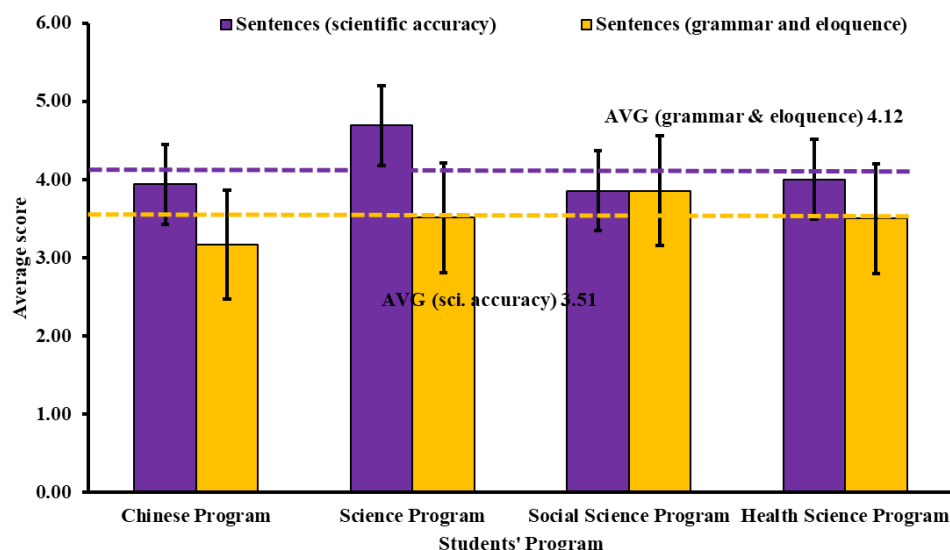


Figure 2. Average Scores From Translating Sentences of Students in the Chinese Program, Science Program, Social Science Program, and Health Science Program, in Comparison of Evaluation on Science Accuracy, Grammar, and Eloquence. All Everage (Both Science Accuracy and Grammar and Eloquence) is 3.82 out of a Full score of 5.

In Figure 2, from a scientific perspective, participants in the Science program achieved the highest translation score, approximately 4.6, placing them above the overall average. In terms of grammar and eloquence, participants from the Social Science program scored the highest, while those in the Science and Health Science programs performed at a similar level. Interestingly, participants from the Chinese program, who were expected to achieve the highest scores, did not. Insights from interviews revealed that these participants refined their translations after using the Google translation tool. However, due to their limited background in scientific terminology, their refinements often worsened the translated sentences. On the other hand, participants from the other programs relied solely on the Google translation tool for their sentence translations. Despite lacking expertise in translation, some participants were able to produce fluent and accurate translations of scientific content, benefiting from the capabilities of the translation tool (Juarez & Kenet, 2018). These findings highlight the intricate balance between leveraging machine translation tools and the necessity of domain-specific knowledge in achieving high-quality translations, especially within specialized fields like science, where precise terminology and contextual understanding are paramount. The integration of machine translation tools in academic and

research environments presents a multifaceted challenge, demanding a nuanced understanding of both the capabilities and limitations of these technologies (Kleidermacher & Zou, 2025).

The final part of the test involved translating paragraphs from a short article. An example of one such paragraph is shown below.

近年来，中国在载人航天领域取得了大量成就，让 14 亿国人感到自豪，不论是对月球，火星的探测，还是空间站的建造，以及明年将要发射的首个中国空间望远镜巡天号，都让人们感受到，中国科技实力和国家综合实力的强大，如今，又一个超级工程即将问世，中国新一代载人飞船即将重磅出世，一旦建成，建成后可搭载 7 名宇航员。(In recent years, China has attained significant milestones in manned spaceflight, instilling pride in its 1.4 billion citizens. The exploration of the Moon and Mars, the construction of space stations, and the impending launch of China's inaugural space telescope, Xuntian, next year, exemplify the formidable scientific and technological prowess, as well as the comprehensive national strength, of China. A new major project is imminent. The new generation of manned spacecraft from China is poised for launch. Upon completion, it will accommodate 7 astronauts.)

All participants completed the paragraph translation task, and their translations were evaluated. The results are presented in Figure 3.

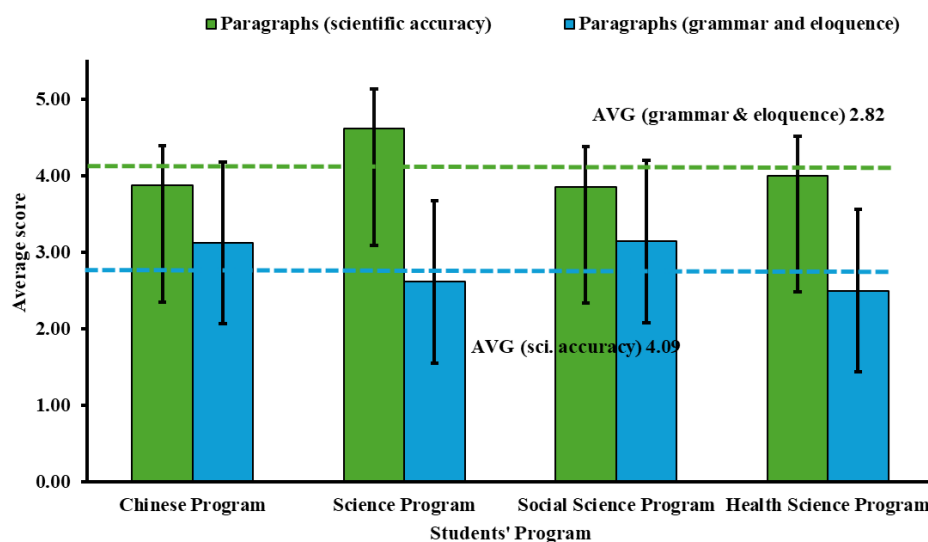


Figure 3. Average Scores From Translating Paragraphs of Students in the Chinese Program, Science Program, Social Science Program, and Health Science Program, in Comparison of Evaluation on Science Accuracy, Grammar, and Eloquence. All Everage (Both Science Accuracy, Grammar, and Eloquence) is 3.47 out of a Full Score of 5.

Similar to the translation of words, phrases, and sentences, participants from the Science program achieved the highest score in the paragraph translation task. However, their performance in grammar and eloquence was relatively lower compared to participants from the Chinese and Social Science programs. Their scores in grammar and eloquence were below the overall average, similar to those of participants in the Health Science program. In contrast, participants from the Chinese and Social Science programs scored the highest in grammar and eloquence, likely due to their greater experience with writing in their respective fields. It has been observed that evaluating the quality of translations of news articles based on isolated sentences, without considering the broader context of the entire document, can lead to skewed evaluation results (Popel et al., 2019). Furthermore, it has been recognized that collaborative strategies have improved students' translations, with the translated materials deemed "novel and appropriate" and possessing validity (Halimah, 2015).

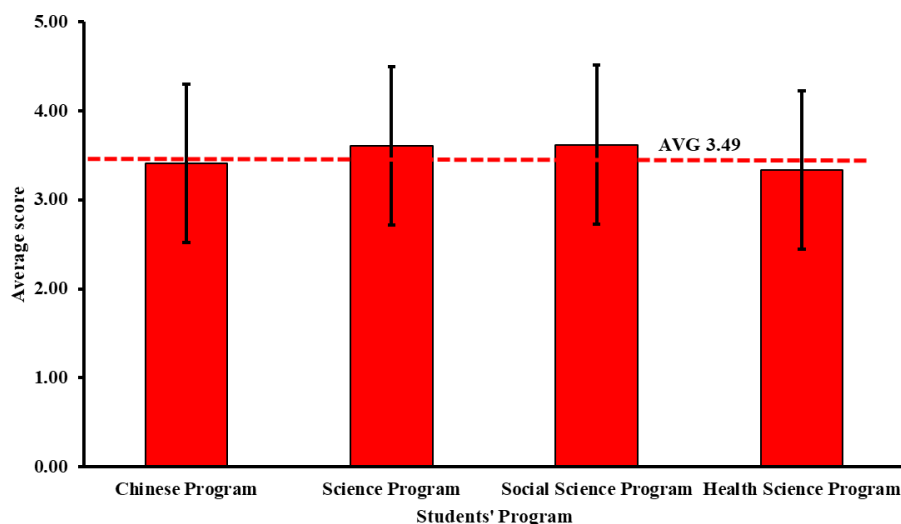


Figure 4. Overall Average Scores From Translating Paragraphs of Students in the Chinese Program, Science Program, Social Science Program, and Health Science Program, in Comparison of Evaluation on Science Accuracy, Grammar, and Eloquence. All Average (Both Science Accuracy, Grammar, and Eloquence) is 3.49 out of a Full Score of 5.

The overall scores, combining scientific accuracy, grammar, and eloquence evaluations, are presented in Figure 4, reflecting the translation abilities of participants from the four programs. The results show that participants in the Science and Social Science programs achieved scores above the average line, while participants from the Chinese and Health Science programs scored below the average. The overall score for participants in the Science program was largely driven by their scientific translation performance, whereas the Social Science program's scores were dominated by grammar and eloquence. These results highlight areas for improvement in both scientific knowledge and writing skills among participants from the Chinese language program.

Observations on Translation Errors

The evaluators identified the following causes of the mistakes made by participants as follows.

1. Lack of post-translational review.
2. Utilization of nonsensical numerical data, such as the passage's segment that conveys "让 14 亿人感到自豪--making 14 million Chinese people proud." By the majority of participants, the passage was successfully translated. Nevertheless, in the final sentence of the paragraph, "建成后可搭载 7 名宇航员" as "Upon completion, it will accommodate 7 astronauts." participants translated "The spaceship will be capable of transporting 10,000 individuals once it is completed," which is truly remarkable.
3. Inappropriate word choices that do not align with the context; failure to assess whether translated words provided by the translation tool fit the content, or not, such as the experimental test showed that some participants mistranslated the phrase "research possibilities" as "sexual research". This indicates that certain participants copied the sentence as a line rather than a sentence because Chinese "性" means "sex" and "研究" means "research". Therefore, it is advisable to use a translation tool to translate from words or sentences to preserve the original meaning rather than translating into lines.
4. Incomplete or fragmented translation of the content, such issues arise from PDF file translation via the Google translation tool, resulting in omitted numerals and leading to misinterpretations of values such as '5' as 'several years' and '1,500' as '150,000 yuan', significantly altering the intended meanings.
5. Translation inaccuracies, especially regarding numerical figures.
6. Assessment of language and scientific accuracy during the translation process.
7. Foundational translation skills at each program specialize among the programs of participants.

These identified errors shed light on the critical aspects that need improvement in the translation process. Addressing these issues is crucial for ensuring the quality and reliability of translated scientific content. Additionally, understanding the foundational translation skills required at different academic levels can inform targeted interventions and training programs aimed at enhancing translation proficiency among students. Incorporating systematic post-translation review processes and promoting a deeper understanding of the subject matter can further contribute to more accurate and comprehensive translations in scientific research contexts.

Individuals lacking a background in science may face challenges in accurately translating scientific texts, as they may not fully comprehend the technical terminology and concepts involved. This reliance on translation tools without adequate scientific knowledge can lead to errors, misinterpretations, and inconsistencies in the translated content. Moreover, our research suggests that linguistic proficiency alone may not suffice for producing accurate scientific translations. While language skills are crucial, they must be complemented by a solid understanding of scientific principles and terminology to ensure the fidelity of translations.

The experimental group specializing in science exhibited closely clustered scores in both the Language Translation and Science Translation sections. Conversely, other groups' scores were more disparate, indicating a more consistent performance level within the science cohort. Such findings suggest a potential correlation between scientific acumen and proficiency in translation tasks. Further investigation into this relationship could yield insights into the interplay between language skills and scientific comprehension, offering valuable implications for educational practices and research methodologies. It is observed that students who studied science courses in their native language demonstrated a superior grasp of scientific concepts compared to those who studied in a foreign language (Kocakulah et al., 2005). This underscores the importance of linguistic accessibility in facilitating effective science education and knowledge acquisition (Charamba, 2023; Webb, 2010).

V. CONCLUSION

The finding of this research is that students from Science and Social Science programs outperformed others in Chinese-to-Thai translation tasks. Science students excelled in scientific accuracy and terminology, while Social Science students demonstrated better fluency and structure in written translations. In contrast, students from the Chinese language program showed lower performance in translating scientific content, highlighting a lack of scientific foundation that affected their comprehension and coherence. Based on the results of this research, the suggestions for improvement are to enhance scientific translation quality. It is recommended to examine how a scientific background influences translation accuracy, especially when using tools like Google Translate. Emphasizing linguistic proficiency is crucial, as it affects clarity and fluency. Specialized training programs should be developed to teach effective use of translation tools, focusing on context and terminology. Integrating AI-powered tools, such as adaptive translation models and grammar checkers, can support accuracy and refinement. Promoting interdisciplinary education that combines science and language enhances translation competence. Evaluating current translation practices will help identify effective strategies and inform practical guidelines for improvement.

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Tertium Comparationis and Semanto-Syntactic Equivalence Across Arabic-English Languages: A Study of Qur'anic Constructions and Their Translations Through Krzeszowski's Approach

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Abstract—This Arabic-English contrastive study aims to fill the gap left by the lack of a comparison model by employing both Krzeszowski's (1990) taxonomy of equivalence and his semanto-syntactic equivalence, which are based on the hypothesis of identical deep structures or semantic inputs across the languages under scrutiny. In the present contrastive study, the deep structures of selected Arabic Qur'anic constructions and their English renderings were investigated. Specific methods were used for the examination of deep structures, such as semantically describing the origin and target constructions in terms of Fillmore's and Al-Khuli's semantic roles. Afterwards, selectional restrictions, co-occurrence restrictions, lexical items, and transformations of the texts under scrutiny were discussed. To do this, Qur'anic texts and their four renderings (i.e., 40 Qur'anic constructions and 160 translations) were selected and analyzed. As a result, the study reached certain conclusions supporting or opposing the hypotheses, objectives, and research questions. Using a quantitative (or statistical) approach, the results and conclusions of the present study found that a large number of the renderings of Qur'anic constructions into English are semanto-syntactically equivalent, whereas a low percentage are non-equivalent.

Index Terms—Arabic-English deep structures, equivalence across Arabic-English languages, Krzeszowski's methodology, semanto-syntactic equivalence, Fillmore's and Al-Khuli's semantic roles

I. INTRODUCTION

The concepts of *tertium comparationis* and equivalence are central to contrastive linguistics but have received little attention in Arabic-English studies, particularly in the context of Qur'anic data. *Tertium comparationis* (TC) refers to the common ground required for comparison, while, according to Chesterman (1998), equivalence is closely tied to this notion. Krzeszowski (1990) focuses on these concepts in his model of semanto-syntactic equivalence, which examines similarities at the level of deep structure rather than at the surface.

This study applies Krzeszowski's approach to Arabic-English contrastive analysis, focusing on Qur'anic constructions and their translations. It addresses key questions concerning the applicability of *tertium comparationis*, the adaptation of Krzeszowski's methodology, the degree of cross-linguistic preservation of deep structures and semantic roles (e.g., Fillmore's framework), and how the word and sentence ranks (Constraints C1 and C2) of the examined data aid in the assignment of semanto-syntactic equivalency. The main objectives of the current study are (1) to adapt and apply Krzeszowski's model to Arabic-English comparison; (2) to examine Qur'anic deep structures and their translations for equivalence; (3) to analyze data in terms of semantic roles, restrictions, and transformations; (4) to test constructions at word and sentence ranks (C1 & C2); and (5) to present equivalence versus non-equivalence through tables and percentages.

A. Research Questions

The present study tries to answer the following research questions:

1. How can the concepts of *tertium comparationis*, semanto-syntactic equivalence, and deep structures be referred to in English and Arabic traditions?
2. How can Krzeszowski's (1990) methodology be adapted for Arabic-English contrastive analysis?
3. How can the deep structures and semantic representations of Qur'anic constructions be identical and (semanto-syntactically) equivalent with those of their renderings into English?
4. How can the deep structures (semantic inputs) of the selected data across the Arabic-English languages be

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- represented semantically?
5. How can testing the word and sentence ranks (Constraints 'C1' & 'C2' in Krzeszowski's words) of the data under scrutiny help appoint semanto-syntactic equivalence?
 6. What is the percentage of (semanto-syntactic) equivalence or non-equivalence among the analyzed constructions of the Qur'anic texts and their English translations?

B. Research Hypothesis

Consequently, the present study hypothesizes that:

1. The notions of *Tertium comparationis*, (semanto-syntactic) equivalence, and deep structures can be found in Arabic and English traditions.
2. Krzeszowski's (1990) methodology can be adapted for English-Arabic contrastive studies.
3. Most deep structures of Qur'anic constructions and their English renderings are identical and semanto-syntactically equivalent.
4. Fillmore's and Al-Khuli's semantic roles, selection (al) and co-occurrence restrictions, lexical items, and transformations are parameters for representing the deep structures of the selected data.
5. The constructions of the two languages share similarities at the word and sentence levels, indicating no violation of the two constraints Krzeszowski imposed on semanto-syntactic equivalence.
6. As a quantitative approach, the percentage of semanto-syntactic equivalence (among the deep structures of the selected constructions under scrutiny) is high.

II. LITERATURE REVIEW

Developed from 1971 to 1990, Krzeszowski's concept of semanto-syntactic equivalence is rooted in the hypothesis that equivalent constructions share identical deep structures, even when their surface structures differ (Krzeszowski, 1971, 1990). As influenced by generative grammar (i.e., Lakoff's more abstract notion of deep structure), Krzeszowski redefined it as "input" or "semantic structure" to avoid confusion with Chomsky's standard model (Bouton, 1976; Krzeszowski, 1990). Moreover, his theory draws on Catford's (1965) notion of textual equivalence and emphasizes that comparison across languages requires equivalent constructions as data (Bouton, 1976).

Developing deep structure theories has led to a universal or standard deep structure across languages (Chomsky, 1957; Fillmore, 1968; Jacobs, 1969; Di Pietro, 1971). Hence, Krzeszowski (1990) incorporates selectional restrictions, co-occurrence constraints, and semantic roles to test equivalence, asserting that semantic interpretation is grounded in deep structure. He combines equivalence (meaning-based) with formal correspondence (form-based) and stresses the role of bilingual intuition in identifying equivalents.

However, Fillmore's case grammar and Krzeszowski's predicate calculus provide the semantic foundation for contrastive studies, serving as *tertium comparationis* (McCawley, 1968; as cited in Krzeszowski, 1990). To ensure rigor, Krzeszowski has proposed two constraints (C1 and C2) that exclude conflicting lexical features and require the closest possible correspondence in translation. These principles support his claim that semanto-syntactic equivalence can be systematically applied to cross-linguistic comparison (Krzeszowski, 1981, 1990).

Drawing on Lakoff (1968), Krzeszowski (1990) argues that deep structures must be more abstract than surface structures, since absent categories (e.g., subject, verb, or object) in surface forms must be represented at the deep level. Dissatisfied with the Standard Theory, he adopts Lakoff's model, which incorporates semantics into deep structure and highlights its generative role (Krzeszowski, 1990). According to Lakoff (1968), deep structures define basic grammatical relations, generalize selectional and co-occurrence restrictions, assign lexical items to categories, and provide input for transformational rules.

This framework underlies Krzeszowski's hypothesis that equivalent sentences across languages share identical deep structures (Lakoff, 1968). Furthermore, selectional restrictions are defined by Finch (2000) as "semantic restrictions on the co-occurrence of linguistic items" (p. 177) and co-occurrence as defined by Trask (1993) is a general term that denotes a specification over the occurrence in the syntactic structure of two elements regarding their presence or absence or their forms that play a central role: verbs and nouns require compatible subjects, objects, or modifiers (e.g., *eat* [+ animate subject + edible object]). Violations of these constraints, such as "The stone eats a banana" or "You deceived my watermelon," produce semantic anomalies (Lakoff, 1968). Scholars such as Finch (2000), Trask (1993, 2007), Cruse (2006), and Murphy and Koskela (2010) confirm that selectional restrictions govern semantic well-formedness, distinguishing them from grammatical constraints. Thus, selectional restrictions and co-occurrence are key tools for investigating deep structure equivalence across languages, making them essential in Krzeszowski's model of semanto-syntactic equivalence. Furthermore, the analysis of any text may face many problems, as summarized by Szwedek (1984) as (1) the problem of equivalence and semantic representation and (2) comparison of certain surface phenomena.

In this regard, Szwedek (1984) argues that semantic representation should consist of semantic categories and relations, with semantic features both grammaticalized within a language and embedded in lexical meanings. If two languages grammaticalize a feature to a similar extent, structural equivalence can be established between them regardless of surface similarity, and this view is close to Krzeszowski's approach. However, Szwedek (1984) notes that

difficulties arise when semantic categories converge in surface structures or when a constituent performs multiple functions, making clear separation and description problematic. Additionally, Szwedek (1984) describes the structures in their simple forms as follows:

1. Grammatical Structure: subject, verb, object
2. Semantic Structure: agent, action, and goal
3. Thematic Structure: topic and content

Firbas (1974; as cited in Szwedek, 1984) orders the following structures: the action is initiated by the actor (agent), who necessarily exists before it, and the goal or object follows it. Furthermore, Chesterman (1998) adapts Mustajoki's model of semantic structure, illustrated in examples such as "Fred swept the floor" [Ac; S, O] and "Sue sold her car to Fiona" [Ac; S, R, O]. McCawley (1968), however, argues that semantic and syntactic representations share the exact formal nature. Similarly, Krzeszowski (1990) refers to Polanski's (1966) comparison of Chomsky's English phrase structure rules with those proposed for Polish to highlight parallels in syntactic representation.

Additionally, Fillmore's (1966) model of base rules, initially designed for English, was later adapted by scholars such as Di Pietro (1971) for contrastive studies. Based on the hypothesis that all languages share the same deep structure or at least the same core elements of sentence, modality, and proposition as cited by Krzeszowski (1990), Fillmore's rules appear more universal and simpler than Chomsky's (Al-Khuli, 2000).

These rules are as follows:

1. PS1: $S \rightarrow (\text{Mod}) \text{Aux. Prop.}$
Where S = sentence
Mod. = modality
Aux. = auxiliary
Prop. = proposition
The arrow $\rightarrow$ = is rewritten
The parentheses () = optionally included.
2. PS2: $\text{Mod.} \rightarrow \left(\begin{array}{c} \text{Sentence Adverbials} \\ \text{Time Adverbials} \\ \text{Interrogatives} \\ \text{Negative Elements} \end{array} \right)$
3. PS3: $\text{Prop} \rightarrow V (\text{Erg.}) (\text{Dat.}) (\text{Loc.}) (\text{Inst.}) (\text{Ag.})$

The brackets indicate free choice. Sentence adverbials, such as "therefore," modify all sentences rather than a particular word.

Where V. = verb

Erg. = ergative (i.e., the subject of an intransitive verb and the object of a transitive verb; it is an NP that is most attached to V, and what Fillmore symbolized later on as Obj.)

Dat. = dative; the indirect object

Loc. = locative; the place referent

Inst. = the instrument of the action

Ag. = the actual doer of the action

1. PS4: $\left(\begin{array}{c} \text{Erg.} \\ \text{Dat.} \\ \text{Loc.} \\ \text{Inst.} \\ \text{Ag.} \end{array} \right)$
2. PS5: Where NP = nominal phrase
 $\text{NP} \rightarrow \text{P} (\text{Det.}) (\text{S}) \text{N.}$
Where P = preposition
Det. = determiner
S = sentence
N = noun

In his *Contrastive Generative Grammar*, Krzeszowski (1990) introduces the concept of the "Original Configuration," built on Fillmore's semantic roles: Agent (A) at the top, followed by Patient (P), Resident (R), and three locus-related roles: form locus (fL), at locus (atL), and goal. These serve as universal semantic categorial rules. Central to his framework are reference and co-reference, whereby configurations may act as referents within others. He further notes that roles without referential indices are erased, while coreferential roles within the same subconfiguration are merged, and that subconfigurations receive both referential indices and role labels (Krzeszowski, 1990).

Developed by Krzeszowski (1971, 1990), semanto-syntactic equivalence requires examination within European traditions to identify parallels or lack thereof in Arabic studies. Thus, Krzeszowski's primary concern beyond this theory is to prove the validity of a hypothesis that "equivalent constructions have identical deep structures even if on the surface they are markedly different" (Krzeszowski, 1990, p. 148). Strongly influenced by Chomsky's generative grammar, Krzeszowski adopts Lakoff's (1968) version of deep structure, which he considers more abstract and thus

more suitable for contrastive analysis.

In addition, Krzeszowski's theory builds on Fillmore's semantic roles within his "original configuration" and replaces Chomsky's notion of deep structure with "input" or "semantic structure" to avoid confusion with the Standard Theory (Krzeszowski, 1990). His framework also draws on Lakoff's (1968) deep structure and Catford's (1965) equivalence. Bouton (1976) clarifies that for Krzeszowski, equivalence means (1) constructions are mutually translatable, and (2) cross-linguistic comparison requires such equivalent constructions as data. Building on this theoretical foundation, the present study turns to Arabic scholarship, where the concepts of equivalence and deep structure have been addressed in various ways. In particular, the focus is on how Arab scholars approach the hypothesis of identical deep structures across languages, a notion central to semanto-syntactic equivalence. For instance, Bakir (1990) and others have examined parallels between Arabic deep structures and Chomskyan models. One of the earliest contributors is Al-Wa'er, whose works include *Toward a Modern and Realistic Sentential Theory of Basic Structures in Standard Arabic* (1983, 1987), a study that examines the fundamental rules of Arabic sentence structures, illustrated through examples such as interrogative constructions.

Several Arab scholars have addressed issues close to Krzeszowski's (1990) semanto-syntactic equivalence. Al-Wa'er (1983, 1987) distinguishes between yes/no and wh-questions in Arabic, arguing that while they undergo different syntactic transformations, they share semantic aspects under structural constraints—a view reminiscent of the common underlying structures in Krzeszowski's hypothesis. Similarly, Hassaan (1985) developed the idea of a single deep structure and multiple systems, proposing NP–VP configurations as the universal base of Arabic, where variation across languages is stylistic rather than grammatical.

Moreover, Zakaria (1986) also affirms that deep structure reflects universal meaning, while surface rules differ across languages. Bakir (1990) compares Chomsky's and al-Jurjānī's notions of deep structure, cautioning that identical structures do not always imply identical meanings. In addition, Al-Khuli (1999) provides a significant contribution with *Transformational Rules for the Arabic Language*, highlighting the difficulty of distinguishing deep and surface structures. He justifies using transformational rules on the grounds of their explanatory power, showing how different surface forms can share a single underlying structure. He also adapts Fillmore's base rules to Arabic because they are more universal and efficient than Chomsky's model.

Later, Hamaasa (2000) integrates syntax and semantics under the label "syntactic-semantic meaning," reminding the reader of the four points of Lakoff's (1968) deep structure and drawing on classical Arabic thought, such as that of al-Jurjani, Sibawayh, and Ibn Jinni. He emphasizes the universality of abstract grammatical relations and lexical selection rules, linking them to Chomskyan selectional restrictions. Likewise, Ukasha (2014) compares Fillmore's case grammar with Arabic, noting both overlap and variation in semantic roles such as Agent, Experiencer, Benefactive, Object, and Locative, as well as Fillmore's later refinements.

These studies show that Arab linguists have engaged deeply with the concepts of deep structure, universal grammar, and equivalence. Their works often converge with Krzeszowski's assumption of common semantic structures across languages, while also adapting Fillmore's or Chomsky's models to account for the specificities of Arabic sentence types.

III. METHODOLOGY

A. Research Design and Instruments

The current study adopts both qualitative and quantitative methods. In the qualitative method, the researcher will provide in-depth explanations and descriptions of the purposively selected original constructions from the Arabic Qur'an and their renderings into English from four well-known translators, Pickthall (1997), Ali (2001), Shakir (1999), and Abdel Haleem (2005), to answer the research questions and fulfill the study's objectives. A table showing the percentage of semanto-syntactic equivalence between Qur'anic constructions and their four chosen English renderings, in terms of identical deep structures (equivalence) or non-equivalence, was sufficient for this study's quantitative research method.

To investigate *tertium comparationis*, semanto-syntactic equivalence, and the identical deep structures across Arabic and English, data collection involved juxtaposing original constructions with target translations and comparing their deep structures. Thus, original constructions were purposively selected, and the researcher deliberately selected the extracts based on specific characteristics or qualities relevant to the study's aims. Hence, the original constructions were selected from the Arabic Qur'an, and their renderings were translated into English by four famous translators (Pickthall, 1997; Ali, 2001; Shakir, 1999; Abdel Haleem, 2005). Moreover, the justification for selecting Qur'anic expressions in Arabic was because (1). The high standards of language of Quranic Arabic, (2). An uneasy comprehension of Qur'anic constructions for non-Arab learners, a discrepancy in the English translations of the Qur'an, and (3) A translation of Qur'anic texts into English, in addition to legal and literary types, is problematic, as Krzeszowski (2016) states.

In addition, the procedures that were followed for the study included:

1. The description of linguistic phenomena (contrastive linguistics, *tertium comparationis*, equivalence, deep structure, syntactic and semantic representations, lexical restrictions and co-occurrence, and transformations) in the English and Arabic traditions.
2. A description of Krzeszowski's (1990) model of analysis, which can be adapted for an Arabic-to-English contrastive study, was also carried out.

3. The data for analysis (i.e., Qur'anic constructions and four famous English translations) were then selected.
4. The source and target texts or constructions were juxtaposed for scrutiny to identify similarities and differences, which are the cornerstone of any contrastive study, as the aforementioned linguistic phenomena of the two languages are examined.
5. The semantic roles, selectional restrictions, co-occurrence, and transformations of the Qur'anic texts and their selected translations were investigated.
6. The deep structures of the data were compared under scrutiny to find similarities and differences in terms of identical deep structures and equivalence.
7. Similarities between the deep structures of the source and target constructions were noted and led to identical deep structures and semanto-syntactic equivalence; in contrast, dissimilarity led to non-equivalence.
8. Krzeszowski's two constraints of word rank (C1) and sentence rank (C2) were assessed, and violations of these two constraints yielded non-equivalence, lexical gaps, or semanto-syntactic gaps.
9. Tables were created to ensure availability and present the percentages of equivalents and non-equivalents among Qur'anic constructions and their English translations.

B. Model of Analysis

The present study was subjected to Krzeszowski's (1990) model of comparison, on the one hand, or an eclectic model, on the other hand, if one combines Fillmore's model of semantic representation with Al-Khuli's adaptation for representing Arabic sentences semantically. That was justified by following a similar type or model of representation for the two languages under scrutiny. Otherwise, a contrastive study would have been impossible if the comparison or semantic representation models for one language differed from those for another. In the end, the present study intended to investigate semanto-syntactic equivalence between the selected Qur'anic constructions with four of their renderings into English, with the belief that it is not a total equivalence.

IV. RESULTS AND DISCUSSION

The analyses and comparisons of Qur'anic constructions and their English translations included active, simple, compound, and complex sentences, numbered 1-40. This data was followed by analyzing the components of the construction and highlighting the semantic roles of its categories, as per Fillmore's and Al-Khuli's base rules. Furthermore, only three Qur'anic constructions are offered as analysis samples, whereas others are presented in the quantitative results and discussions. After that, the base structure and the semantic roles of this Qur'anic construction are revealed in a linear pattern. Moreover, selectional and co-occurrence restrictions, as well as the process of transformation from which this structure is derived, are highlighted in addition to covering the construction concerning word and sentence ranks.

Similarly, the four English renderings of this construction, labelled a through d, will be analyzed in parallel with the Qur'anic construction, in terms of their semantic representations based on Fillmore's and Al-Khuli's semantic roles, and arranged in linear patterns. The analysis will also address selectional and co-occurrence restrictions, transformational processes, and the ranks of words and sentences. After each Qur'anic construction and its four corresponding renderings are analyzed, a comparative evaluation will be conducted between the source and target constructions. This comparison focuses on semantic representations: base rules or semantic roles, selectional and co-occurrence restrictions, and word and sentence ranks to identify similarities and differences. The results will be summarized in a table for each Arabic construction, with its four English renderings by Pickthall (1997), Ali (2001), Shakir (1999), and Abdel Haleem (2005). The table will align the semantic roles of the source construction with those of its renderings, marking identical representations with a check mark (✓) and non-identical ones with an X, thereby indicating semanto-syntactic equivalence or non-equivalence.

1. Qur'an 1:5

Arabic: إِيَّاكَ نَعْبُدُ وَإِيَّاكَ نَسْتَعِينُ

Transliteration: *iiyaka na'budu wa iiyaka nasta'iiin*

English: "You alone we worship, and You alone we ask for help."

This *ayaa* ("verse") of the glorious Qur'an is made of two proportions or clauses, specifically *إِيَّاكَ نَعْبُدُ* / *ayaaka na'budu* ("You we worship") and *إِيَّاكَ نَسْتَعِينُ* / *ayaaka nasta'iiin* ("You alone we ask for help"). As an abstract deep structure, the first proportion is that *إِيَّاكَ* / *ayaaka* ("you") is a fronted object with an ergative semantic role (Erg.). The agentive subject (Ag.) is *نَحْنُ* / *nahnu* ("we"), which is implied in the attached *ن* / *nun* (the letter "n") as *نَحْنُ* / *nahnu* ("we"). Consequently, the selectional restrictions and co-occurrence of the verb *نَعْبُدُ* / *na'bud* ("worship") is "the imperfect, transitive verb" in that construction, which requires a factual subject as the pronoun *نَحْنُ* / *nahnu* ("we") with the features (+ animate + human + concrete + pronoun + plural + worshipper) and the direct object *إِيَّاكَ* / *ayaak* ("you") with the features (+ power + superior + abstract + pronoun + singular). Furthermore, the verb *نَعْبُدُ* / *na'bud* ("worship") can be classified within the word "worship" (religious actions) as far as the semantic field is concerned. Even more, the fronting object transforms this *ayaa* ("verse") into a surface structure. In addition, the second part of the construction *إِيَّاكَ نَسْتَعِينُ* / *iiyaka nasta'iiin* ("You alone we ask for help") is analyzed as a sentence (S) as far as Fillmore's base rules are concerned. However, the semantic roles of the Qur'anic constructions are:

إياك + (نحن) + نعبد + و إياك نستعين
 iyyak + (nahnu) + na'bud + wa iyyak nasta'iin
 Erg. + (Ag.) + Aux. VI + S.

Since Krzeszowski suggests that two texts be available for comparison, the two texts in this study are Qur'anic constructions (Text 1) and their English translations (Text 2). The selected translations of the above Qur'anic construction are:

- Pickthall: "Thee (alone) we worship; Thee (alone) we ask for help."
- Ali: "Thee do we worship, and Thine aid we seek."
- Shakir: "Thee do we serve, and Thee do we beseech for help."
- Abdel Haleem: "It is You we worship; it is You we ask for help."

All translations of the two Qur'anic *ayaa* begin with the ergative role of the fronted object ("thee" or "you"), followed by the agentive subject ("we"), and end with the verbs "worship" or "serve" as equivalents of the Arabic verb *نعبد/na'bud*. Regarding selectional and co-occurrence restrictions, "thee" and "you" carry the features (+ power + deity + superior + abstract + pronoun + singular), while "we" possesses the features (+ animate + human + concrete + pronoun + plural + helpless). However, the abstract components of Qur'anic constructions must be reflected in their translations; otherwise, equivalence conditions are violated. At the word and sentence levels, the subject "we" corresponds to the implied Arabic *نحن/nahnu* (human worshippers), and the object "You" refers to *إياك/iyyak* (God). Lexically, the verbs "worship," "serve," and *نعبد/na'bud* share the same reference and belong to the same semantic field as "worship".

The semantic input, or deep structures, of translations are as follows:

- Pickthall: Thee + we + worship; Thee + we + ask for help.
Erg. + Ag. + Aux. V + S
- Yusuf Ali: Thee + we + do worship, Thine aid + we + seek.
Erg. + Ag. + Aux. V + S
- Shakir: Thee + we + do serve; Thee + we + do beseech for help.
Erg. + Ag. + Aux. V + S
- Abdel Haleem: You + we + worship; You + we + ask for help.
Erg. + Ag. + Aux. V + S

The deep structures, or semantic inputs, of the original and target sentences share identical base rules and semantic roles (e.g., Erg., Ag., VI.), despite differences in word order. Since the Arabic and English constructions exhibit the same number and types of semantic roles, they display identical semantic representations and semanto-syntactic equivalence. This equivalence is further supported by their matching selectional restrictions and co-occurrence patterns. The variation in grammatical order is stylistic rather than structural, as Hassaan (1985) explains regarding Arabic surface and deep structures; for example, *قام زيد قام/qaama zayd* ("Zayd rose") and *قام زيد/qaama zayd* ("rose Zayd") differ only stylistically. Thus, beginning a sentence with a subject or verb in Arabic or English reflects stylistic variation, not grammatical difference. Consequently, the underlying meaning of both constructions remains equivalent, as in *نحن نعبد إياك/nyaaak nahnu na'bud* ("We worship You").

TABLE 1
SEMANTIC ROLES (SRs) AND EQUIVALENCE OF QUR'ANIC CONSTRUCTION 1 AND ENGLISH EQUIVALENTS

	Origin	Pickthall	Yusuf Ali	Shakir	Abdel Haleem
Semantic Roles	Erg.	Erg.	Erg.	Erg.	Erg.
	Ag. Implied	Ag. Implied	Ag. Implied	Ag. Implied	Ag. Implied
	Aux. VI	Aux. VI	Aux. VI	Aux. VI	Aux. VI
	S	S	S	S	S
Semanto-Syntactic Equivalence		✓	✓	✓	✓

2. Qur'an 14:12

Arabic: *وَعَلَى اللَّهِ فَلْيَتَوَكَّلِ الْمُتَوَكِّلُونَ*

Transliteration: *wa' laa Allah fal yatawakkal al mutawakkilun*

English: "And upon God let those who would rely, rely."

This *ayaa* ("verse") of the glorious Qur'an is made of a straightforward clause. As an abstract deep structure, *على الله/laa Allah* ("on Allah" or "in Allah") in Qur'anic construction has a locative semantic role that involves the direction or the goal to which believers resort. The verb phrase, or what Fillmore calls verbal (VI), is made of the letter *ل* ("L"), which involves the directive meaning as part of the modality attached to the main verb *يتوكل/yatawakkal*, which is an intransitive verb meaning "to put one's absolute trust (in God)" (Badawi & Abdel Haleem, 2008, p. 1044). In addition, the noun phrase *المتوكلون/almutawakkilun* ("one who relies on God") is an agentive subject. The prepositional phrase, which is the goal of the sentence, is fronted.

Consequently, the selectional restrictions and co-occurrence of the verb *يتوكل/yatawakkal* ("to put one's trust in God") in this construction indicate that it requires a subject with the semantic features (+ animate + human + concrete + noun + plural + believer + God reliant). Another noun is "Allah," or "God," which offers the features (+ power + superior + abstract + trusted + deity + noun + singular). Moreover, the verb can be classified within the semantic field of trust in

God and dependence (Omar, 2002). Moreover, this *ayaa* is transformed into a surface structure by the fronting of the *الله على/laa Allah* (“on Allah” or “in Allah”) before the verb of the sentence and its subject. Likewise, the base rules or semantic roles of this Qur’anic construction are as follows:

على الله + ل + يتوكل + المتوكلون

Ala Allah + li + yatawakal + al-mutawakilun

Loc./tL/Goal + Mod. + Aux. VI + Ag.

For comparison, the translations of this Arabic construction into English are presented below:

- (a). Pickthall: “In Allah let believers put their trust!”
- (b). Ali: “And on Allah let all men of faith put their trust.”
- (c). Shakir: “And on Allah should the believers rely.”
- (d). Abdel Haleem: “Let anyone who trusts, trust in God.”

All translations of the *ayaa* start with the locative or goal role expressed by the prepositional phrase (“in/on Allah”), which is fronted for emphasis, except in the last translation, which begins with “Let.” The subsequent nouns (“believers,” “men of faith,” and “anyone who trusts”) function as agents sharing identical semantic features. The verbs “let put,” “should rely on,” and “let trust” correspond to the Arabic verb ليتوكل *lituki* (“to rely”), where the particle *li* (“to”) conveys a directive sense similar to “let,” while “should,” in one translation, expresses modality or command. Despite minor lexical variations, all verbs belong to the same semantic field of trust and divine reliance. Regarding selectional and co-occurrence restrictions, the subjects (“believers,” “men of faith,” and “anyone who trusts”) exhibit the features (+ animate + human + concrete + believer + plural + God-reliant). At the same time, the object nouns “Allah” and “God” possess the features (+ power + superior + deity + abstract + singular + trusted). As far as the testing of the two constraints C1 and C2 is concerned (i.e., word and sentence ranks), the word constructions “believers,” “men of faith,” and “anyone who trusts” are synonymous, and they have a reference to المتوكلون *almutawakkilun* (“one who relies on God”), and “Allah” and “God” are synonymous and have a reference to الله *Allah* (“God”) in Arabic. As far as the lexical item of the verb phrase is concerned, internally and externally, the verbs “let put,” “should rely on,” and “let trust” are synonymous and have a reference to the Arabic verb ليتوكل *liyatawakal* (“to rely”), which falls into the same semantic field of “trust and God reliance.”

The following are the semantic inputs, or deep structures, of translations:

- (a). Pickthall: In Allah + (‘you’ implied) + let + believers + put their trust!
Loc./Goal + (Ag.) + VI + Erg. + S
- (b). Yusuf Ali: on Allah + (‘you’ implied) + let + all men of faith + put their trust.
Goal + (Ag.) + VI + Erg. + S
- (c). Shakir: on Allah + should + the believers + rely.
Goal + Aux. + Ag. + VI
- (d). Abdel Haleem: ‘You’ implied + let + anyone who trusts + trust in God.
(Ag.) + VI + Erg. + S

Compared to the original Arabic construction, variations appear in the number and assignment of semantic roles. The first three translations include “in/on Allah” as a goal, an implied agentive subject (Ag.) in (a, b, d), followed by the verbal element “let” as a directive, and the phrases “put their trust” and “trust in God,” which function idiomatically. Shakir’s translation (Goal + Aux. + Ag. + VI) aligns more closely with the original structure, supporting semanto-syntactic equivalence. Still, sentence rank analysis indicates that translations (a, b, d) are acceptable but do not achieve full semanto-syntactic equivalence.

TABLE 2
SEMANTIC ROLES (SRs) AND EQUIVALENCE OF QUR’ANIC CONSTRUCTION 2 AND ENGLISH EQUIVALENTS

	Origin	Pickthall	Ali	Shakir	Abdel Haleem
Semantic Roles	Goal	Goal	Goal	Goal	(Ag.)
	Mod.	(Ag.)	(Ag.)	Aux.	VI
	Aux. VI	VI	VI	Ag.	Erg.
	Ag.	Erg.	Erg.	VI	S
		S	S		
Semanto-Syntactic Equivalence		X	X	✓	X

3. Qur’an 42:53

Arabic: أَلَا إِلَى اللَّهِ تَصِيرُ الْأُمُورُ

Transliteration: *‘ala ‘ila Allah tasiir al’umur*

English: Indeed, to Allah do all matters return.

This *ayaa* (“verse”) of the glorious Qur’an contains one proposition. As an abstract deep structure, it starts with an *ألا/‘ala*, which has no function as far as parsing in Arabic is concerned (Al-Kurbasi, 2010), which may have the function of paying the listener’s attention to be suitable as a modality according to Fillmore’s model. Additionally, *إلى الله/‘ila Allah* (“to Allah”) in Qur’anic construction has a locative semantic role that involves the direction or the goal to which all things return. The verb phrase, or what Al-Khuli calls verbal (VI), contains the main verb *تصير*, transliterated as *tasiir*,

which is an imperfect verb (intransitive) denoting the meanings “to go to” or “to return to” (Badawi & Abdel Haleem, 2008, p. 543). Moreover, the noun *الأُمُور*/*al'umur* (“affairs”) is an agentive subject.

Consequently, the selectional restrictions and co-occurrence of the verb *تَصِير*/*tasiir* (“return”) in this construction indicate that it requires a subject with the semantic features (+ animate, + human, + concrete, + noun, + plural). Another noun is *الله*/*Allah*, which has the features (+ power, + superior, + deity, + abstract, + noun, + singular) attached to the preposition “to,” denoting the goal semantic role to which all things return. Moreover, the verb can be classified within the semantic field of destination or end (Omar, 2002). Likewise, this *ayaa* (“verse”) has no transformation except the fronting of *إلى الله*/*ila Allah* (“to Allah”) before the verb and the subject of the sentence. Likewise, the base rules or semantic roles of this Qur’anic construction are as follows:

ألا + إلى + الله + تصير + الأمور
Ala + 'ila Allah + tasiir + al'umur
 Mod. + Loc./Goal + Aux. VI + Ag.

For the sake of comparison, the four selected translations of this Arabic Qur’anic construction into English are:

- Pickthall: “Do not all things reach Allah at last?”
- Ali: “Behold (how) all affairs tend towards Allah!”
- Shakir: “Now surely to Allah do all affairs eventually come.”
- Abdel Haleem: “Truly everything will return to God.”

The translations of this *ayaa* (“verse”) exhibit variations in modalities and semantic roles according to Fillmore’s base rules. Modalities, expressed through adverbs of time, interrogatives, and negatives, appear in the translations but are absent in the original. Regarding propositions, translations (a, b, d) differ in the number of semantic roles, while translation (c) aligns with the original. The verb *تَصِير*/*tasiir* is rendered as “reach,” “tend,” “come,” and “return,” indicating lexical divergence. Selectional restrictions and co-occurrence analysis indicate that the verbs require subjects with features (+ animate, + human, + concrete, + noun, + plural) and a noun (“Allah” or “God”) with features (+ power, + superior, + deity, + abstract, + noun, + singular, + trusted).

Concerning the two constraints C1 and C2, or the word and sentence ranks, the word constructions “all things,” “all affairs,” “all things,” and “everything” are synonymous, and they have a reference to *الأُمُور*/*al'umur* (“matters”), and Allah and God are synonymous and have a reference to *الله* (*Allah*) in Arabic. As far as the lexical item of the verb phrase is concerned, the verbs “reach,” “tend,” “come,” and “return” are not absolute synonyms, but they have a reference to the Arabic verb *تَصِير*/*tasiir*, which falls into the same semantic field of “trust in God” and “returning.”

The following are the semantic inputs, or deep structures, of translations:

- Pickthall: Do + not + all things + reach + Allah + at last?
 Mod.1 Inter. + Mod.2 Neg. + Ag. + Aux. VI + Loc./Goal + Mod.3 (Adv. of time)
- Ali: Behold + (you) + (how) + all affairs + tend + towards Allah!
 VI ‘imperative’ + (Ag. Implied) + S [(Mod. Inter.) + Ag. + Aux. VI + Loc./Goal.]
- Shakir: now + surely + to Allah + do + all affairs + eventually + come.
 Mod.1 Adv. of time + Mod.2 Adv. + Loc./Goal + Aux. + Ag. + Mod.3 Adv. + VI
- Abdel Haleem: truly + everything + will return + to God.
 Mod. + Ag. + Aux. VI + Loc./Goal.

Accordingly, since the deep structures or the semantic inputs of the original sentence are not identical to the ones in the translations above, the fourth one seems identical to the original one regarding the number of semantic roles. In contrast, the abovementioned translations are not semanto-syntactic equivalent to the original deep structure. Regardless of its order, the fourth translation is similar to the original construction, containing Goal, Ag., Aux. V and Mod. However, the sentence rank indicates that translation (d) is an acceptable word-for-word translation and a synonymous paraphrase that may be understood or rearranged as “تَصِيرُ الْأُمُورُ إِلَى اللَّهِ”/*tasiir al'umur ila Allah* and “Everything will return to Allah”.

TABLE 3
 SEMANTIC ROLES (SRS) AND EQUIVALENCE OF QUR’ANIC CONSTRUCTION 3 AND ENGLISH EQUIVALENTS

	Origin	Pickthall	Ali	Shakir	Abdel Haleem
Semantic Roles	Mod.	Mod. 1	VI	Mod. 1	Mod.
	Goal	Mod. 2	(Ag.)	Mod. 2	Ag.
	Aux. VI	Ag.	S	Goal	Aux. VI
	Ag.	Aux. VI	Mod.	Aux.	Goal
		Goal	Ag.	Ag.	
		Mod. 3	Aux. VI	Mod. 3	
Semanto-Syntactic Equivalence		X	X	X	✓

Findings

After comparing the deep structures of the original Qur'anic texts and their selected English renderings, the table shows the percentages of semanto-syntactic equivalence, ranked from highest to lowest: Shakir (65.85%), Pickthall (60.97%), Ali (55.09%), and Abdel Haleem (53.65%). Conversely, the non-equivalence percentages are Abdel Haleem (46.34%), Ali (43.90%), Pickthall (39.02%), and Shakir (34.14%). These results indicate that Shakir's translation exhibits the highest semanto-syntactic equivalence and the lowest non-equivalence among the four translations. The total number of texts analyzed is 40, with text 10 divided into A and B, giving a total of 41 for calculation purposes.

This study demonstrates that Krzeszowski's (1990) methodology, originally applied to English–Polish contrastive studies, can be effectively adapted to English–Arabic contrastive studies. The study applies his procedures for identifying semanto-syntactic equivalence by representing the semantic roles of source and target constructions, examining selectional restrictions and co-occurrence, consulting lexical references, and highlighting relevant transformational processes. Ultimately, the analysis compares the deep structures of the original and target constructions to determine whether their semantic representations are identical or non-identical.

Hence, the present study identifies semanto-syntactic equivalence as a key *tertium comparationis* within Krzeszowski's model by analyzing the deep structures of Qur'anic constructions and their four English renderings (Pickthall, 1997; Ali, 2001; Shakir, 1999; Abdel Haleem, 2005). Comparisons of the original texts with their translations in Table 4 show the highest semanto-syntactic equivalence in Shakir (65.85%), followed by Pickthall (60.97%), Ali (55.09%), and Abdel Haleem (53.65%). Conversely, non-equivalence is highest in Abdel Haleem (46.34%) and lowest in Shakir (34.14%). These results indicate that Shakir's translation most closely preserves the identical deep structures of the Qur'anic constructions. Furthermore, either Krzeszowski's Original Configuration or Fillmore's Semantic Roles were applied to analyze the deep structures of the 40 selected Qur'anic texts and their English renderings, using roles such as V, Erg, Dat, Loc, Inst, and Ag. The analysis demonstrates that Fillmore's original semantic roles and Al-Khuli's modified version apply to the underlying structures of Qur'anic constructions and their English translations, as summarized in Table 4.

TABLE 4
THE PERCENTAGE OF SEMANTO-SYNTACTIC EQUIVALENCE & NON-EQUIVALENCE OF QUR'ANIC CONSTRUCTIONS AND THE FOUR SELECTED
RENDERINGS INTO ENGLISH

Original Text No.	Pickthall	Ali	Shakir	Abdel Haleem
1.	✓	✓	✓	✓
2.	X	X	✓	X
3.	X	X	X	✓
4.	✓	X	X	X
5.	✓	✓	✓	✓
6.	✓	✓	✓	X
7.	X	X	X	✓
8.	✓	✓	X	X
9.	X	X	✓	✓
10a.	✓	✓	X	X
10b.	✓	✓	✓	X
11.	✓	✓	✓	✓
12.	✓	✓	✓	✓
13.	✓	X	✓	✓
14.	✓	✓	✓	X
15.	✓	✓	✓	✓
16.	X	✓	✓	X
17.	✓	✓	X	X
18.	✓	X	✓	X
19.	✓	✓	✓	✓
20.	✓	✓	✓	✓
21.	X	X	X	X
22.	✓	X	✓	X
23.	✓	✓	✓	✓
24.	X	X	X	X
25.	X	X	X	X
26.	✓	✓	✓	✓
27.	✓	✓	✓	✓
28.	✓	✓	✓	✓
29.	✓	✓	✓	✓
30.	✓	X	✓	X
31.	X	X	X	✓
32.	X	✓	X	X
33.	X	✓	✓	X
34.	X	✓	X	✓
35.	✓	✓	✓	✓
36.	X	X	X	X
37.	X	X	✓	✓
38.	X	X	X	X
39.	✓	X	✓	✓
40.	X	X	✓	✓
Semanto-Syntactic Equivalence	25	23	27	22
	60.97%	55.09%	65.85%	53.65%
Non-Equivalence	16	18	14	19
	39.02%	43.90%	34.14%	46.34%

V. CONCLUSIONS

The present study arrived at the following conclusions: first, the concepts of *tertium comparationis*, semanto-syntactic equivalence, and deep structures are definable and applicable within both Arabic and English linguistic traditions, as evidenced by their application in the selected data. Second, Krzeszowski's (1990) methodology has been successfully adapted to English-Arabic contrastive studies, confirming its validity for cross-linguistic comparison. Third, the assumption that Qur'anic constructions and their English renderings have identical deep structures and semanto-syntactic equivalence was approved. As shown in Table 4, equivalence percentages were high while non-equivalence remained comparatively low. Fourth, the study confirmed that the semantic role frameworks of Fillmore and Al-Khuli apply to both Arabic and English data, accurately identifying equivalence and non-equivalence in deep structures. Fifth, the structural similarity across both languages is supported, as equivalent constructions showed no syntactic or semantic constraints violations, unlike non-equivalent ones. Finally, a quantitative approach ensures a high

degree of semanto-syntactic equivalence between the deep structures of the Qur'anic constructions and their English renderings under scrutiny. Hence, the study bridges a significant gap in English–Arabic contrastive linguistics by validating Krzeszowski's model as a model of comparison.

Other conclusions that may be drawn from the present study are that there is no absolutely identical deep structure across Arabic and English, as the quantitative approach and the table of percentages show. This result may support the rejection of the claim of absolute universality across languages made by some linguists. However, languages can share some universal deep-level properties. Thus, universality is relational, abstract and constrained.

Finally, the following recommendations are set for future studies: first, it is highly recommended that the different types of equivalence proposed by Krzeszowski be distinguished, along with the parameters for investigating each. Second, it is recommended that the steps of applied and theoretical contrastive linguistics be distinguished. Third, it is recommended that the procedures for analyzing semantic roles, selectional restrictions, co-occurrence, lexical items, and transformations in texts be followed to investigate their identical deep structures and semanto-syntactic equivalence. Fourth, investigating the deep structures or semantic inputs is highly recommended for studying equivalence across Arabic and English. Fifth, the study of *tertium comparationis* in linguistics is recommended to adopt Krzeszowski's (1990) approach. Sixth, Fillmore's (1966) model and the modified versions of Al-Khuli (1999, 2000) are recommended for analyzing the underlying structures of Arabic and English data. Seventh, it is also highly recommended that semantic representations (i.e., semantic roles) across Arabic and English be implemented as corpus tools to reduce the time researchers spend. Finally, it is recommended that the present study may lead to English-Arabic contrastive generative grammar as a future schema.

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The Associative-Verbal Field of 'Qonaq' (Guest) in the Kazakh Language: Empirical Research

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Abstract—In Kazakh national consciousness, the concept of “konak – kut” (guest – for the good) is deeply rooted in the cultural code. The study explores whether this traditional notion has changed in modern society or retained its symbolic value. It focuses on how the word “guest” is represented in the linguistic consciousness of contemporary Kazakh youth. The research highlights links between language and consciousness, culture, nation, and society. Linguistic consciousness reflects a subjective worldview encoded through language. Studying these expressions reveals traits of collective and national identity. In a globalizing world, understanding how youth relate to traditional values is especially important. This interdisciplinary study uses linguistic material collected from fluent Kazakh speakers aged 17 to 25, offering insight into the ethno-cultural awareness of Kazakh youth. A free associative experiment was conducted to examine how young people perceive the word konak (guest), which carries idio-ethnic meaning. The stimulus word triggered 173 associations. These were analyzed to construct the associative-verbal field of “konak.” At the center of the field lies the word dastarkan, reflecting a strong link between youth consciousness and Kazakh hospitality traditions. The study also examined syntagmatic, paradigmatic, and phrasal relations within the field. In conclusion, the associative-verbal field of konak is richly structured, and Kazakh youth continue to maintain a strong connection to their cultural heritage through language, despite the impact of modern social changes.

Index Terms—linguistic consciousness, associative experiment, associative-verbal field, guest, stimulus

I. INTRODUCTION

A word and its meaning are considered in close connection with objective reality, the surrounding world, and the information stored in human consciousness. Ualiuly (2011) observes that “the structural content of the concept *қамшы* (whip) is quite complex, because the word naming this concept functions simultaneously as a unit of the linguistic sign system and as a unit of the ethnocultural system; therefore, a concept located at the intersection of linguistic and cultural signs can first be examined as a linguistic unit from both historical and contemporary perspectives”. Before identifying the ethnocultural information underlying a word or phrase, one must determine which concept the linguistic unit designates, that is, analyse the word’s meaning. From the denotative meaning of a lexical unit, further shades of meaning branch out. Thus, in addition to its nominative function, a hereditary function becomes apparent, and the unit’s links with the national worldview, with social etiquette, and with customary practice are revealed. Through the semantic structure of a word the national linguistic picture of the world is disclosed.

Within Kazakh linguistics, studies of this kind aim to characterise the national worldview through language. For example, Talgatqyzy et al. (2024), by examining the concept *мыңе* (camel), analyse not only its physical and biological features but also its semantic field as represented in historical records, literature, oral folklore, and religious texts. They likewise emphasise that *қонақжайлық* (hospitality) is highly valued in Kazakh culture: *қонақ күту* (receiving a guest) is regarded as a sacred duty and an honourable practice, and welcoming a guest with special respect and generosity demonstrates unity and mutual support (Talgatqyzy et al., 2024, p. 269).

The word *қонақ* (guest) is one of the lexical units that typify the Kazakh ethnocultural worldview. In Kazakh usage it conveys several meanings:

1. *Жолаушылап бара жатып, біреудің үйіне қонуға түскен бейтаныс адам* (lit. 'a stranger who stops at someone's house for the night while travelling');
2. *Үйге арнайы шақырылған сыйлы адам(дар)* (lit. 'an invited honoured guest');
3. figuratively, a philosophical notion that *әрбір адам өмірге мәңгілік емес* 'every human life is transient' (Sozdikqor.kz, 2025).

The motivation of *қонақ* is connected with the verb *қон* 'to spend the night', which reflects nomadic culture. Kaidar (2013) explains: "One of the most distinctive Kazakh traditions is hospitality. For centuries, welcoming an uninvited traveller considered *құдайы қонақ* (uninvited traveller who is treated as 'God's guest' in Kazakh tradition) and sending him off contented has been regarded as a moral obligation passed down through generations" (Kaidar, 2013, p. 593).

This statement shows a rule of etiquette rooted in nomadic life: even an unknown traveller must be welcomed with generosity. The first dictionary definition of *қонақ* is therefore directly linked to traditional society. Today, however, the second definition 'an invited honoured guest' is used more often. The number of people who host strangers overnight has clearly declined owing to changes such as the shift from nomadism to a settled way of life, socio-economic development, expansion of service industries, and new forms of interpersonal relations. Such changes are consistent with historical development: as society progresses, ways of life move from one stage to another; word meanings may broaden or narrow, their frequency may rise or fall, and lexemes may pass into active or passive layers of the vocabulary. Nevertheless, nationally specific customs associated with *қонақ* lavish hospitality, laying a *дастарқан* (festive table), offering great respect have been preserved to the present day.

In figurative usage, *қонақ* also conveys the idea that human life is finite. Illustrative lines include *Қарап тұрсам, дүние шолақ екен, Адамдар бір-біріне қонақ екен* (lit. 'When I look, life is short; people are guests to one another'); and Abai's reflection *Біріңе-бірің қонақ екенсің, өзің дүниеге де қонақ екенсің* (lit. 'You are a guest to each other, and you are also a guest in this world') in his 34th Word. The figurative meaning arising from the notion that a guest stays only for a limited time is widely used in contemporary Kazakh to convey vivid philosophical thought.

Identifying the images associated with *қонақ* in the linguistic consciousness of Kazakh youth and mapping the structure of its associative-verbal field constitute the main objectives of the present study. Such analysis is closely related to current issues in ethnopsycholinguistics concerning how language, cognition, and culture interact in shaping individual and collective identity.

II. LITERATURE REVIEW

The term *қонақ* (guest) is connected with the oldest layers of the Turkic worldview, has deep historical roots, and is closely intertwined with spiritual culture and values. In Mahmud al-Kashgari's dictionary a proverb is cited: *Ұма келсе, құт келер, – қонақ келсе, құт келер* (lit. 'If *Ұма* arrives, blessing arrives – if a guest arrives, blessing arrives'; *Ұма* 'guest'; meaning that a visitor brings prosperity and must be welcomed without disturbing him). The work also quotes the bayt: *Сорлы қонақ мұқтаж болып келсе егер, Сарылтпа оны, бар асыңды тездеп бер!* (lit. 'If a poor guest comes in need, do not distress him, quickly give all your food'; Qashqari, 2006, pp. 121-122). These passages show that the idea *қонақ – құт* 'guest equals blessing' is shared by Turkic peoples and that identical norms of etiquette for hosting guests were formed.

The word *қонақ* occupies an essential place in the content structure of the concept "hospitality". Whenever hospitality is mentioned, images of the Kazakh tradition of receiving guests and the linguistic units that encode it immediately come to mind. The ethnocultural semantics of *қонақ* in Kazakh linguistics is discussed in the works of Kaidar (2013) and in the "Culture-representative sub-corpus" (Kazakh National Corpus, 2020), where *қонақ* and *қонақжайлық* (hospitality) are explained as inseparable, semantically linked notions.

Kazakh contains numerous terms for different kinds of guests, revealing multiple facets of the guest's status in society. By thematic-semantic criterion the names are grouped as follows.

1. By invitation or purpose of arrival: *құдайы қонақ* (lit. 'God's guest'; uninvited traveller who must be honoured), *арнайы қонақ* (formally invited guest), *ерулікті қонақ* (guest reciprocated with a return feast), *қыдырма қонақ* (wandering guest), *бірсоқпа қонақ* (guest who stops once), *көлденең қонақ* (random passer-by guest), *шақырусыз қонақ* (guest without invitation), *қылғыма қонақ* (importunate guest).
2. By worth or reputation: *құтты қонақ* (auspicious guest), *ардақты қонақ* (honoured guest), *қадірлі қонақ* (respected guest), *арсыз қонақ* (shameless guest), *жақсы қонақ* (good guest), *жайлы қонақ* (agreeable guest), *жайсыз қонақ* (disagreeable guest), *жағымды қонақ* (pleasant guest), *жағымсыз қонақ* (unpleasant guest).
3. By mode of arrival: *жаяу қонақ* (guest on foot), *атты қонақ* (guest on horseback), *итті қонақ* (guest accompanied by a dog).
4. By social status: *қатын қонақ* (female guest), *қайырышы қонақ* (beggar guest). These lexical units reflect Kazakh hospitality culture, attitudes toward visitors, rules of interaction, and the guest's social role in traditional life while uncovering deep semantic layers of the word *қонақ*.

To express positive attitudes toward a guest or host, Kazakh employs proverbs and idioms such as *Құтты қонақ келсе, қой егіз табады* (lit. 'If a blessed guest arrives, the ewe bears twins'), *Қонақ қадірлі болса, қазан тез қайнайды* (lit. 'If the guest is valued, the pot boils quickly'), *қолы ашық* (lit. 'open-handed'; generous), *қонағын атқарды* (lit. 'saw the guest off with honour'). For negative evaluations: *Қонағын сыйламаған не баласын ұрар, не үйін сыпырар*

(lit. ‘One who shows no honour to a guest will beat his child or sweep his house’), *Құтсыз қонақ келсе, қораға қасқыр шабады* (lit. ‘If an ill-omened guest arrives, a wolf attacks the corral’), *Жағымсыз қонақ жатар уақытта келер* (lit. ‘An unpleasant guest comes at bedtime’), *Қонағым, өз үйіңді де ойлай отыр* (lit. ‘My guest, think also of your own home’), *қолы тар* (lit. ‘tight-handed’; stingy) (Kazakh National Corpus, 2020). Such stable units play an important role in interpreting the national-cultural specificity of the guest concept.

Scholarly works on the word *қонақ* and its associated notions treat the “hospitality” concept. The cognitive space of *қонақжайлық* in Kazakh is divided by Zhilkubayeva (2016) into several frames reflecting steppe norms, for example *Бөлінбеген ениі* ‘undivided share’, *Табақ тарту* ‘serving the dish’. Analysing hospitality from a linguocultural viewpoint, Onalbayeva et al. (2024) argue that despite modern forces globalisation, urbanisation, socio-economic change the key principles remain: generosity, respect for guests, care and mutual assistance continue as vital components of social interaction. They describe hospitality as a complex, dynamic system embodying spiritual and material values that has retained its relevance (Onalbayeva et al., 2024, pp. 1135-1136). Using a free-association method, the authors surveyed 109 respondents aged 20-70 in Almaty: 90 % Kazakh, 10 % Russian, Uyghur, Uzbek, Turkish, German. Among the reactions were *дастарқан* (lit. ‘festive table’) 7, *бай дастарқан* (lit. ‘abundant festive table’) 2, *тағам* (lit. ‘food’) 10, *туыс* (lit. ‘relative’) 5, *сүйіспеншілік* (lit. ‘affection’) 8, *бақыт* (lit. ‘happiness’) 8, *береке* (lit. ‘prosperity’) 5 (Onalbayeva et al., 2024, p. 1130). The presence of the same linguistic images in the responses of Kazakh youth to the stimulus *қонақ* indicates preservation of national identity, a point discussed further in Results and Discussion.

Samsitova (2011) compares the hospitality concept *қунақсыллық* in Bashkir and Kazakh, analysing shared language use. In Bashkir the cultural concept is represented by *қунақ* ‘guest’, derived from the Turkic verb *күн* ‘to stay overnight’. The scholar notes that the idea of an uninvited guest carries no negative connotation in Turkic languages; rather, it means *Allah’s guest*, who receives special honour (Samsitova, 2011, p. 4). Proverbs common to both nations include *Қонақ аз отырып, көп сынап* (lit. ‘A guest who stays briefly will criticise much’).

Ibraimova and Dosymbekova (2023) examine norms of greeting, honouring, thanking and bidding farewell to guests in Kazakh and Chinese linguocultures, finding similarities rooted in respect between young and old, seniors and juniors.

In her dissertation, Zhabayeva (2004) compares Kazakh, Russian, and English material words, idioms, proverbs describing the national-cultural distinctiveness of the “hospitality” concept. She points out that Kazakhs convey special courtesy with imperative verbs such as *Тәрлетіңіз!* (lit. ‘Please move to the honoured place’), and that terms like *қонақасы* (guest feast), *қонақаяқ* (special dish for guests), *қонаққәде* (guest gift ritual), *қонақ хақы* (guest’s right) have no exact Russian or English equivalents; in English culture *guest* usually refers only to an invited person (Zhabayeva, 2004).

Russian and Tatar fixed expressions on hospitality are analysed axiologically by Yunusova (2009). The study links perceptions of hospitality to tradition, myth and religion. A common value in Russian and Tatar phrases is recognition of the importance of human relationships and mutual respect between guest and host: *Коры табына қунақ утыртмыйлар* (Tatar: lit. ‘They do not seat a guest at an unspread table’), *В чем гостю воля, в том ему и честь* (Russian: lit. ‘Whatever the guest wishes is his honour’). Traits opposed to hospitality selfishness, standoffishness, stinginess are censured in both cultures, e.g. Tatar *Яман уз өенә узе қунақ* (lit. ‘A bad man is a guest in his own house’), *Саран белән төшкәнче, юмарт ярлыға төш* (lit. ‘Better to marry a generous pauper than a stingy rich man’); Russian *Зазвал гостей, глотать костей* (lit. ‘Invited guests, then gnaws bones’), *У него замок висит* (lit. ‘He has a lock hanging [on his door]’; i.e. he is inhospitable) (Yunusova, 2009).

The hospitality/guest concept has been compared across languages — in Russian–English idioms (Garipova, 2010), Russian–French proverbs (Zakharova, 2011), Russian–Chinese phrases (Zhang & Sayakhova, 2017), and Russian–Tajik materials (Tozaeva, 2022).

Investigating the Russian semantic field of *гость* (guest), Tall (2011) compares lexicographic and psycholinguistic definitions, noting differences. In Tall’s view, the psycholinguistic meaning (Sternin’s term) reveals the true sense of a word in linguistic consciousness and includes important cultural components not always detected by traditional semantic analysis (Tall, 2011).

Kambaralieva and Daba (2018) analyse the Kyrgyz concept *қонақ* (*konok*). Although dictionary definitions of *қонақ* and its synonym *мейман* are similar, association data show that *қонақ* occurs more often; the researchers place it at the core of the field and *мейман* in the near periphery. They argue that *қонақ* implies a visitor who stays overnight, whereas *мейман* leaves after the meal. In contemporary Kyrgyz culture the cognitive feature of *қонақ* overnight stay is gradually “lost” (in V. I. Karasik’s terms). Kyrgyz recognises four guest types: *чакырылган конок* (invited guest), *қудайы конок* (God’s guest), *чакырылбаган конок* (uninvited guest), *милдеттүү конок* (obligatory guest).

Thus, the words *қонақ* and hospitality represent universal moral values promoting virtue and conveying each nation’s worldview.

International research confirms that young people’s perception of the *гость* / *қонақ* concept is shaped by global sociocultural change. Olya et al. (2020) show that some urban Kazakhstani youth see traditional hospitality as limiting personal autonomy amid rising individualism, whereas Onalbayeva et al. (2024) demonstrate through free-association data featuring nucleus images such as «дастарқан» (festive table) and «құт-береке» (blessing-prosperity; a paired notion with no single-word English equivalent) that *қонақжайлық* still embodies respect, generosity and warmth as an emotional-ritual code of identity. Our earlier empirical work (Akhmetova et al., 2025) extends this line of inquiry,

showing that even sacred domestic lexemes like «бесік» (cradle), «садақ» (bow) and «үршік» (spindle) form dense associative networks that anchor enduring cultural values in the linguistic consciousness of Kazakh youth. At the same time, Yapıcı (2018) finds that contemporary youth re-frame hospitality practices to fit urban demographics and lifestyle demands, highlighting the guest concept's flexibility. Collectively, these studies portray *қонақ* as a dynamic construct whose symbolic core persists while its social expression adapts to modern contexts.

III. MATERIAL AND METHODS

The principal psycholinguistic method employed to reveal the images present in the linguistic consciousness of Kazakh youth was the free-association experiment. The survey-based experiment was carried out in written form from September 2024 to February 2025; personal data were kept confidential, and the results were used only in aggregated form for scientific purposes. Participants were 634 Kazakh students (317 female, 317 male) aged 17-25, studying in Kazakh-medium groups at L. N. Gumilyov Eurasian National University. The material was processed in R-Studio, and numerical indicators were obtained. In total, 173 reactions were recorded. Reaction frequencies were calculated; the ten most frequent words were prioritised, and the field was divided into a nucleus and a near periphery. Reactions are presented in the article as *дастарқан* (lit. 'festive table'; traditional Kazakh table lavishly laid for guests) 63 (9.72 %). Here *дастарқан* is the reaction word; 63 is its frequency; 9.72 % is the share of this association within the field.

The linguistic units in the associative-verbal field were then analysed from ethnolinguistic, cognitive, and gender perspectives, and the paradigmatic, syntagmatic, and phrasal links between the stimulus word and its associates were identified. Componential analysis was applied to describe the semantic structure of the word and its constituents; communicative-semantic analysis and grouping by shared features were used to examine usages. To interpret the meanings of the stimulus *қонақ* (lit. 'guest'; culturally, any person received with honour and generosity in a Kazakh home) and the reactions obtained, lexicographic resources (sozdikqor.kz) and literary databases (qazcorpus.kz, adebiportal.kz) were consulted.

IV. RESULTS AND DISCUSSION

The analysis of the associative-verbal field *Қонақ* showed that, in the linguistic consciousness of the surveyed Kazakh youth, the stimulus word elicited 173 reactions: *дастарқан* (lit. 'festive table'; traditional table lavishly laid for guests) 63 (9.72 %); *береке* (lit. 'prosperity, abundance') 53 (8.18 %); *құт* (lit. 'blessing') 53 (8.18 %); *адам* (lit. 'person') 20 (3.09 %); *туыс / туысқан* (lit. 'relative') 20 (3.09 %); *тамақ* (lit. 'food') 18 (2.78 %); *той* (lit. 'celebration, feast') 18 (2.78 %); *құдайы қонақ* (uninvited traveller treated as "God's guest") 15 (2.31 %); *үй* (lit. 'house') 13 (2.01 %); *күту* (lit. 'to host / to await') 12 (1.85 %); *құт-береке* (lit. 'blessing-prosperity') 12 (1.85 %); *сыйлы адам* (lit. 'honoured person') 12 (1.85 %); *қуаныш* (lit. 'joy') 11 (1.70 %); *төр* (lit. 'honoured place in a Kazakh home') 10 (1.54 %); *қонақ* (lit. 'guest') 10 (1.54 %); *ас* (lit. 'meal') 9 (1.39 %); *құрмет* (lit. 'respect') 9 (1.39 %); *мейман* (lit. 'guest') 8 (1.23 %); *сыйлы* (lit. 'honoured') 8 (1.23 %); *ет* (lit. 'meat') 7 (1.08 %); *ырыс* (lit. 'well-being, plenty') 7 (1.08 %); *құтты* (lit. 'auspicious') 7 (1.08 %); *құдайы* (lit. 'of God; sacred') 7 (1.08 %); *мереке* (lit. 'holiday') 6 (0.93 %); *үй жинау* (lit. 'house cleaning') 6 (0.93 %); *жақындар* (lit. 'close ones') 5 (0.77 %); *жиын* (lit. 'gathering') 5 (0.77 %); *сыйлау* (lit. 'to honour') 5 (0.77 %); *қонақжайлық* (lit. 'hospitality') 5 (0.77 %); *үйге келген адам* (lit. 'person who came to the house') 5 (0.77 %); *дайындық* (lit. 'preparation') 4 (0.62 %); *дос* (lit. 'friend') 4 (0.62 %); *көрші* (lit. 'neighbour') 4 (0.62 %); *сарқыт* (lit. 'food sent home with a guest') 4 (0.62 %); *сый* (lit. 'gift') 4 (0.62 %); *үстел* (lit. 'table') 4 (0.62 %); *ақша* (lit. 'money') 3 (0.46 %); *бешбармақ* (national meat-and-noodle dish) 3 (0.46 %); *бөтен адам* (lit. 'stranger') 3 (0.46 %); *жақын адам* (lit. 'close person') 3 (0.46 %); *көрпе* (lit. 'quilt') 3 (0.46 %); *мейрам* (lit. 'feast day') 3 (0.46 %); *несібе* (lit. 'allotted share; sustenance') 3 (0.46 %); *шақыру* (lit. 'invitation') 3 (0.46 %); *құрметті адам* (lit. 'respected person') 3 (0.46 %); *ас беру* (lit. 'to serve a memorial meal') 2 (0.31 %); *бақыт* (lit. 'happiness') 2 (0.31 %); *гость* (Russian 'guest') 2 (0.31 %); *жұмыс* (lit. 'work') 2 (0.31 %); *келу* (lit. 'arrival') 2 (0.31 %); *келі адам* (lit. 'sacred person') 2 (0.31 %); *кісі* (lit. 'person, visitor') 2 (0.31 %); *күлкі* (lit. 'laughter') 2 (0.31 %); *көктем* (lit. 'spring') 2 (0.31 %); *көңіл* (lit. 'mood, feeling') 2 (0.31 %); *нағашы* (lit. 'maternal relative') 2 (0.31 %); *сыйласу* (lit. 'exchange of respect') 2 (0.31 %); *сыйлық* (lit. 'present') 2 (0.31 %); *таныс* (lit. 'acquaintance') 2 (0.31 %); *қонақасы* (lit. 'guest feast') 2 (0.31 %); *құрметтеу / құрмет көрсету* (lit. 'to show respect') 2 (0.31 %).

The set of single-occurrence responses 1 (0.15 %) consists of 112 items: *алыстағы ағайындар* (lit. 'relatives from afar'); *арқа-жарқа әңгіме* (lit. 'heartly conversation'); *асар* (traditional collective labour to help a neighbour); *асығу* (lit. 'to hurry'); *аяқ асты келген адам* (lit. 'person who arrived unexpectedly'); *ағамның келуі* (lit. 'my elder brother's visit'); *бауырым* (lit. 'my brother'); *дәстүр* (lit. 'tradition'); *ел* (lit. 'people; homeland'); *жайлылық* (lit. 'comfort'); *жақсы* (lit. 'good'); *жақын* (lit. 'close'); *жақындық* (lit. 'closeness'); *жезде* (lit. 'brother-in-law'); *жиналу* (lit. 'gathering'); *жинау* (lit. 'to tidy up'); *жол жүру* (lit. 'travelling'); *жолаушы* (lit. 'traveller'); *зал комнатасы* (Russian + Kazakh 'hall room'); *келген адам* (lit. 'arrived person'); *киелі* (lit. 'sacred'); *киелі жан* (lit. 'sacred soul'); *қрасавчик* (Russian 'handsome guy'); *күтпеген адам* (lit. 'unexpected person'); *күтуші* (lit. 'host / caretaker'); *күшті адамдар* (lit. 'strong people'); *кәмпит* (lit. 'candy'); *көңіл-күй* (lit. 'mood'); *манты* (Central-Asian dumplings); *машина* (lit. 'car'); *Проблема үй жинау керек* (Russian + Kazakh 'problem: need to clean the house'); *стол* (Russian 'table'); *сырт* (lit. 'outside'); *такси* (lit. 'taxi'); *тамақ беру* (lit. 'to serve food'); *туған күн* (lit. 'birthday'); *төр орын* (lit. 'honoured

seating place’); *шай* (lit. ‘tea’); *шай беру* (lit. ‘to serve tea’); *шай ишу* (lit. ‘to drink tea’); *шалдар тобы* (lit. ‘group of old men’); *шаңыраққа береке әкелетін* (lit. ‘bringing prosperity to the household’); *шу* (lit. ‘noise’); *шулы* (lit. ‘noisy’); *шығып* (lit. ‘going out’); *қапылыс* (lit. ‘sudden rush’); *қиындық* (lit. ‘difficulty’); *қой* (lit. ‘sheep’); *қолға су құю* (lit. ‘to pour water over hands’ guest-honouring ritual); *қыз* (lit. ‘girl’); *құда* (lit. ‘match-relative’); *құман* (lit. ‘ewer’); *құтты қонақ* (lit. ‘auspicious guest’); *үйге алыстан келген адам* (lit. ‘person who came from far to the house’); *үйге келген бір кісі* (lit. ‘one person who came home’); *үйге келген қонақ* (lit. ‘guest who arrived at home’); *үйге келетін бөтен адамдар* (lit. ‘strangers who come to the house’); *үйге шақыратын адамдар* (lit. ‘people who invite to the house’); *үйдің адамы емес* (lit. ‘not a household member’); *үйдің берекесі* (lit. ‘household prosperity’); *үлкендер* (lit. ‘elders’); *үстел жаяу* (lit. ‘to lay the table’); *әңгімелесу* (lit. ‘conversation’); *5 қонақ* (lit. ‘five guests’); *адам шақыру* (lit. ‘to invite people’); *ас дайындау* (lit. ‘to prepare food’); *ас ишу* (lit. ‘to eat food’); *асылған ет* (lit. ‘boiled meat’); *ағайын* (lit. ‘relatives’); *ақ дастарқан* (lit. ‘white festive table’; symbol of hospitality); *босаға* (lit. ‘threshold’); *бөгде адам* (lit. ‘outsider’); *бөтен үйден келген сыйлы адам* (lit. ‘honoured person from another house’); *дайындалу* (lit. ‘to get ready’); *демалыс* (lit. ‘rest, holiday’); *дөңгелек үстел* (lit. ‘round table’); *есік* (lit. ‘door’); *ет асу* (lit. ‘to cook meat’); *жылу* (lit. ‘warmth’); *жұрт* (lit. ‘people, company’), and other conceptually related items referring to hospitality, kinship, and domestic traditions.

Although participants were asked to supply a single-word association, the answers include both individual words and multi-word phrases.

According to the lexical-grammatical relations between stimulus and reactions, three types of links were identified within the associative field of *қонақ* (lit. ‘guest’).

1. Syntagmatic links – syntactic relations between the stimulus and a response that can form a word-group or a predicate. Examples: *Қонақ – құту* (lit. ‘to host’), *сыйлы* (lit. ‘honoured’), *құтты* (lit. ‘auspicious’), *шақыру* (lit. ‘invitation’), *құдайы* (uninvited traveller honoured as “God’s guest”), *ас беру* (lit. ‘to serve a memorial meal’), *сыйласу* (lit. ‘exchange of respect’), *дайындалу* (lit. ‘preparation’), *ет асу* (lit. ‘to boil meat’), *көп* (lit. ‘many’), *тамақ беру* (lit. ‘to give food’), *тамақ жасау* (lit. ‘to cook’). Such pairs illustrate grammatical patterns like *қонақты құту* (lit. ‘to host a guest’), *қонақ шақыру* (lit. ‘to invite a guest’), *қонаққа тамақ беру* (lit. ‘to give food to a guest’).
2. Paradigmatic links – relations among words of the same grammatical class. Examples: *Қонақ – дастарқан* (lit. ‘festive table’), *тамақ* (lit. ‘food’), *той* (lit. ‘celebration’), *адам* (lit. ‘person’), *туыс* (lit. ‘relative’), *төр* (lit. ‘honoured place’), *қонақ* (lit. ‘guest’), *ас* (lit. ‘meal’), *мейман* (lit. ‘guest’), *мереке* (lit. ‘holiday’), *жиын* (lit. ‘gathering’), *көрші* (lit. ‘neighbour’), *сарқыт* (lit. ‘food sent home with a guest’). These designate who the guest is, to whom the term applies, or objects used to honour a guest.
3. Phrasal links arise between the stimulus and reactions that express a more complete thought: *Қонақ – Бөтен үйден келген сыйлы адам* (lit. ‘honoured person from another household’); *Үйге алыстан келген адам* (lit. ‘person who came from afar’); *Үйге келген бір кісі* (lit. ‘one person who came to the house’); *Үйге келетін сыйлы адамдар* (lit. ‘honoured people who come to the house’); *Проблема үй жинау керек* (lit. ‘problem: need to clean the house’). The first sentences describe the guest’s nature, whereas the last conveys the respondent’s subjective concern about the stimulus.

These link types show that mental images in an individual’s linguistic consciousness are tied to specific lexical-grammatical devices. Language and mind “form a unity; living together they complement each other, language is the direct reality of thought and consciousness” (Mambetova, 2011, p. 120). A person’s thinking, worldview, cultural experience and communicative style influence linguistic consciousness; therefore, each respondent’s mind determines which linguistic unit to choose when writing associations. Lexical items and grammatical constructions in the field reveal the content of that consciousness: special respect for a guest is reflected through *қонақты құту* (lit. ‘hosting a guest’), *сыйлы адам* (lit. ‘honoured person’), *қуаныш* (lit. ‘joy’), *төр* (lit. ‘honoured place’), *құрмет* (lit. ‘respect’). As Diagram 1 shows, the highest-frequency units are preserved as single words in the linguistic consciousness of the youth.

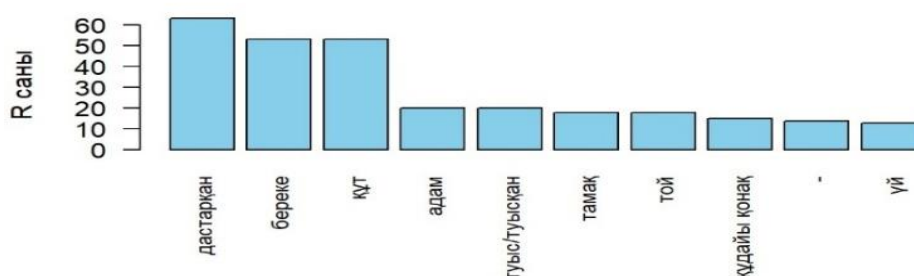


Figure 1. Reactions to the Stimulus Word *Қонақ* (Guest)

Note: The vertical bars represent the number of responses (R) for each associative word related to the stimulus *қонақ* (guest). The words along the x-axis include: *дастарқан*, *береке* (blessing), *құт* (prosperity), *адам* (person), *туыс/туысқан* (relative), *тамақ* (food), *той* (celebration), *құдайы қонақ* (honored guest), ' (no response), and *үй* (home). The height of each bar reflects the frequency with which the word was mentioned by participants.

Қонақ associative-verbal field analysis showed that its nucleus is formed by the reaction *дас тарқан* (lit. ‘festive table’; a cloth or oil-cloth spread on the floor or on a table when eating), recorded in 63 responses. In Kazakh the word is used both literally and figuratively. In its nominative sense *дас тарқан* denotes the thick cloth itself; etymologically it comes from Persian *dastar* ‘napkin’. Varieties include sets for a small family, for entertaining guests, for tea or for meat (Sozdikqor.kz, 2025). Figuratively, *дас тарқан* symbolises abundance, blessing, hospitality, open-heartedness, generosity, unity. Whether at celebrations or funerals, a *дас тарқан* is laid to show honour. The term thus conveys goodwill, gratitude and a gathering of kin, which Zhanabekova (2011) analyses these symbolic meanings in depth. Ethnographers such as Arutiunov and Shakhanova note that sharing a *дас тарқан* constitutes not merely eating but a culturally codified system tied to ritual practice (as cited in Zhanabekova, 2011). One respondent even wrote *ақ дас тарқан* (lit. ‘white festive table’; spotless cloth offered with pure intentions) 0.15 %. Hence, for Kazakh youth *дас тарқан* is a sacred, meaningful concept; its association with *қонақ* demonstrates preservation of a deep cultural code.

With *дас тарқан* are closely linked reactions naming food, meals and preparatory actions: *тамақ* (lit. ‘food’), *ас* (lit. ‘meal’), *ет* (lit. ‘meat’), *сарқым* (lit. ‘food sent home with a guest’), *үстел* (lit. ‘table’), *бешбармақ* (national meat-and-noodle dish), *қонақасы* (lit. ‘guest feast’), *ас дайындау* (lit. ‘to prepare food’), *ас ийу* (lit. ‘to eat food’), *асылған ет* (lit. ‘boiled meat’), *ет асу* (lit. ‘to boil meat’), *кәмпит* (lit. ‘candy’), *манты* (central-Asian dumplings). These pairs link “object to object” (*дас тарқан – тамақ, ас, ет*) or “object to action” (*дас тарқан – ас дайындау*) in whole–part relations, showing that in youth consciousness the word *қонақ* evokes the festive table, various foods and their preparation, all firmly tied to the tradition of entertaining guests.

Near the nucleus lie *береке* (lit. ‘prosperity’), *құт* (lit. ‘blessing’), *адам* (lit. ‘person’), *туыс / туысқан* (lit. ‘relative’), *той* (lit. ‘celebration’), *құдайы қонақ* (uninvited guest honoured as “God’s guest”), and *үй* (lit. ‘house’). The associations *қонақ – береке / құт* imply that a guest brings plenty and good fortune. Related items *құт-береке* (lit. ‘blessing-prosperity’), *ырыс* (lit. ‘well-being’), *бақыт* (lit. ‘happiness’), *құтты* (lit. ‘auspicious’) confirm that the Turkic idea “guest equals blessing” survives in the ethnocultural consciousness of Kazakh youth.

The reaction *адам* connects semantically with other single-word or phrasal answers describing the person: *кici* (lit. ‘visitor’), *сыйлы адам* (lit. ‘honoured person’), *үйге келген адам* (lit. ‘person who came to the house’), *бөтен адам* (lit. ‘stranger’), *жақын адам* (lit. ‘close person’), *құрметті адам* (lit. ‘respected person’), *киелі адам* (lit. ‘sacred person’), *үйге алыстан келген адам* (lit. ‘person who came from afar’). Thus, in youth consciousness *қонақ* is revealed through diverse human qualities, answering “Who is the guest?” and “What kind of person is he?”

Қонақ – туыс/туысқан (guest – relative) is one of the ten most frequent reactions. The proverb *Жақыныңды жаттай сыйла, жат көңілінен түңілісін* (lit. ‘Honour your kin as if they were strangers so that strangers may lose their reluctance’) is reflected in Kazakh youths’ ethnocultural consciousness. Within the field, the stimulus *қонақ* links semantically with *жақындар* (lit. ‘close ones’), *нағашы* (lit. ‘maternal relative’), *алыстағы ағайындар* (lit. ‘relatives from afar’), *ағамның келуі* (lit. ‘my elder brother’s visit’), *бауырым* (lit. ‘my brother’), *жақын* (lit. ‘close’), *жезде* (lit. ‘brother-in-law’) and *тума-туыс* (lit. ‘kin, relatives’), all expressing the respect shown among kin in Kazakh custom. Honouring and entertaining relatives is an inseparable part of Kazakh hospitality; the *қонақ – туыс/туысқан* pairing in youth consciousness therefore mirrors cultural-social relations and a collective way of life centred on extended family.

As noted above, the association *қонақ – тамақ* (guest – food) evokes the *дас тарқан* (festive table) and dishes offered to guests (*ет* ‘meat’, *бешбармақ* ‘national meat dish’, *кәмпит* ‘candy’, etc.). Beyond its material meaning, food embodies national identity and cultural value. Yapici, discussing food and identity in Central Asia, argues that communal eating is a vital element of hospitality: such gatherings display generosity and respect and preserve ancient traditions, affirming household status and community cohesion (Yapici, 2018). In Kazakh culture every visitor must taste something from the household table; plentiful, varied dishes signify honour, explaining why *тамақ* appears in the youths’ answers.

In the linguistic consciousness of young respondents *қонақ* is also associated with *той* (lit. ‘celebration, feast’). In Kazakh culture the meanings of *қонақ* and *той* are closely linked: *той* names the gathering or festivity, while those invited are called *қонақ*. Thus, mentioning *той* together with *қонақ* is natural, for a *той* is an event where kin and friends assemble, hospitality etiquette is observed, and social bonds are strengthened. The word *той* designates the important occasion that prompts invitations, and *қонақ* denotes its principal participant. We therefore regard the *той* reaction as a response grounded in tradition and lived experience. Other answers in the field *жиын* (lit. ‘gathering’), *той-думан* (lit. ‘festive revelry’), *туған күн* (lit. ‘birthday’), *шақыру қағазы* (lit. ‘invitation card’) link logically with *той*, further elaborating the mental image of celebration held by Kazakh youth.

What does the reaction *құдайы қонақ* (uninvited traveller treated as “God’s guest”) signify within the *Қонақ* associative-verbal field? As noted earlier, Kazakh (and other Turkic) tradition distinguishes several guest types, one of which is *құдайы қонақ*. The encyclopaedia *Қазақтың этнографиялық категориялар, ұғымдар мен атаулары* defines this as *ат арылтып алыстан келе жатып үйге түскен, шаңырақ иесіне ешбір таныстығы, туыстығы жоқ бейтаныс жолаушы* (lit. ‘a stranger travelling from afar who stops at a house without any acquaintance or kinship to the host’) (Sozdikqor.kz, 2025). In today’s life especially in cities such guests are rare, yet the term persists in the linguistic consciousness of Kazakh youth.

Among the frequent reactions is *үй* (lit. ‘house, dwelling’). With respect to the stimulus *қонақ* this word carries two senses: (1) the dwelling where guests are received, and (2) *қонақ үй* (lit. ‘guest house’, hotel) where travellers stay while away from home. The presence of *қонақ үй* in modern linguistic consciousness reflects urbanisation, globalisation, and

service-sector growth, indicating that people increasingly choose commercial accommodation rather than a relative's or friend's home evidence of social change influencing linguistic consciousness.

For comparison we can cite Tall's (2011) study of the Russian associative field for *гость* (guest). Drawing on the associative dictionary compiled by Karaulov et al. (2002), Tall lists the following psycholinguistic features of Russian hospitality: most guests are close friends; they arrive on foot; hosts welcome them gladly; uninvited guests are disliked; visits occur in the evening; a guest brings a gift, cake, or flowers; the table is laid and food offered; before arrival the house is tidied, crystal is set out, festive clothes are worn; guests may be received in the kitchen; hosts and guests chat and exchange news (Tall, 2011, p. 9).

Similarities were discovered between meanings in the Kazakh *Қонақ* field and those found in Russian associations. Typical examples include welcoming a guest with open arms and joy, honouring and hosting the guest, laying a *дәстарқан* (lit. 'festive table') and offering varied dishes, tidying the house in advance, guests arriving with presents, and spending relaxed time in conversation. Yet each culture also has its own distinctions. In the Kazakh data the reaction *қонақ – дос* (lit. 'guest – friend') does occur, but the guest is associated far more often with kinship terms. A further Kazakh-specific feature is the reaction *көрші* (lit. 'neighbour'). While the basic meaning is "people living in the adjacent house," its culture-representative sense is broader. In traditional Kazakh society the neighbouring household and village hold special moral weight: relations rest on harmony and mutual respect. Even without blood ties such neighbours are called *құдайы көрші* (lit. 'God-given neighbour') and are treated with particular honour. The notion of *көрші ақысы* (lit. 'the neighbour's due') embraces norms such as avoiding harm, giving help in hardship, assisting with guests and everyday tasks (Kazakh National Corpus, 2020). Its presence among the associations shows that the concept of the neighbour remains active in young people's ethnocultural consciousness.

Whether a guest is invited or not, only a few responses convey negative overtones e.g. *Проблема, үй жинау керек* (lit. 'problem: need to clean the house'), *қапылыс* (lit. 'rush'), *қиындық* (lit. 'difficulty') whereas reactions with positive meaning (*береке* 'prosperity', *құт* 'blessing', *құдайы қонақ* 'God's guest', *сыйлы адам* 'honoured person', *қуаныш* 'joy', *құтты* 'auspicious', *ырыс* 'well-being', *құрметті* 'respected', *киелі адам* 'sacred person', etc.) dominate the field. The word *қонақ* also evokes travel: rather than a pedestrian, the mental image is "someone who has journeyed from afar" as shown by associations such as *жөлаушылап алыстан келген ағайындар* (lit. 'relatives who travelled from far away'), *жол жүру* (lit. 'travelling'), *машина* (lit. 'car'), *такси* (lit. 'taxi'). No responses mention time of day, yet *қонақ – көктем* (lit. 'guest – spring') appeared in two questionnaires.

In the Russian field the guest is linked with bringing *подарок, торт, цветы* ('a present, cake, flowers'). By contrast, along with *сыйлық* (lit. 'gift') the Kazakh field contains *сарқыт* (lit. 'food taken home from the host's table') 4×. *Сарқыт* is an ethnographic term with idiographic semantics: "food dried curds, cheese, sweets, etc. brought home from a guest meal so that children or elders may taste the *дәстарқан* fare; also, food left by guests or elders and eaten in the belief that their good qualities will be transferred" (Sozdikqor.kz, 2025). Because this custom is still practised, the word is firmly fixed in the linguistic consciousness of Kazakh youth.

In Russian hospitality the host may set out crystal dishes and dress in festive clothes, whereas in Kazakh youths' associations only *ыдыс* (lit. 'dish'), *ыдыс-аяқ* (lit. 'tableware') and *құман* (lit. 'ewer') appeared (3 responses in total); not a single respondent mentioned festive clothing. We assume that the idea of crockery surfaces only three times because, as a part-for-whole element, it is already incorporated into the semantic structure of *дәстарқан* (festive table). While Russian respondents picture receiving guests in the kitchen, Kazakh youth associate *қонақ* with *төп* (lit. 'honoured place in the house') 10, *төп орын* (lit. 'seat of honour') 1 and *зал комнатасы* (Rus.+Kaz. 'parlour room') 1, confirming awareness of the custom of seating a guest in the most respected spot. In Kazakh tradition *төп* denotes "the place of highest honour where esteemed guests or elders sit" (Sozdikqor.kz, 2025).

Another feature of the Kazakh field is the mention of core national dishes for guests: *ас* (lit. 'meal') 9, *ет* (lit. 'meat') 7, *беишбармақ* (national meat-and-noodle dish) 3, *ас беру* (lit. 'to serve a memorial meal') 2, *асылған ет* (lit. 'boiled meat') 1. These associations convey the cultural specificity of entertaining guests with traditional food.

Regarding gender, the nucleus word *дәстарқан* appears mostly in women's answers (43), whereas most men associate *қонақ* with *береке* (lit. 'prosperity') 25 (see Diagram 2). Thus, in female linguistic consciousness the guest is pictured through the practical setting of hospitality, whereas in male consciousness the guest's symbolic meaning bringing abundance prevails.

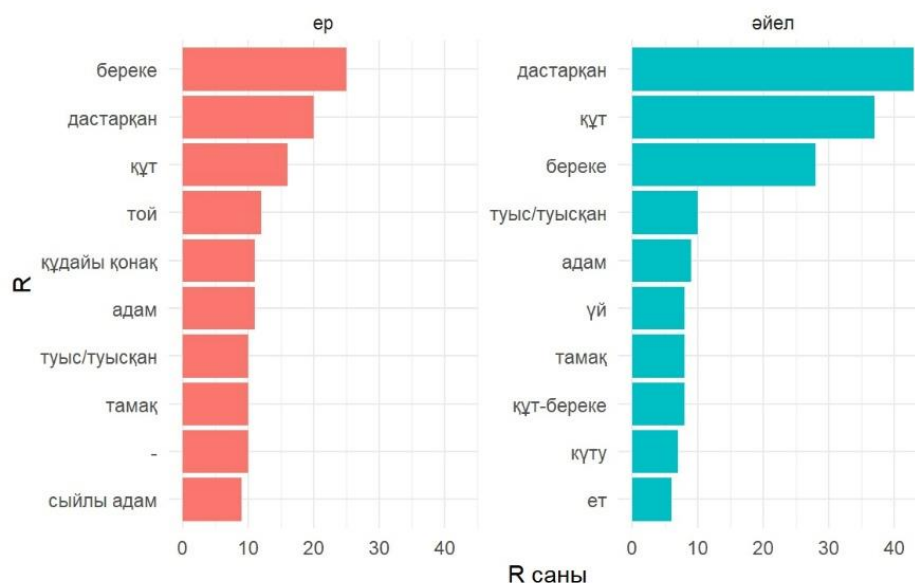


Figure 2. Male and Female Reactions to the Stimulus Word Қонақ (Guest)

Note: The horizontal bars represent the number of responses (R) given by male (ер) and female (әйел) participants to the stimulus қонақ (guest). The associative words on the y-axis for men include: береке (blessing), дастарқан, құт (prosperity), той (celebration), құдайы қонақ (honored guest), адам (person), туыс/туысқан (relative), тамақ (food), – (no response), and сыйлы адам (respected person). For women, the associative words include: дастарқан, құт (prosperity), береке (blessing), туыс/туысқан (relative), адам (person), үй (home), тамақ (food), құт-береке (blessing and prosperity), күту (welcoming), and ет (meat). The length of each bar indicates how frequently that word was mentioned by respondents of each gender.

Beyond дастарқан (lit. ‘festive table’) and береке (lit. ‘prosperity’), men and women share several associations: құт (lit. ‘blessing’), туыс / туысқан (lit. ‘relative’), адам (lit. ‘person’), тамақ (lit. ‘food’). These answers clearly show the social, everyday and cultural importance of the guest concept across Kazakh society.

Proverbs such as Әйелдің бір көркі – дастарқан (lit. ‘A woman’s beauty includes her festive table’) and Бәла тілеген әйел үйге келген қонаққа дастарқан жаяды (lit. ‘A woman who seeks blessing spreads the table for a guest’) together with experiment reactions күту (lit. ‘to host’), үй (lit. ‘house’), ет (lit. ‘meat’) reflect the woman’s role in a Kazakh household: laying the table and preparing food for guests.

Among men the word дастарқан appears 20 times, but less often than among women (43). By contrast, той (lit. ‘celebration’) occurs more in men’s answers (men – 12; women – 6), as do құдайы қонақ (uninvited “God’s guest”: men – 11; women – 4) and сыйлы адам (lit. ‘honoured person’: men – 9; women – 3). In male consciousness the guest is linked to special events, guest type and guest status.

The conclusion is that men’s linguistic consciousness foregrounds traditional notions of spiritual or social significance, whereas women’s responses emphasise concrete, material aspects of everyday culture. In other words, women’s images relate to daily household practice, while men’s relate to more abstract cultural values. Fourteen respondents did not supply an answer (or wrote illegibly); ten of them were men. These findings illustrate the interplay of national-cultural awareness and gendered world-views. Overall, the study is noteworthy for its naturalness, since it deals not with “the real world” or scholarly explanations but with the everyday perceptions and understandings of ordinary people (Bernárdez, 2010, pp. 24-25).

V. CONCLUSION

The analysis of the associative-verbal field Қонақ (guest) revealed several semantic structures and cultural interpretations present in the linguistic consciousness of Kazakh youth:

- The concept қонақ is perceived not only figuratively as a құт-береке әкелуші (lit. ‘bringer of blessing and prosperity’) but also as an honoured, respected person.
- A guest is understood in close connection with traditional culture: showing respect, preparing in advance, laying a дастарқан (lit. ‘festive table’), serving national dishes, seating in the мәр (lit. ‘place of honour’), engaging in conversation, creating a cheerful atmosphere, and offering сарқым (lit. ‘portion of food taken home by the guest’).
- In youth consciousness the guest is classified into various social groups such as құдайы қонақ (uninvited “God’s guest”), тума-туыс (lit. ‘blood relatives’), бөзде адам (lit. ‘stranger’), көрші (lit. ‘neighbour’).
- Lexico-grammatical links between the stimulus and reactions operate on syntagmatic, paradigmatic and phrasal levels.
- Gender differences appear: for men the guest holds more symbolic meaning, whereas for women the associations are rooted in everyday household practice.
- Although some cognitive parallels with Russian culture emerged, clear intercultural distinctions remain.

- The field is dominated by positively charged units.

In sum, the linguistic units found in the *Қонақ* field supplement dictionary definitions, uncover deep layers in the semantic structure of the word, and through logical-semantic links with other items convey key information about traditional culture and national values preserved in the minds of Kazakh youth. These results can inform the compilation of an associative dictionary, comparative studies of linguistic consciousness, and research on the cultural-linguistic profiles of different social groups.

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Unwarranted Assumption Fallacies: A Primary Cause of Argumentative Deficiencies in Thesis Proposals

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Abstract—This study seeks to identify and critically examine recurring patterns of unwarranted assumption fallacies that commonly arise in the construction of arguments, particularly those rooted in hasty generalizations and the use of logically irrelevant evidence. Drawing upon a qualitative content analysis of relevant scholarly literature and selected case studies, the investigation focuses on five prominent categories of fallacious reasoning: false causality based on irrelevant premises, premature generalizations derived from insufficient or non-representative data, hastily formulated claims, immature or weakly substantiated conclusions, and arguments relying on tangential or unrelated evidence. The analytical framework emphasizes the relationship between claims and their supporting evidence, assessing how inconsistencies and logical disconnects compromise argumentative validity. The findings reveal that all five fallacy types significantly diminish the strength, coherence, and credibility of academic arguments, often leading to misleading or erroneous conclusions. False causality typically emerges from unwarranted cause-effect attributions, while hasty generalizations are frequently grounded in anecdotal or statistically unrepresentative observations. Similarly, premature claims and immature conclusions reflect a lack of critical depth in reasoning, and the use of irrelevant evidence introduces logical discontinuities that weaken argumentative structure. These insights underscore the necessity of deliberate and rigorous evidence selection, as well as methodologically sound reasoning practices, in constructing robust and persuasive academic discourse. In doing so, the study contributes to a deeper understanding of argumentative fallacies and their implications for the integrity of scholarly communication.

Index Terms—unwarranted assumption fallacies, hasty generalization, irrelevant evidence, flawed reasoning, argument analysis

I. INTRODUCTION

In the context of higher education, the thesis proposal serves as both a cognitive and rhetorical milestone in a student's academic trajectory. It marks the transition from passive knowledge consumption to active scholarly inquiry, requiring students to formulate research problems, synthesize relevant literature, and design methodologically sound investigations (Garcia-Gorrostieta & López-López, 2018). Beyond its administrative function, the proposal embodies a student's ability to participate meaningfully in disciplinary discourse, employing structured reasoning, credible evidence, and epistemic awareness (Abdulai & Owusu-Ansah, 2014; Prasantham, 2023; Tiwari, 2023). However, empirical observations and supervisory experience across graduate programs consistently reveal persistent difficulties among students in articulating coherent, logically substantiated arguments—particularly in aligning claims with appropriate warrants and evidence.

One pervasive issue in postgraduate academic writing is the presence of logical fallacies, especially those categorized as unwarranted assumptions. These include errors such as hasty generalization, false cause, and appeals to authority—reasoning flaws that often arise from inadequate engagement with literature, insufficient critical thinking, or misunderstanding of argumentative structures. Such fallacies not only weaken the rhetorical persuasiveness of the text but also compromise its epistemic credibility, thereby undermining the foundational purpose of the thesis proposal. Despite the availability of writing support programs and instructional materials, students continue to struggle with developing arguments that meet the rigorous demands of academic logic and discourse conventions.

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Existing studies have examined students' difficulties in organizing thesis components such as the introduction, literature review, and methodology (Mali, 2023; Pardede, 2015). Others have explored the structural and linguistic features of academic writing through models of argumentation such as Toulmin's framework. Yet, the presence and nature of logical fallacies—particularly fallacies of unwarranted assumption—within the thesis proposals of postgraduate students remain underexplored. This represents a significant research gap, especially given that fallacious reasoning can obscure research aims, distort methodological clarity, and reduce the scholarly value of a proposal. Moreover, while fallacies have been studied in various genres such as advertisements, debates, and media discourse, their manifestation in formal academic writing—arguably the highest-stakes genre for students—has not received proportional scholarly attention.

From a rhetorical and pedagogical standpoint, identifying and understanding the presence of logical fallacies in student writing is not merely a diagnostic task; it is an epistemological imperative. The ability to construct fallacy-free arguments reflects not only logical competence but also the student's alignment with the norms of scientific reasoning and academic integrity. Furthermore, such competence serves as a foundation for future scholarly work, influencing how students formulate hypotheses, critique literature, interpret data, and present findings. Strengthening this dimension of academic literacy is essential for cultivating critically reflective researchers capable of engaging with complex knowledge systems and contributing meaningfully to their fields.

Against this backdrop, the present study aims to (1) identify and categorize instances of fallacies of unwarranted assumption in postgraduate thesis proposals, and (2) examine the rhetorical and structural factors that contribute to their occurrence. By focusing specifically on written academic texts within the Indonesian Language Education postgraduate context, this research offers a nuanced understanding of how flawed reasoning emerges in scholarly writing. In doing so, it seeks to inform the development of pedagogical strategies and rhetorical interventions that enhance argumentative quality, thereby improving academic writing instruction and supporting the broader goal of producing logically sound, epistemically robust scholarship.

II. LITERATURE REVIEW

The ability to construct coherent, logically sound, and rhetorically persuasive arguments is a defining feature of advanced academic literacy, especially at the postgraduate level. Yet, extensive empirical evidence has revealed that many students continue to face significant challenges in fulfilling these expectations. Mali reported recurring structural and rhetorical weaknesses in students' thesis proposals, particularly in organizing key components such as the introduction, literature review, and methodology (Mali, 2023). Mali's findings were further reinforced by Fitria, who noted that most students experience difficulty finding relevant reference sources (Fitria, 2022). The availability of reference sources is crucial for strengthening arguments in a thesis proposal. The inability to present ideas coherently and synthesize scholarly sources undermines the communicative function of the thesis proposal as an academically persuasive text. These findings are echoed by Pardede, who noted that poor paragraph development and a lack of logical flow frequently result in fragmented and underdeveloped arguments (Pardede, 2015). These issues not only compromise the clarity and cohesion of the text but also obscure the research intent and weaken the credibility of the writer's scholarly position.

These structural weaknesses are often symptoms of deeper deficits in critical academic literacy and reasoning. A useful lens for examining these argumentative limitations is Toulmin's (1958) model of argumentation, which posits that every effective argument comprises a claim, data (or grounds), and a warrant—supported, when necessary, by backing, rebuttals, and modal qualifiers (Toulmin, 2003; Toulmin et al., 1979). The failure to appropriately connect claims with valid grounds and warrants leads to reasoning errors that can be classified as logical fallacies. Suryatiningsih (2019) and Wang and Yang (2012) emphasized that students often lack the ability to establish a well-contextualized research background, identify meaningful research gaps, and employ scholarly references strategically—capabilities which are essential for building a logically sound and rhetorically effective argument. These limitations signal broader pedagogical challenges in equipping students with the tools to participate in disciplinary discourse communities.

Within this framework, Toulmin and his followers have classified logical fallacies into two overarching categories: fallacies of unwarranted assumption and fallacies of ambiguity (Toulmin et al., 1979). The first group encompasses fallacies such as hasty generalization, false cause, faulty analogy, and begging the question, which often stem from flawed inferential reasoning or insufficient support for general claims. These fallacies are frequently observed in postgraduate academic texts, where novice researchers may draw premature conclusions, rely on questionable authorities, or overlook necessary qualifications. The second category, fallacies of ambiguity, includes semantic and syntactic errors such as equivocation, amphiboly, and misleading accent, all of which can obscure argumentative clarity and lead to misinterpretation (Toulmin et al., 1979; Walton, 2020). The frequent presence of these fallacies in student writing not only reveals gaps in logical reasoning but also indicates the need for explicit instruction in both critical thinking and rhetorical precision.

Although the literature on logical fallacies is relatively rich, it has predominantly focused on non-academic genres such as political discourse, advertising, and popular media (Abbas et al., 2024; Wang, 2021). Srimayasandy (2021), for instance, analyzed televised testimonial discourse and identified the use of emotive and fallacious appeals such as appeal to pity and bandwagon fallacies. Likewise, Sri Istiningdias and Argenti (2019) documented the presence of argumentum ad populum and ignoratio elenchi in digital news content produced by CNN Indonesia. Santoso's (2017) study identified six

types of logical fallacies in the presidential debate between Hillary Clinton and Donald Trump. While these studies illustrate how fallacious reasoning can be deployed for persuasive effect, their relevance to formal academic writing—particularly within high-stakes genres like thesis proposals—is limited. Academic discourse imposes more stringent epistemic and rhetorical norms than those of public or commercial communication. As such, the transferability of insights from these studies to the academic context requires further empirical scrutiny (Rahardi, 2022).

Despite the centrality of sound reasoning to scholarly writing, relatively few studies have systematically examined how logical fallacies—especially those involving unwarranted assumptions—manifest within postgraduate thesis proposals. This gap is particularly notable given that thesis proposals serve as critical gateways to formal academic research and reflect the writer's readiness to engage with disciplinary knowledge production. The underrepresentation of fallacy analysis in academic writing research underscores the need for a more nuanced investigation into how argument quality is developed—or compromised—within the academic literacy practices of postgraduate students. By identifying the types and sources of fallacious reasoning in thesis proposals, the present study aims to contribute not only to rhetorical theory and argumentation studies, but also to pedagogical innovation in the teaching of academic writing at the graduate level.

III. RESEARCH METHODS

This study employs a qualitative research design supplemented by an intertextual analytical framework. The qualitative approach is utilized to systematically identify and categorize recurring patterns of unwarranted assumption fallacies within academic texts. Complementarily, the intertextual framework is applied to investigate the contextual and cognitive factors underpinning these fallacies, as perceived by the authors of the thesis proposals. The research corpus consists of thesis proposals submitted by postgraduate students in the Indonesian Language Education program at a private university. Data units comprise sentences containing argumentative claims, analyzed within their broader textual contexts, including preceding and subsequent discourse, to ensure comprehensive interpretation of the argumentation structure.

The methodology for data collection in this study comprises a combination of observational and interview techniques. Initially, a listening protocol supported by systematic reading and note-taking was employed to identify and categorize instances of unwarranted assumption fallacies within student thesis proposals (Sudaryanto, 2015). Complementing this, semi-structured interviews were conducted both in-person and virtually to explore the cognitive and contextual factors underlying these fallacies from the perspective of the thesis authors. During face-to-face interviews, data were collected through detailed note-taking and audio recordings to ensure accuracy and facilitate subsequent analysis. This triangulation of observational and interview data was implemented to enhance the reliability and validity of the findings.

The data analysis methodology employed in this study integrates an intertextual analytical framework with qualitative content analysis. This combined approach enables a rigorous examination of the interplay between textual components and their contextual environment, thereby allowing for a comprehensive identification and interpretation of the fundamental weaknesses that give rise to unwarranted assumption fallacies in students' thesis proposals. By systematically coding and categorizing patterns of fallacious reasoning, the methodology facilitates an in-depth understanding of how these fallacies manifest within the academic writing context (Krippendorff, 2004).

The methodology for data collection and analysis comprised the following sequential phases: (a) compiling argumentative texts sourced from relevant literature and student thesis proposals; (b) systematically identifying statements containing logical fallacies; (c) applying a coding scheme to label data according to the specific types of fallacies detected; (d) organizing the coded data into thematic categories corresponding to distinct fallacy types; and (e) conducting a comprehensive interpretative analysis by integrating intertextuality theory with qualitative content analysis to elucidate the nature and underlying causes of the identified fallacies.

IV. RESEARCH FINDINGS AND DISCUSSION

Unwarranted assumption fallacies constitute a prevalent category of logical errors in scientific argumentation, arising from premises that lack sufficient rational justification or empirical support. A notable example is false causality, wherein a causal connection is inferred between two events without adequate evidential basis, thereby compromising the argument's validity and persuasiveness. Similarly, hasty generalizations occur when broad conclusions are prematurely drawn from limited, unrepresentative, or irrelevant data. Arguments grounded on such flawed reasoning often result in misconceptions and undermine the coherence and intellectual rigor of academic texts. These fallacies not only mislead readers but also erode the epistemic foundation essential to scholarly discourse. Therefore, a rigorous and systematic examination of the various manifestations of unwarranted assumption fallacies is indispensable for constructing robust and credible arguments. The subsequent sections provide a detailed analysis of each fallacy type, revealing the underlying patterns of faulty reasoning.

1. Unwarranted Assumption Fallacies Caused by False Causality Derived from Logically Irrelevant Grounds

Within the fields of logic and argumentation analysis, unwarranted assumption fallacies constitute critical reasoning errors that significantly distort the establishment of legitimate causal relationships. A prominent instance is false causality, whereby an unwarranted causal connection is inferred between two events or variables lacking sufficient logical or empirical substantiation. This fallacy is often exacerbated by reliance on logically irrelevant premises, which, despite

their superficial rhetorical persuasiveness, undermine the argument's epistemic validity and coherence within a rigorous analytical framework.

This issue is also evident in the development of educational media aimed at enhancing children's language acquisition. Some claims assert that multimodality-based picture storybooks inherently and directly facilitate improvements in children's language skills, often without adequately accounting for the multifactorial influences on holistic language development. While multimodal approaches provide diverse communicative channels with the potential to stimulate language growth, empirical evidence highlights a notable discrepancy between theoretical advantages and practical application. The scarcity of learning materials that effectively integrate multimodality with educational games results in insufficient stimulation tailored to children's varied learning preferences—whether visual, kinesthetic, or sensory. This limitation hinders the acquisition of vocabulary, narrative competence, and interactive communication skills. Consequently, attributing language development solely to the use of multimodal picture storybooks, without considering these contextual constraints, constitutes a false causality fallacy based on logically irrelevant premises. This fallacy is further compounded when arguments overlook the complexity of individual learner needs, as children with distinct learning modalities require differentiated support that no single multimodal medium can fully address. For instance, kinesthetic learners benefit from physical and sensory experiences that picture books alone cannot provide. Thus, assuming that a single instructional medium, such as multimodal picture storybooks, serves as the primary determinant of children's language development reflects an erroneous cause-and-effect attribution. This misattribution is exacerbated when claims rest on anecdotal observations rather than comprehensive empirical investigation of other critical factors, including familial environment, social interactions, and individual learner characteristics.

Within scientific inquiry, this category of reasoning error is particularly detrimental, as it has the potential to misinform the direction of research and hinder the effective design of educational programs. When policymakers or researchers formulate conclusions based on unfounded causal assumptions, the implementation of educational initiatives may become misaligned with actual learner needs—resulting in suboptimal, or even counterproductive, outcomes. Consequently, it is imperative for scholars and practitioners in the field of education to adopt a more comprehensive causal analysis framework—one that accounts for relevant contextual variables and is grounded in empirically validated evidence. By adhering to such methodological rigor, the arguments advanced are not only logically sound but also pedagogically meaningful and practically applicable within the broader context of child development and learning.

Unwarranted assumption fallacies—particularly those involving false causality and grounded in logically irrelevant premises—represent not only structural deficiencies in argumentative reasoning but also pose serious epistemological and practical risks in the context of educational media development and early language stimulation. Such fallacies may lead to misguided interpretations, ineffective pedagogical interventions, and a distortion of research-based decision-making (Cusick & Peter, 2015; Toulmin et al., 1979). Addressing these reasoning errors through critical analysis is therefore essential for preserving the integrity of academic discourse and enhancing the quality, credibility, and applicability of research outcomes in educational settings. To provide a clearer and more accurate understanding of the interrelationships among the variables under investigation, Table 1 presents relevant empirical data that illustrate the core issues discussed in this study.

TABLE 1
FALSE CAUSES AS UNWARRANTED ASSUMPTION FALLACIES

Data 1: FNSDP	
Media pembelajaran yang mengintegrasikan pendekatan multimodalitas dan permainan edukatif masih terbatas. Keterbatasan ini menghambat perkembangan bahasa anak secara menyeluruh dan inklusif. Anak dengan gaya belajar berbeda memerlukan dukungan visual, kinestetik, atau sensorik khusus. Namun, banyak anak tidak mendapat stimulasi sesuai kebutuhannya. Kondisi ini menyebabkan kesenjangan kemampuan bahasa. Anak mengalami hambatan dalam kosakata, bercerita, dan komunikasi dua arah. [The availability of learning media that integrate multimodal approaches and educational games remains limited. This scarcity impedes the comprehensive and inclusive development of children's language skills. Given that children exhibit diverse learning styles, including visual, kinesthetic, and sensory preferences, they require tailored support to optimize their language acquisition. However, many children lack access to the necessary stimulation, resulting in a widening gap in language competencies. Consequently, children often encounter difficulties in vocabulary acquisition, narrative construction, and interactive communication.]	
Causal Factors:	
a.	The author does not provide robust empirical evidence substantiating that the constraints of learning media integrating multimodal strategies and educational games adversely affect children's comprehensive language development, including vocabulary acquisition, storytelling proficiency, and interactive communication skills.
b.	The data presented are largely subjective and overly generalized, lacking sufficient empirical rigor.
c.	The author fails to articulate clear logical warrants that rigorously link the proposed causes to their respective effects, thereby undermining the argument's causal validity.

2. Unwarranted Assumption Fallacies Arising from Hasty Generalizations Caused by Logically Irrelevant and Insufficient Evidence

Unwarranted assumption fallacies—particularly those rooted in hasty generalizations—represent a critical lapse in reasoning, occurring when conclusions are drawn from limited, non-representative, or logically irrelevant evidence. Such fallacies frequently result in overgeneralized or overly simplistic claims that fail to meet the standards of academic rigor. In both scholarly discourse and practical applications, these errors can compromise the validity of findings and lead to misinformed judgments or interventions.

This pattern of flawed reasoning is also observable in interdisciplinary studies exploring the role of art as a medium of communication and social regulation. In socio-political contexts such as agrarian resistance movements, for example, music often serves as a powerful expressive tool (Setyaningsih & Rahardi, 2019). Certain musicians intentionally engage with themes that lie outside the commercial mainstream—particularly those related to social critique, justice, and moral consciousness. Through lyrical content, artists not only establish dialogic engagement with their audiences but also employ music as a vehicle for social influence. In this way, songs function as symbolic interventions—shaping public discourse, challenging dominant narratives, and at times, contributing to shifts in collective perception and behavior.

Claims regarding the effectiveness of music as a medium of social control, when derived from a narrow set of musical texts or a limited number of artists without the support of robust and comprehensive empirical evidence, risk committing a hasty generalization. This fallacy occurs when conclusions are drawn from evidence that is either insufficient in scope or logically disconnected from the claim being made. For example, asserting that all socially critical songs exert significant influence on public attitudes—based solely on the analysis of a few selected lyrics—without considering mediating factors such as the socio-political context, audience demographics, or variability in individual reception, reflects a clear instance of unwarranted assumptions grounded in overgeneralization.

Furthermore, generalizations derived from irrelevant or contextually inadequate data may also lead to serious misinterpretations. In domains such as educational media and social communication, evaluating the persuasive function of music exclusively through lyrical content—while neglecting crucial factors such as the medium of dissemination, frequency of audience exposure, and the cultural or ideological positioning of listeners—can undermine the validity of the conclusions drawn. When such claims are constructed upon data that lack both representativeness and contextual alignment, they not only exemplify false cause reasoning but also risk perpetuating misleading assumptions. These fallacies weaken the epistemic foundation of academic arguments and compromise the applicability of research findings in real-world educational and communicative settings (Rahardi, 2023; Walton, 1999).

A rigorous and critical approach to evaluating evidence and data collection procedures is essential to prevent fallacious reasoning, particularly hasty generalizations. This involves careful validation of data credibility, assessment of sample representativeness, and a thorough examination of the relevance and sufficiency of evidence in relation to the claims being made. Such methodological vigilance is fundamental to constructing well-founded generalizations and ensuring the logical coherence of academic arguments (Setyaningsih & Rahardi, 2020a; Toulmin et al., 1979). By minimizing the risk of unwarranted assumption fallacies rooted in inadequate or irrelevant evidence, researchers contribute to the robustness, reliability, and overall integrity of scholarly discourse by emphasizing the presence of three key elements of argument (Hitchcock, 2017; Toulmin, 2003).

Taken as a whole, this phenomenon highlights the critical importance of employing a methodologically rigorous and analytically reflective approach when investigating the communicative functions of media—such as music and other educational platforms. Only through systematic and evidence-based inquiry can researchers formulate claims that accurately reflect complex social realities and avoid reasoning fallacies that undermine both theoretical coherence and practical relevance. To support a more nuanced understanding of this issue, Table 2 presents empirical data and interpretive analysis concerning the specific forms of erroneous assumptions that emerge from hasty generalizations rooted in inadequate and contextually irrelevant evidence.

TABLE 2
HASTY GENERALIZATIONS CAUSED BY LOGICALLY IRRELEVANT AND INSUFFICIENT EVIDENCE AS UNWARRANTED ASSUMPTION FALLACIES

Data 2: KRSDP <i>Beberapa musisi mengangkat tema yang jarang diusung pasar. Misalnya, tema kritik sosial dan pesan moral. Musisi kerap menjadikan sebuah lagu sebagai alat kontrol sosial yang ada di masyarakat, dalam hal tersebut musisi menggunakan lagu sebagai media untuk berkomunikasi (Rusmanto, 2016). Melalui lirik lagu, musisi dapat berkomunikasi dengan pembaca atau pendengar baik secara langsung maupun tidak langsung. Setiap penulis atau penyair lagu pasti memiliki kekhasan dalam hal pembuatan lagunya. Melalui lirik lagu yang diciptakan, seseorang dapat melakukan kontrol sosial yang dapat menimbulkan keyakinan bahkan perubahan tingkah laku atau sikap bagi pendengar atau pembacanya (Destiyani, 2016).</i> [Certain musicians engage with themes that are underrepresented in mainstream markets, including social critique and moral discourse. Music functions not only as an artistic expression but also as an instrument of social control and communication within society (Rusmanto, 2016). Through their lyrics, musicians communicate with audiences in both explicit and implicit ways. Each songwriter or poet employs a distinct stylistic approach, allowing them to exercise social influence by shaping listeners' or readers' attitudes and behaviors. This lyrical agency can inspire empowerment and effect behavioral or attitudinal change among audiences (Destiyani, 2016).]	
Causal Factors: - The author demonstrates a lack of understanding regarding the requirement to support claims with relevant and adequate empirical evidence. - The evidence provided is insufficient and fails to substantiate the claim that “some musicians address themes rarely explored by the market,” lacking specific examples or data to validate this assertion. - The argumentation lacks a coherent and logically structured framework, resulting in weakened argumentative rigor and reduced overall persuasiveness.	

3. Unwarranted Assumption Fallacies Arising from Hasty Generalizations because of Premature Claim

Fallacies of reasoning, specifically those involving unwarranted assumptions, often emerge from hasty generalizations premised on premature conclusions. These conclusions are drawn in the absence of comprehensive and methodical data collection and analysis, thereby neglecting the multifaceted nature of relevant variables and contextual factors inherent to

the study. As a result, such conclusions are fundamentally flawed, undermining their validity and potentially leading to the misguidance of readers and stakeholders who rely on the research outcomes (Toulmin et al., 1979).

The issue of premature generalizations is clearly illustrated in studies examining the role of local authors within the framework of Indonesian literary history. National literary historiography often prioritizes works produced at the national level, resulting in the marginalization or omission of local writers in dominant narratives (Rusmanto, 2016). In contrast, local literary productions—such as those by Yogyakarta-based authors including Abdul Wachid B.S., Kiswando, Ngarto Februana, Angger Jati Wijaya, and Agus Noor—represent authentic articulations of their unique worldviews. These texts embody the socio-cultural dynamics, lived experiences, and educational contexts that shape the authors' intellectual frameworks, thereby making valuable contributions to the broader literary landscape.

Nonetheless, studies or narratives that limit their scope to nationally recognized works, without adequately considering the richness and diversity of local literature, risk promulgating unwarranted and premature generalizations. The assertion that local authors have made minimal contributions is therefore not only empirically unfounded but also overlooks the multiplicity of socio-cultural contexts that inform local literary production. This represents a clear example of hasty generalization, whereby conclusions are drawn without comprehensive, representative, and critical analysis of the relevant data. Such methodological shortcomings reflect a lack of rigorous empirical scrutiny and critical reflection (Hasibuan et al., 2020; Lismay, 2020).

Premature claims within this context pose significant challenges to the advancement of literary studies and the preservation of local cultural heritage. Uncritical acceptance of such claims, without thorough empirical validation, risks perpetuating historical and cultural misrepresentations that obscure the vital contributions of local authors who merit scholarly attention. This oversight can result in detrimental academic and socio-cultural consequences, including the narrowing of cultural perspectives and constraints on literary pedagogy (Setyaningsih & Rahardi, 2020a; Suminto & Ena, 2020).

To mitigate these risks, research must adhere to rigorous methodological standards, encompassing systematic and representative data collection from diverse sources, comprehensive contextual analysis, and robust triangulation and validation procedures. Researchers should exercise caution when articulating claims, explicitly acknowledging study limitations and avoiding overgeneralizations until supported by substantial empirical evidence. This methodological rigor is essential to minimizing premature conclusions and enhancing the validity, reliability, and scholarly impact of research findings.

For further elucidation, readers are directed to Table 3, which delineates illustrative examples and detailed analyses of unwarranted assumption fallacies arising from premature claims. This synthesis offers critical insights into the mechanisms and ramifications of such fallacies within the fields of social sciences and humanities.

TABLE 3
HASTY GENERALIZATIONS OF PREMATURE CLAIM AS UNWARRANTED ASSUMPTION FALLACIES

Data 3: MRSDP <i>Karya sastra baik lokal maupun nasional telah mewakili suara pengarang yang merefleksikan pandangannya terhadap dunia melalui pola pikir yang dipengaruhi proses pendidikan, pengalaman, dan sosial budaya pengarang. Maka, karya-karyanya merupakan manifestasi sosial budaya kehidupan pengarang terhadap dunia. Sastrawan lokal Yogyakarta, misalnya, aktif menulis di surat kabar Kedaulatan Rakyat, Bernas, dan Yogya Pos, bahkan ada beberapa yang telah berhasil membukukannya, baik dalam bentuk kumpulan puisi ataupun kumpulan cerpen, seperti Abdul Wachid B.S., Kiswando dan Ngarto Februana, Angger Jati Wijaya, dan Agus Noor (Supriyadi, 2000).</i> [Literary works at both local and national levels reflect the authors' worldview, which is shaped by their cognitive frameworks influenced by education, personal experiences, and socio-cultural backgrounds. Thus, these works represent a manifestation of the authors' socio-cultural realities and their interpretations of the world around them. For example, writers from Yogyakarta have actively contributed to newspapers such as <i>Kedaulatan Rakyat</i>, <i>Bernas</i>, and <i>Yogya Pos</i>. Moreover, some of these writers have successfully published their works in book form, including poetry collections and short story anthologies. Prominent figures among them include Abdul Wachid B.S., Kiswando, Ngarto Februana, Angger Jati Wijaya, and Agus Noor (Supriyadi, 2000).]	
Causal Factors: - The author prematurely advanced the assertion that "literary works, both local and national, represent the author's voice and reflect their worldview" without providing sufficient empirical support to substantiate this claim. - There is a fundamental misunderstanding of the claim's scope, which requires comprehensive and comparative data encompassing both local and national literary outputs to convincingly demonstrate their role in reflecting authors' perspectives. - The evidence presented is narrowly drawn from a limited selection of literary works published exclusively in Yogyakarta, thus failing to capture the diversity and representativeness necessary to underpin a robust and logically coherent argument.	

4. Unwarranted Assumption Fallacies Arising from Hasty Generalizations because of Immature Conclusion

Fallacies stemming from unwarranted assumptions, particularly those resulting from hasty generalizations, frequently arise from premature conclusions drawn in the absence of comprehensive data analysis. These conclusions often neglect the complexity of pertinent variables and alternative interpretations, lacking the necessary critical scrutiny (Toulmin et al., 1979; Walton, 2013). As a result, they undermine scientific rigor and risk misleading readers and stakeholders who depend on the findings.

This phenomenon is especially pertinent within argumentation studies, notably concerning commitment-based arguments in mass media discourse. An empirical investigation into editorials published in *Bisnis Indonesia* revealed a

pervasive deficiency in the effective construction of commitment-based arguments. Analysis of ten editorials indicated that eight contained significant inconsistencies in their argumentative structure (Rusmanto, 2016; Setyaningsih & Rahardi, 2020b). These inconsistencies largely stemmed from editorial staff's insufficient grasp of Douglas Walton's theoretical framework on commitment-based argumentation. Consequently, authors adopted disparate and unsystematic approaches, lacking standardized methodological guidelines, which led to fragmented and logically tenuous arguments.

This scenario exemplifies the ramifications of premature conclusions leading to unwarranted assumption fallacies. When writers and editorial teams evaluate the quality and efficacy of arguments without a robust theoretical grounding and thorough analytical rigor, they commit hasty generalizations that compromise the credibility and scholarly integrity of their work. Such argumentative weaknesses not only diminish reader confidence but also impair the editorial's fundamental role as a reasoned and persuasive vehicle for influencing public discourse.

More broadly, premature conclusions frequently stem from limited conceptual understanding and inadequate methodological rigor in the argumentation process. In the context of *Bisnis Indonesia* editorials, this underscores the necessity for a more systematic framework for writer development and editorial oversight, encompassing comprehensive training in commitment-based argumentation theory alongside the adoption of standardized evaluative criteria. Such measures would not only enhance the distinctiveness and substantive quality of editorials but also foster greater reader trust through consistent and rigorous analytical practices.

Moreover, immature conclusions can be substantially mitigated through continuous quality assurance mechanisms, including internal peer review, collaborative critical discourse among authors, and the application of structured analytical frameworks to assess the validity and coherence of arguments. This iterative process of reflection and revision is essential to cultivate more nuanced and academically robust conclusions.

This study highlights that advancing the consistency and depth of editorial arguments involves more than refining writing skills; it requires cultivating a comprehensive understanding of both theoretical foundations and methodological approaches. Therefore, building editorial capacity is a strategic imperative to prevent fallacious reasoning arising from premature or underdeveloped conclusions, thereby enhancing editorial quality and reinforcing its critical role as a vehicle of rational public communication (Ketokivi & Mantere, 2021; Samosa, 2021; Walton, 2013).

For a more detailed insight, readers are encouraged to refer to Table 4, which presents a thorough analysis of commitment-based argument inconsistencies in *Bisnis Indonesia* editorials, along with representative case studies and their broader implications for public trust.

TABLE 4
HASTY GENERALIZATIONS CAUSED BY IMMATURE CONCLUSION AS UNWARRANTED ASSUMPTION FALLACIES

Data 4: PLSDP <i>Kemampuan menulis argumen berbasis komitmen manajemen redaksi Bisnis Indonesia saat ini masih tergolong rendah. Berdasarkan observasi yang dilakukan, peneliti menemukan fakta bahwa penulisan editorial Bisnis Indonesia belum memiliki satu bentuk argumen yang menjadi kekhasan Bisnis Indonesia. Setiap penulis memiliki gaya sendiri dalam menulis editorial dengan berpedoman pada pemahaman mengenai argumen yang berbeda-beda. Peneliti juga melakukan pencermatan terhadap 10 teks editorial kemudian membedah dan menganalisis editorial tersebut. Berdasarkan studi pendahuluan terhadap editorial Bisnis Indonesia, peneliti menemukan 8 teks editorial dengan argumen berbasis komitmen yang belum konsisten. Beberapa kendala yang mungkin menjadi faktor penyebab adalah kurangnya pemahaman yang mendalam dalam manajemen redaksi mengenai argumen dan argumen berbasis komitmen menurut perspektif Douglas Walton. [The ability to construct commitment-based arguments within Bisnis Indonesia's editorial management remains relatively underdeveloped. Observations indicate that the editorials lack a distinctive argumentative style unique to Bisnis Indonesia, as each writer employs individual approaches influenced by differing conceptions of argumentation. In this study, ten editorials were selected for qualitative analysis and dissection. Preliminary results reveal inconsistencies in the use of commitment-based arguments across eight of the editorials examined. Contributing factors include a limited understanding among editorial staff regarding the theoretical foundations of arguments, particularly commitment-based arguments as defined by Douglas Walton.]</i>	
Causal Factors: - The author hastily concluded that the editorial team of <i>Bisnis Indonesia</i> exhibits a relatively low proficiency in constructing commitment-based arguments, without robust empirical substantiation. - The assessment relied on a limited corpus of ten editorial texts, identifying inconsistencies in eight, which raises concerns about the representativeness and generalizability of the findings. - The argument lacks explicit warrants that rigorously establish a logical and evidential connection between the claim and the presented data, thereby compromising the overall validity and persuasiveness of the conclusion.	

5. Unwarranted Assumption Fallacies Arising from Hasty Generalizations because of Irrelevant Evidences

One prevalent logical fallacy encountered in argumentation is the unwarranted assumption fallacy, frequently stemming from hasty generalizations founded on irrelevant or inadequate evidence. Irrelevant evidence pertains to information that lacks a direct and logical connection to the claim or argument being posited. The reliance on such evidence can obscure the argument's core rationale, diminish the robustness of its conclusions, and potentially mislead both academic audiences and practitioners who depend on these findings for informed decision-making (Toulmin et al., 1979; Walton, 1999, 2013).

This issue is especially critical in the educational domain, particularly in the design and evaluation of instructional models aimed at enhancing writing skills. Each learner possesses distinct cognitive profiles, creative capacities, and learning preferences that must be acknowledged to optimize pedagogical efficacy. Writing, especially within creative genres such as fantasy, is an intricate, generative process that demands systematic articulation of ideas, emotions, and

imaginative constructs in written form (Ahsin, 2019; Rahardi et al., 2023). Writing transcends mere information transmission; it functions as a dynamic communicative medium capable of persuasion, engagement, and meaningful expression. Therefore, empirical evidence used to evaluate the effectiveness of learning models must be directly pertinent to the learners' characteristics and the inherent complexities of the creative writing process. Employing generalized, overly technical, or contextually irrelevant data—without due consideration of learner diversity and the multifaceted nature of creative writing—renders conclusions susceptible to unwarranted assumption fallacies. Such methodological shortcomings undermine the validity of research outcomes and hinder the development of tailored, evidence-based pedagogical interventions that genuinely foster creative writing proficiency (Jin et al., 2022; Rahardi, 2020; Setyaningsih & Rahardi, 2020b).

A similar fallacious pattern emerges in sociocultural research, particularly in analyses of music as a vehicle for social critique. Music—especially through its lyrical dimension—functions not only as an aesthetic form but also as a discursive medium that conveys moral messages and social criticism, with the potential to influence public attitudes and behavior (Rusmanto, 2016; Destiyani, 2016; Rahardi et al., 2024). However, when analytical frameworks prioritize formal elements such as melody, harmony, or vocal technique while overlooking the sociocultural and ideological contexts from which the music emerges, the evidence deployed becomes misaligned with the argument's core claim. Specifically, attributing music's function as a tool of social control to aesthetic qualities alone constitutes a use of irrelevant evidence and weakens the explanatory power of the analysis. Such methodological oversight risks producing conclusions that are not only logically invalid but also epistemologically disconnected from the broader sociopolitical realities that shape both musical production and reception.

In academic discourse, particularly within the realm of scientific reasoning and argumentation, the relevance of evidence constitutes a foundational criterion for validating claims. The credibility of an argument depends not merely on the presence of data, but on the extent to which such evidence is conceptually aligned with the research question and logically supports the argument being advanced (Toulmin et al., 1979; van Eemeren et al., 2013; Walton, 1999, 2013). The misuse of irrelevant evidence—data that lacks direct theoretical or contextual linkage to the claim—can lead to unwarranted assumption fallacies, thereby compromising the integrity of the reasoning process. To mitigate such fallacies, scholars are expected to employ rigorous methodological procedures, including data triangulation and theoretical framing, which ensure analytical precision and enhance the validity of their conclusions (Samosa, 2021). Furthermore, the ability to critically evaluate the epistemological weight of each data source reflects a researcher's capacity for methodological reflexivity and scholarly rigor. When irrelevant or inadequately contextualized evidence is used, the resulting claims not only become logically unsound but may also mislead audiences, weaken scholarly contributions, and erode public trust in scientific inquiry. Therefore, cultivating the competence to select and integrate relevant, context-sensitive evidence is indispensable for producing coherent, credible, and impactful academic arguments across disciplines.

To further illustrate the impact and provide concrete examples of unwarranted assumption fallacies stemming from the use of irrelevant evidence, readers are encouraged to refer to Table 5 below. This table presents detailed case studies and examples that highlight how reliance on irrelevant evidence can diminish the robustness of arguments and weaken the validity of conclusions in sociocultural and educational research.

TABLE 5
HASTY GENERALIZATIONS CAUSED BY IRRELEVANT EVIDENCED AS UNWARRANTED ASSUMPTION FALLACIES

Data 5: RMSDP <i>Pemilihan model pembelajaran harus diperhatikan dengan baik mengingat setiap peserta didik memiliki karakter diri dan kemampuan belajar yang berbeda-beda dalam menulis khususnya cerita fantasi. Menulis dianggap sesuatu yang paling sulit dibandingkan dengan keterampilan berbahasa yang lainnya. Keterampilan menulis merupakan kegiatan produktif yang menitikberatkan seseorang untuk menuangkan ide, ekspresi, dan gagasannya dalam bentuk tulisan. Hal ini sesuai dengan pendapat Ahsin (2019) keterampilan menulis penting dilakukan karena melalui keterampilan menulis seseorang dapat menuangkan pikiran, ide, maupun perasaannya dalam bentuk tulisan. Menulis merupakan suatu kegiatan komunikasi berupa penyampaian pesan (informasi) secara tertulis kepada pihak lain dengan menggunakan bahasa tulis sebagai alat atau mediana. Menulis merupakan sebuah proses kreatif menunangkan gagasan dalam bentuk bahasa tulis dalam tujuan memberi tahu, meyakinkan, atau menghibur (Hayati Fitri & Supriatna, 2020).</i> [The selection of appropriate learning models requires careful consideration, as students exhibit diverse characteristics and varying levels of writing proficiency, especially in the context of composing fantasy narratives. Writing is widely regarded as the most challenging language skill compared to other modalities. It is a productive skill that demands the ability to articulate ideas, emotions, and thoughts coherently in written form. This view aligns with Ahsin (2019), who asserts that writing skills are essential for expressing cognitive and affective content through written communication. Writing functions as a communicative act that conveys messages or information to an audience via written language. Furthermore, writing is a creative process involving the generation and organization of ideas to inform, persuade, or entertain readers (Hayati Fitri & Supriatna, 2020).]	
Causal Factors:	
a.	The author does not provide sufficient empirical or theoretical evidence to support the claim that writing is the most challenging language skill compared to others. The evidence presented primarily elaborates on the intrinsic characteristics of writing, lacking a comparative analysis that justifies the claim.
b.	The author demonstrates a limited understanding of the conceptual basis of the claim, leading to unclear and unsupported statements.
c.	The author shows inadequate skills in developing a logically sound and well-substantiated argument, which weakens the overall credibility of the claim.

V. CONCLUSION

This study identifies five prevalent types of unwarranted assumption fallacies frequently encountered in scholarly argumentation: (a) false causality rooted in irrelevant logical connections, (b) hasty generalizations derived from inadequate and unrelated evidence, (c) premature claims lacking sufficient empirical validation, underdeveloped conclusions resulting from superficial analysis, and (d) reliance on irrelevant data as foundational support. These fallacies illustrate how improper data selection and insufficiently rigorous argumentation can yield misleading conclusions that undermine both the intellectual rigor and scientific credibility of academic work. However, the scope of this study is limited to a specific case within a narrowly defined discipline, restricting the broader applicability of its findings. Additionally, the predominantly descriptive nature of the data calls for further comprehensive investigations utilizing mixed-method approaches to generate more robust and generalizable insights. The implications of these findings are significant for the academic community and professional practitioners, emphasizing the necessity for systematic, rigorous, and empirically grounded approaches to argument evaluation. Moreover, the study advocates for enhanced critical reasoning training to equip scholars and professionals with the skills needed to identify, prevent, and remediate logical fallacies that may compromise the validity and reliability of scientific discourse. Overall, this research contributes meaningfully to strengthening the foundations of coherent and credible scientific argumentation and highlights avenues for future interdisciplinary research into the dynamics of logical fallacies within academic writing.

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EFL Writing Teacher Training and Practices in a Saudi University: A More Vivid Picture

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Abstract—Academic writing is of paramount importance in Higher education institutions, yet EFL (English as a Foreign Language) writing instructors receive inadequate preparation and support (Wang et al., 2020). The present study examined the adequacy and accessibility of professional training provided to writing teachers, alongside an investigation of their pedagogical practices in Saudi university classrooms. The research design collated survey data from 107 EFL writing instructors with follow-up interview data from 8 participants. The survey results showed a significant difference between teachers' perceptions of the importance of academic writing for university success (75.3% agreement) and their implementation of writing instruction, which focused on a product-based approach, with limited incorporation of process or genre-based approaches. The survey also revealed insufficient institutional support for writing-related professional development as a mere 20.6% of teachers received relevant training. The results further emphasized the urgent need for training more than half of the teachers in second language writing pedagogy, academic writing instruction, and feedback strategies. The findings highlighted a tension between pedagogical principles and classroom realities, as teachers often struggled to implement best practices due to heavy teaching loads, large class sizes, and limited curricular flexibility. The research demonstrated both the current challenges and teacher perspectives about existing support mechanisms. Thus, the study informed the current state of EFL writing instruction in Saudi Arabia to guide teacher education and curriculum development and institutional writing development initiatives.

Index Terms—teachers' beliefs, L2 writing, professional development, writing pedagogy

I. INTRODUCTION

A. Writing in EFL Contexts and the Need for Teacher Preparation

The acquisition of academic writing remains one of the most critical language skills, as many students have been reported to struggle with it in English as a Foreign Language (EFL) contexts (Hyland, 2003). The written language differs from spoken language since the focus shifts to linguistic structures, text coherence, audience needs, and writing intentions (Hyland, 2022). The facilitation of English as a foreign language is considerably complex, attributable to a lack of consistent written English exposure among students outside classrooms. This is further fueled by time-limited exam systems faced by the educators that stress accuracy over creative writing and student engagement.

Teaching writing effectively in these contexts necessitates beyond subject matter expertise among educators, i.e., specialized pedagogical training to guide student learning through strategic models combined with effective strategies to offer feedback and genre exploration. Writing process approaches recognize that drafting followed by revising, combined with peer interaction, creates a developmental writing sequence (Badger & White, 2000). Genre-based instruction enables students to grasp both the social objectives and structural elements of various text categories (Hyland, 2003; Swales, 1990). Research demonstrates that several effective writing instruction methods are not frequently implemented in EFL classrooms owing to teachers' preference for conventional methods based on model text imitation and grammatical error correction (Al-Nafjan & Alhawsawi, 2022).

The lack of readiness of writing instructors remains the prominent cause for this learning gap. Hyland (2022) stated that some pre-service education programs for teachers in EFL settings failed to impart the knowledge of teaching writing as an independent language skill. Teachers have been reported to often struggle in creating writing assignments and assessing student work, followed by providing constructive feedback (Alkodimi & Al-Ahdal, 2021). The absence of formal training opportunities in writing pedagogy leads instructors to rely on instinctive or traditional teaching methods, thereby resulting in a mismatch with the demands of modern research findings about language learning and academic literacy.

The process of writing encompasses structuring linguistic elements together with cognitive processes and socio-cultural practices. Academic writing demands specialized knowledge of disciplinary conventions owing to its specific contextual requirements (Hyland, 2022). Students are required to frame grammatically correct sentences, organize their arguments, synthesize sufficient evidence, followed by citing their sources. University academic discourse requirements are relatively more challenging for EFL learners as they face three main barriers, including background knowledge deficits, limited exposure to target language texts, and restricted access to required academic discussions (Lillis & Scott,

2007). Teaching professionals must function as essential connectors between these two domains, but their ability to do so largely depends on the focus and quality of their professional development.

B. The Role of Writing in Saudi Higher Education

Saudi Arabia has elevated the status of English to an educational and scientific, and commercial language to support the Saudi Vision 2030 reform initiative. English serves as the main subject for university students since it is the medium of instruction among all the grades in public schools and for STEM subjects at the higher education (Elyas & Picard, 2018). Students require English language proficiency, including academic writing skills, as these have become foundational for academic achievements and career progression (Barnawi & Al-Hawsawi, 2017).

The latest findings on English writing education in Saudi Arabia's higher education institutions reveal the continued challenges (Al-Nafjan & Alhawsawi, 2022). One of the major challenges for scarce opportunities for student feedback and teacher-student conferences includes large classrooms with brief instructional periods (Aloairdhi & Alhojailan, 2024). Typically, in the Saudi context, the writing curriculum at educational institutions focuses on five-paragraph essay writing and grammar exercises, yet avoids teaching academic genres alongside digital skills and subject-based writing assignments (Mahboob & Elyas, 2014). The educational methods used today may prevent students from developing writing abilities that match real-world academic or workplace requirements.

The writing pedagogy training remains underrepresented in pre-service and in-service teacher training programs across Saudi Arabia (Aloairdhi & Alhojailan, 2024). English teacher preparation institutions in Saudi Arabia focus on TESOL methods, literature, and linguistics with little focus on writing-specific instruction (Alkodimi & Al-Ahdal, 2021). University writing instructors may often begin teaching without proper training about the writing process and formative assessment rubrics. In the Saudi context, writing instruction at several institutions lacks proper institutional support (Alamri, 2021). Although few educational institutions have writing centers, these centers are used minimally due to a lack of sufficient teaching assistants and resources, and time to support their students. Assessment policies have not been found to emphasize process-based teaching approaches, which results in instructors emphasizing grammatical accuracy and basic sentence coherence instead of focusing on conceptual development and editing (Al-Nafjan & Alhawsawi, 2022). Limitations in teaching ability may severely impede instructional efficiency while simultaneously increasing teacher stress and leading to burnout.

C. The Importance of Studying Teacher Beliefs and Practices

The complete understanding of writing education requires a thorough analysis of both syllabi and textbooks and teachers' fundamental beliefs, which direct their instructional decisions (Borg, 2015). Teachers usually function outside isolation as their classroom methods are likely to develop from multiple elements, including their educational background, institutional requirements, their personal teaching history, and their understanding of student capabilities, to name a few. Several studies have shown that well-informed teachers fail to implement new practices because they lack sufficient time, support, and confidence (Farrell & Ives, 2015).

Currently, the Saudi educational environment lacks sufficient empirical research about writing teacher perceptions and practices at universities (Al-Nafjan & Alhawsawi, 2022; Aloairdhi & Alhojailan, 2024). The existing literature focuses mainly on issues surrounding student writing and curriculum transformation alongside general language teaching obstacles. However, there is a severe dearth in information related to the current understanding of writing instructors' views on writing importance, their choice of instructional methods, institutional support, and professional development requirements.

The national drive for educational reform alongside academic excellence demands a thorough analysis of writing instruction by educators at Saudi universities. This research will both reveal current teaching practices and create foundations for developing enhanced and tailored training programs, curricular changes, and institutional policies that strengthen academic writing performance. This research addresses the need to conduct a thorough evaluation of writing teacher preparation and practice at a Saudi university. The study investigated four central questions through a mixed-methods sequential explanatory design:

1. What do writing teachers believe about the importance of writing in their programs and classes?
2. What writing practices do teachers engage in?
3. What support do teachers receive for teaching and learning writing?
4. What are writing teachers' training needs?

The study combined quantitative survey data with qualitative interview findings to achieve both an extensive and detailed understanding. It also includes direct statements from frontline instructors who teach writing to students but encounter multiple responsibilities, ambiguous standards, and insufficient training opportunities. The present research adds value to writing teacher education literature attributable to its focus on under-examined educational settings. The study fills an essential knowledge gap regarding teaching and supporting writing in Saudi higher education institutions. It further provides useful recommendations for educational policymakers, curriculum developers, and teacher training specialists who want to enhance writing education and develop teacher readiness for complex language instruction.

II. LITERATURE REVIEW

This section examines the main topics related to EFL writing instruction for teachers through a focus on university teaching in Saudi Arabia. The review examined teachers' beliefs about writing while exploring instructional practices, institutional support, and training needs.

A. Teachers' Beliefs About Writing

The fundamental role of teachers' beliefs in shaping classroom practice arises from their personal understandings, assumptions, and instructional judgments (Borg, 2015). The beliefs held by educators about writing instruction determine the types of writing content taught, writing formats, and feedback approaches used in their classrooms. The EFL research demonstrates that majority of teachers perceive writing as vital for academic success, yet they frequently face institutional structural barriers that create teaching conflicts (Farrell & Ives, 2015; Lee, 2013).

So far, the recognition of writing as a fundamental English component has not translated into visible developments in Saudi Arabia's curriculum design or classroom teaching practices (Alkodimi & Al-Ahdal, 2021). The marginalization of writing in official guidelines urges teachers to adopt traditional teaching approaches that emphasize grammar and structure above all else. The institution's conflicting priorities between teaching content and test preparation threaten to diminish teachers' positive beliefs on writing instruction (Elyas & Picard, 2018).

B. Instructional Practices in Writing Classrooms

Different EFL contexts implement diverse writing instructions based on curriculum standards, along with institutional capabilities and teachers' teaching abilities. The product approach has traditionally controlled EFL writing instruction because it emphasizes students reproducing models through correct form and structure (Aloairdhi & Alhojailan, 2024; Badger & White, 2000). The teaching method follows the format of traditional examination-based education since it places emphasis primarily on accurate responses and strict adherence to structure. The process approach to writing, on the other hand, teaches students to view the process of writing as an ongoing development that includes brainstorming, followed by drafting and then revising and peer feedback (Hyland, 2003). Genre-based instruction advises students about text functions in particular academic or professional environments (Martin & Rose, 2008). The literature supports the effectiveness of process and genre approaches, but their implementation remains restricted in EFL contexts.

EFL teachers implement controlled composition, translation tasks, and fill-in-the-blank exercises because these strategies aid students practice writing while reducing their exposure to genuine writing activities (Hyland, 2003). Teachers' feedback mainly concentrates on grammatical errors rather than addressing organizational structure or content development, or audience understanding (Lee, 2013). Certain instructors in the field of TESOL have recently been found trying to use more progressive teaching methods. Educational methods evolve through this practice, even though their practical implementation remains inconsistent.

Digital writing tools like online collaborative platforms, together with automated feedback systems and corpus tools, remain underutilized in EFL writing instruction (Li, 2023). These tools could remarkably improve student participation while supporting individualized learning (Alkodimi & Al-Ahdal, 2021). The adoption of these tools depends heavily on both institutional technology support and teaching staff abilities in technology-enhanced education.

C. Institutional Support for Writing Instruction

Writing instruction operates within complete institutional frameworks that shape either positive or restrictive teaching environments (Alshammari, 2020). Educational institutions function through administrative policies, curriculum frameworks, and resource availability, which further determine workload distribution, the establishment of writing centers and teaching assistants, and professional development programs.

For instance, the significant numbers of students enrolled in EFL writing courses provide evidence for the challenges that surround difficulties in teaching writing. The management of drafts, along with individual revision support and meaningful feedback delivery, is tedious for teachers who handle writing classes with a class size exceeding 30 students (Richards & Farrell, 2005). The large student-teacher ratios in Saudi writing classes prevent educators from implementing conference sessions and portfolio assessment methods (Al-Hoorie et al., 2021; Alkodimi & Al-Ahdal, 2021).

Time constraints also present a significant problem for all institutions. often forces them to adopt surface-level, exam-oriented, or product-based writing practices, prioritizing grammar drills, sentence correction, and rigid essay templates over process writing, genre exploration, or critical engagement. As a result, writing instruction becomes highly compressed, leaving little room for drafting, peer feedback, or individualized scaffolding (Alkodimi & Al-Ahdal, 2021). Surface-level teaching is reported to be a common occurrence while teachers prevent students from working on time-consuming revision or collaborative writing tasks. Teaching staff must create their own materials and assessments because EFL writing curricula, together with institutional writing guidelines, remain absent (Alkodimi & Al-Ahdal, 2021).

The support structure depends heavily on professional development opportunities for staff members. Research shows that writing-specific professional development opportunities remain uncommon in numerous EFL universities because

they occur infrequently or do not exist. The lack of writing pedagogy, feedback strategies, and assessment practices training prevents teachers from delivering writing instruction to their students (Wang et al., 2020).

The lack of writing centers and academic support services makes the educational situation worse. The North American educational system places writing centers at the center of student support through tutoring services and writing resources, as well as workshops. Many Saudi universities operate without writing centers and minimal writing support services, so the entire burden of teaching falls on classroom instructors.

The institutional perspective, which treats writing as a supplementary soft skill instead of a fundamental academic subject, leads to reduced importance placed on writing instruction compared to grammar, reading, or content education. The devaluation of writing instruction leads to insufficient funding and unrecognized writing teachers' work as well as weak integration of writing throughout the curriculum (Al-Nafjan & Alhawsawi, 2022; Aloairdhi & Alhojailan, 2024; Elyas & Picard, 2018; Mahboob & Elyas, 2014).

D. Writing Teachers' Professional Training Needs

The effectiveness of writing instruction depends heavily on the quality of preparation received by teachers. Teachers need specialized language knowledge about both linguistic structures and academic and social writing contexts, as well as expertise in designing tasks and writing assessment methods and strategies for supporting struggling writers (Aloairdhi & Alhojailan, 2024). The majority of EFL contexts lack teacher education programs that focus on writing pedagogy.

General TESOL methodology receives most attention in pre-service education programs, but writing instruction receives insufficient differentiation from reading, listening, and speaking instruction. The educational system does not teach new teachers how to deliver explicit writing instructions during their teacher training programs. The available in-service training programs are either generic or too brief or fail to connect with real classroom situations faced by teachers (Borg, 2015). According to Almuwakkil and Alshakhi (2022), teachers demand practical training that includes rubric development and academic writing scaffolding, and peer review techniques.

Professional development programs that focus on writing instruction show increasing demand throughout Saudi Arabia. Alharbi and Albelihi (2023) showed that Saudi university EFL instructors actively pursue academic writing workshops and short courses about feedback and EAP/ESP writing. The study revealed that instructors face challenges because they lack suitable and meaningful training opportunities.

The training programs for teachers lack essential information about second language writing research. The teaching staff remains unaware about current writing instruction methods which include corpus-based tools, rhetorical genre theory, and multilingual writing perspectives. According to Richards and Farrell (2005), professional learning communities, reflective teaching journals, and collaborative action research have been proposed as sustainable teacher development models.

Saudi Arabia has yet to develop Writing Across the Curriculum (WAC) and English for Specific Purposes (ESP) programs which integrate writing instruction into disciplinary education (Alharbi & Albelihi, 2023). Teachers responsible for preparing students for academic writing in STEM fields or professional communication lack sufficient knowledge about content and genre awareness to deliver effective instruction.

The literature shows that writing instruction in EFL contexts is shaped by multiple factors which include teacher beliefs, pedagogical practices, institutional support, and professional development. Writing instruction remains challenging for teachers because they face training deficiencies, large classes, restrictive curricula, and insufficient institutional support. The Saudi educational system faces three main challenges which include limited writing-specific professional development, writing centers absence, and a focus on grammar-based teaching methods. A solution to these issues demands joint efforts between educational institutions to redesign teacher education programs and provide context-relevant professional development and establish writing as a fundamental academic literacy and university education core subject. The current study uses these findings as a basis to study writing instructors' beliefs and practices at a Saudi university while identifying their professional needs. The research aims to direct future teacher education initiatives while developing more effective EFL writing pedagogy for higher education institutions.

III. METHODS

A. Research Design

The research design of this study employed a mixed-methods approach using a sequential explanatory design (Creswell & Plano Clark, 2018). The research was initiated with a quantitative phase, which collected data through a structured questionnaire distributed to university-level writing teachers. The survey participants underwent semi-structured interviews in the subsequent qualitative phase. This research design enabled researchers to understand writing teachers' beliefs, their practices, institutional support, and professional development needs at a broader level before conducting in-depth examinations of these patterns.

B. Participants

The quantitative study involved 107 university writing instructors from the First Year Program and other programs at a major Saudi university that serves more than 50,000 students. The research data contains participant demographic

information, which appears in Table 1. The university employs 500 English language instructors and faculty members from diverse nationalities who teach in the First Year Program and other programs that teach English language courses. The study used purposive sampling to choose participants who teach academic writing at the tertiary level. The qualitative phase included semi-structured interviews with 8 teachers who came from the same participant pool and demonstrated different teaching experiences, educational backgrounds, and institutional roles, as indicated in Table 2.

TABLE 1
DEMOGRAPHIC INFORMATION FOR THE PARTICIPANTS

Demographic Information		Frequency	Percentage
Gender	Male	43	41.3
	Female	61	58.7
Academic rank	Teaching assistant	4	3.8
	Lecturer/language instructor	44	42.3
	Assistant professor	38	36.5
	Associate professor	16	15.4
	Professor	2	1.9
Age in years	< 30	0	0
	30–40	37	35.6
	41–50	42	40.4
	> 50	25	24.0
Highest Earned Degree	Bachelor	4	3.8
	Master	60	57.7
	Doctorate	40	38.5
Discipline	English Language Institute	44	42.3
	Faculty of Applied Studies	10	9.61
	Faculty of Sciences	9	8.65
	Faculty of (Applied) Medicine	8	7.96
	Faculty of Arts & Humanities	5	4.81
	Other	28	26.92

TABLE 2
DEMOGRAPHIC INFORMATION OF THE PARTICIPANTS IN QUALITATIVE PHASE

No.	Name	Nationality	Gender	Degree	Academic Title	Discipline
1	Amal	Saudi	Female	Ph.D.	Assistant Professor	TESOL
2	Fatimah	Saudi	Female	Ph.D.	Assistant Professor	TESOL
3	Nasser	Saudi	Male	Ph.D.	Assistant Professor	Medicine
4	Ahmad	Non-Saudi	Male	Ph.D.	Language Instructor	TESOL
5	Rajab	Non-Saudi	Male	M.A.	Language Instructor	Applied Linguistics
6	Abdullah	Non-Saudi	Male	B.A.	Language Instructor	Applied Linguistics
7	Khaled	Non-Saudi	Male	B.A.	Language Instructor	TESOL
8	Roger	Non-Saudi	Male	B.A.	Language Instructor/ PDU coordinator	Education

* Pseudonyms are used to protect the interviewees' privacy.

C. Data Collection and Analysis

(a). Quantitative Instruments and Procedures

The survey was adopted from Ene and Mitrea (2013) and underwent modifications to match the research objectives during the first phase. The survey had four sections, which aligned with the research questions: (1) beliefs about the importance of writing, (2) writing instructional practices, (3) institutional support, and (4) professional development needs. The instrument used a 5-point Likert scale to measure items, while the pilot test ensured clarity and reliability of the instrument. The survey data underwent statistical analysis through SPSS version 20 before receiving descriptive analysis (e.g., frequencies and percentages) and inferential statistics (e.g., means, standard deviations) to reveal patterns and differences between variables. The twenty-seven Likert-scale questionnaire items achieved high reliability through Cronbach's alpha measurement, which produced a value of $\alpha = 0.872$ to detect statistical relationships in responses.

(b). Qualitative Instruments and Procedures

The interview guide was developed based on the initial survey findings, allowing for a more in-depth exploration of key issues identified in the first phase of data collection. The open-ended questions provided participants with space to share their experiences and challenges, along with their ideas about writing instruction and teacher training improvement. The interviews took place in English while being recorded by audio and lasted between 40-60 minutes. The thematic analysis of data used a coding framework that matched the four research questions to enhance the questionnaire results. The development of themes began through inductive methods before receiving refinement through multiple coding iterations. The interpretation phase brought together qualitative data to explain and contextualize the quantitative results.

IV. RESULTS

This section shows findings from the quantitative analysis of survey responses, which align with the four research questions and the emerging themes: (1) teachers' beliefs about the importance of writing, (2) writing practices used by instructors, (3) institutional support for writing instruction, and (4) teachers' professional training needs.

A. Teachers' Beliefs About the Importance of Writing

The survey data indicated that all writing instructors agreed that writing is an essential tool for students to achieve academic progress. A total of 75.3% of the participants rated writing as the "most important" language skill for their students, which was relatively higher than the percentages of speaking (69.4%), reading (64.7%), and listening (47.1%). The results showed that writing instructors consider writing as the basis for language proficiency and academic performance, as well as disciplinary achievements.

Teachers were also asked to rate their level of preparedness to teach writing. The majority of the participants were self-assured about their teaching readiness, as 43.9% said they were "well prepared" while 41.1% said they were "very well prepared." The combined percentage of 85% implies that most instructors had either taken courses in writing or had plenty of teaching experience. However, 15% of respondents admitted to being "poorly prepared," indicating that several instructors lack proper pedagogical training or continuous professional development for writing instruction.

The qualitative responses from the participants' interviews helped to define the reasons behind these beliefs. Abdullah stated that "*writing as a skill forms an essential part of the growth of every student wanting to be able to write different kinds of items during the professional career or college life.*" According to Fatimah, academic writing is "*extremely, extremely important*" for all students in university programs, both native and non-native speakers. Rajab and Nasser also stated that writing is a critical component in all university programs and classes.

B. Writing Practices Teachers Engage in

The survey data indicated that there were many classroom practices in writing instruction, but traditional and product-based approaches seemed to be the most prevalent. The results showed that 58.8% of instructors "very often" corrected grammar in students' papers, and 54.1% of them frequently commented on the ideas and organization of a students' paper. The results showed that teachers provided considerable feedback, with an emphasis on sentences and paragraphs.

However, more interactive and process-oriented practices were reported less frequently. Only 24.7% of teachers "very often" asked students for more than one draft of an assignment, and 27.1% asked the students to review each other's papers. These practices were considered integral to process writing approaches but appeared to be underutilized. Moreover, only 45.9% "very often" explained the grading criteria to students when starting a writing project, which might indicate that grading criteria were not always transparent.

The different teaching methods used were also shown in the answers to the multiple-choice question on educational methods. Some instructors reported the use of communicative, integrated, or problem-based approaches, but the most common methods were grammar-focused and product-based approaches. The selection of these approaches may be due to the following factors: institutional pressure to teach students for exams, many students, and limited professional development opportunities in process and genre-based pedagogies.

C. Institutional Support for Teaching Writing

The participants had differing perceptions on the support and professional development activities (e.g., workshops, conferences, webinars) they had the opportunity to attend from their institution for teaching writing. Professional development (PD) was only available to 15% of the instructors on a monthly basis, while 36.4% attended such events once in a semester. Furthermore, the majority of respondents (48.6%) indicated they attended either zero or one PD event yearly, thus revealing a significant difference between needed professional development opportunities and what institutions provide.

Participants also reported demanding workloads. Many teachers (37.4%) spent between 4 to 6 hours per week planning and preparing for writing classes, while another 45.9% spent more than 4-6 hours per week grading writing assignments. More than 37.6% of the respondents had 31 or more students per class, which means class sizes were too large for effective personalized feedback, revision cycles, or writing conferences.

The participants indicated multiple institutional resources which would enhance their support for student writers, including teaching assistants for coaching and evaluation of student writing and peer mentors for assignment design and assessment, together with dedicated instructional time for writing tasks and department- or college-level writing centers. The participants demonstrated a common understanding of structural obstacles to effective writing education and expressed their wish for increased institutional funding for writing education.

D. Teachers' Professional Training Needs

Participants showed strong and specific interest in professional training specifically designed for improving their writing teaching abilities. The majority of participants (63.6%) identified formal L2 writing pedagogy coursework as their top priority, while an additional 6.5% considered it important. The survey results demonstrate that EFL writing instruction requires specialized teaching methods that standard teacher education programs do not provide. Participants

rated EAP/ESP courses as their top priority (48.6%) followed by training and courses in writing assessment (45.8%). Next, strategies for providing feedback to students based on information from tests and assessment rated as (43%), followed by designing and assessing writing tasks and tests (39.3%), and, finally, participation in professional conferences and meetings (43%).

V. DISCUSSION

This study investigated university writing instructors' views together with their practices, university support, and professional development needs in Saudi EFL settings. The study provides comprehensive details about how writing education appears to instructors and students and shows how actual classroom instruction deviates from theoretical set standards. The following discussion summarizes the main findings by linking them to prior research and contextual issues in the study.

A. Beliefs About the Importance of Writing

The research findings demonstrated that university teachers identify writing as the most critical language skill for students to learn (75.3% considered writing more important than speaking and reading and listening). Previous research by Hyland (2022) and Lillis and Scott (2007) highlighted writing to be vital for academic growth and discipline-specific communication. 85% of teachers who reported being (very) well-prepared in their teaching abilities likely stem from their extensive classroom experience along with their advanced degrees, since most participants had either a master's or a doctorate degree.

Several studies from the region have confirmed the persistent issue of EFL instructors starting to teach writing without proper writing pedagogy training (Alkodimi & Al-Ahdal, 2021). Abdullah emphasized the essential role of academic writing for university programs in the Saudi EFL context, noting that "*we need more focus on writing than other academic skills because of the contextual factors that students... in their high schools or in their lower studies... focus on reading and listening and speaking more than writing*". Writing does not receive sufficient attention during early education, so Khaled believed students "*need to work on this skill*" before reaching university. The difference between their expressed beliefs about writing and their actual preparedness indicates that effective writing practice depends on purposeful educational programs combined with mentoring support.

B. Instructional Practices in Writing Classrooms

Traditional methods, including grammar correction and organizational feedback, remain dominant teaching approaches (Aloairdhi & Alhojailan, 2024; Mahboob & Elyas, 2014). The results show that the limited use of process-oriented techniques, including asking for multiple drafts (24.7%) and peer review (27.1%), indicates a mismatch between research-based writing education and classroom teaching practices.

The constraints of large classes, combined with excessive grading tasks that many participants experienced, lead to this observed gap. Fatimah stated that "*there's no, no time [for teaching writing effectively] in terms of the foundation year students*" which prevented the full implementation of "*the writing process approach*". These teaching conditions restrict the implementation of activities that need individualized attention and repeated student participation. The students' ability to meet assignment requirements and learn self-regulated writing techniques may be impaired when teachers spend longer hours grading students' assignments (Lee, 2013).

The observed teaching patterns demonstrate typical issues that exist in EFL classrooms where writing receives insufficient attention because of restricted curricula and excessive focus on individual grammar elements (Alkodimi & Al-Ahdal, 2021). Roger, a PDU coordinator, confirmed that the teaching staff are "*encouraged to use communicative methods*" like "*process writing*". Teachers observed that students "*respond better to the product approach*" where they "*want to have a model or an example of what they're heading towards*". The data indicated that instructors place more emphasis on writing instruction, but their teaching methods remain limited by traditional educational methods alongside insufficient training and institutional requirements.

C. Institutional Support: Gaps and Pressures

The results from the survey demonstrated that institutions fail to provide sufficient support for writing education. Professional development opportunities focused on writing were accessible to just 15% of teachers, and more than 20% indicated minimal access to such opportunities. Amal confirmed that the university offered multiple types of support through "*weekly memos*" which provided details about "*workshops*" and the "*writing center*" that provided "*one-to-one sessions*" and "*consultation*" but noted that individual choice determined resource utilization. This finding supports Alkodimi and Al-Ahdal's (2021) finding that Saudi universities provide insufficient resources and show little institutional value for writing instruction.

Teachers experience a high workload, including preparing and grading, that reaches 4–6+ hours weekly because of structural barriers that prevent them from adopting best practices such as individual feedback and student conferencing. Fatimah identified two major obstacles in teaching student writing, which stemmed from "*35 to 40 students*" in her classes and insufficient time to provide appropriate feedback. She emphasized the lack of "*professional development courses*" at both the university and department levels that focused on teaching writing effectively. Teachers require

additional teaching assistants and writing centers alongside time reassignment to support writing instruction, as international experts Richards and Farrell (2005) recommend.

The absence of writing-focused infrastructure in the university creates additional work for instructors who must handle the teaching of academic writing independently. The university curriculum does not emphasize writing sufficiently according to Abdullah, yet *"the writing center as a separate entity"* can offer *"specialized professionals who not only diagnose the weaknesses, the errors in writing, but can also design special project-based writing to cater to their needs in a customized fashion."* Teachers who lack institutional support through collaborative teaching and writing fellowships and mentoring programs are less likely to attempt new educational methods or maintain writing-intensive courses.

D. Professional Development and Training Needs

The instructors wanted professional development that included systematic and prolonged education focused on teaching writing methods. The survey results showed that courses about L2 writing instruction (63.6%), EAP/ESP (48.6%), assessment (45.8%), and feedback (43%) received the highest rankings from teachers. The current global research supports teacher education in L2 writing instruction because it goes further than standard TESOL teaching methods (Borg, 2015).

Most teachers have to wait at least a semester for PD opportunities, yet they need more frequent professional development. This mismatch demonstrates how institutional training programs do not meet the actual needs of instructors. Teacher development needs more than random workshops because it requires continuous practice, communities together with mentorship programs, and reflective areas where teachers can exchange and modify their instructional methods. Nasser showed minimal interest in *"academic writing sessions"* but actively sought professional development opportunities that focused on *"strategies"* and *"business."* He recommended that writing training should connect to *"research"* to make it more attractive. He also emphasized two important points regarding teacher development by demanding dedicated time for professional growth and external motivators, which include *promotion* or *"annual evaluation"* as incentives.

Most teachers selected specialized writing strategies over general teaching methods as essential for better instruction. The teachers selected professional learning opportunities that targeted specific writing skills over general teaching approaches. The instructors now recognize the specialized knowledge needed for teaching academic writing effectively while teaching English in Saudi Arabia is linguistically and culturally complex. Abdullah emphasized that *"some teachers lack the proper methodology for teaching writing,"* as many were *"educated in grammar translation methods"* rather than the *"communicative approach and the modern, process-oriented approach to writing"* that *"demands a lot of diligence from [the] teacher"*. He supported contextualized training for teachers which addresses classroom-specific *"problems and solutions"* instead of providing *"general"* workshops.

VI. CONCLUSION

This study employed a mixed-methods sequential explanatory design to examine writing teacher beliefs and their instructional practices, institutional support, and training needs in a Saudi university context. The findings demonstrated that teachers maintain a unified view about writing's academic significance and simultaneously demonstrated motivation for better pedagogical approaches. Despite the stress on the importance of writing, they maintained product-oriented approaches, while process-based and student-centered methods remain restricted.

Research conducted earlier has demonstrated that EFL curricula fail to value writing sufficiently because of institutional and structural barriers. The teachers display high levels of self-assessment readiness, yet their classroom actions often result from classroom size constraints and insufficient training, and a lack of educational support systems that also appear in regional research.

The research identifies multiple critical possibilities for development in this direction. The participants demonstrated a strong interest in professional development that focuses on teaching second language writing and academic writing (EAP/ESP) as well as assessment and feedback methods, which align with current best practices for writing teacher education. The interest in skill-specific education above general teaching methods shows how Saudi EFL instructors now recognize the unique knowledge needed for teaching writing effectively.

This research makes an important contribution to the under-investigated domain of academic writing education in Saudi universities. The study demonstrates both teaching staff dedication and institutional barriers to writing instruction while showing the necessity for coordinated institutional strategies to enhance writing instruction. Two possible steps are recommended to enhance writing instruction: creating writing centers and decreasing student-teacher ratios. These steps allow for personalized feedback and revision, along with designing writing-specific professional development programs that match local academic requirements and integrating process-based and genre-informed writing methods into all language curriculum levels.

Future research should investigate how writing-focused professional development programs affect students over time and analyze students' experiences with writing instruction across different academic subjects. Research about student experiences with different writing pedagogies would create valuable knowledge to enhance writing results. Writing

instruction in EFL contexts, especially in Saudi Arabia, will remain essential for student academic achievement and language development because writing importance continues to rise in global professional and academic fields.

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Promoting Gender Equality in EFL Education: A Study of Textbook Representation and Teacher Perceptions in Northern Iraq

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Abstract—This study focuses on the representation of gender stereotypes in *Sunrise* EFL textbooks (Grades I–XII) used in public schools in Northern Iraq, as well as on teachers' insights regarding these representations. The analysis centers on four key areas: the social roles of adults, housework roles, educational roles, and professional roles, taking into account variables related to school type. A mixed-methods approach—combining qualitative and quantitative content analysis—was employed. A questionnaire was used to achieve the main objective of the study. The findings reveal that men are often portrayed as dominant, while women are depicted as passive and confined to domestic settings. According to the data, teachers' perceptions confirm that cultural gender ideologies continue to reinforce gender segregation in high schools. Based on these findings, the study recommends that educational authorities develop clear guidelines to address gender bias in EFL education in order to promote gender inclusivity, particularly in developing countries.

Index Terms—gender inequality, content analysis, *Sunrise* textbooks, Role Belief

I. INTRODUCTION

Education plays a pivotal role in shaping individual and social identities, and schools serve as key institutions in this developmental process. According to Freeman and McElhinny (1996), a school is an organization in which learners seek to discover both their personal and social selves. In this context, the institution fosters a meaningful connection between its structured environment and the students it serves. Language textbooks, as essential components of the educational system, play a particularly significant role in the teaching and learning process. Scholars who analyze these materials are instrumental, as textbooks contain the foundational elements of language instruction (Richards, 2009; Lee & Collins, 2010; Ullah & Skelton, 2013; Wells & Moon, 2019; You et al., 2019; Acheson et al., 2020; Kumar et al., 2021). Ahmad and Shah (2014) argue that in the English as a Foreign Language (EFL) context, teachers regard textbooks as the essential foundation for instruction, as students are introduced to the foreign language through these materials. Moreover, as Lee (2019) notes, “textbooks not only teach students how to read and write, but they also play a key role in inculcating virtues valued by society, whether intended or unintended, in the form of a hidden curriculum” (p. 204). Our central concern regarding the hidden curriculum is the portrayal of gender in EFL textbooks. This issue has received considerable attention from authors, policymakers, and educational researchers within the field of English language teaching and learning. In some countries, cultural backgrounds influence the tendency to prioritize one gender over another.

As a result, the dominance of male-centered narratives in educational textbooks has become widespread across the Middle East and has even influenced English-speaking communities. Many researchers have concluded that issues related

to gender representation in textbooks are ongoing and can negatively impact learners' perceptions of gender roles within society. Explicit forms of gender bias are particularly evident in the contexts in which teachers observe and evaluate students' abilities or inabilities to perform certain tasks. These biases also influence how gender characteristics are understood and internalized. Furthermore, such perceptions are shaped by various instructional elements, including specific lessons, teacher feedback, classroom behavior, and educational resources (Titus, 1993; Sadker & Sadker, 1994; Tatar & Emmanuel, 2001; Ullah & Skelton, 2013; Namatende-Sakwa, 2018; Lee, 2019; Jiang et al., 2022).

II. LITERATURE REVIEW

Gender equity encompasses numerous critical aspects of society. Various stakeholders—including governments, textbook publishers, and authors—play a significant role in shaping the content of EFL coursebooks, contributing a range of perspectives. It has been argued that both EFL learners and teachers face ongoing challenges and opportunities in navigating these educational materials (Li et al., 2022; Alam et al., 2023; Barjestesh et al., 2025). A substantial body of work by scholars such as Hartmann and Judd (1978), Alptekin (1993), Kabira and Masinjila (1997), Ansary and Babaii (2003), focuses on issues of gender equity. While many textbook authors, publishers, and policymakers are aware of gender-related concerns, they often unintentionally perpetuate stereotypical norms rather than addressing gender inequity directly.

Some researchers argue that the persistence of gender-biased content in textbooks is part of a larger systemic issue within the educational supply chain, leaving a lasting negative impact on students' social development. According to Abdelrady et al. (2022), Assefa et al. (2023), and Barjestesh et al. (2025), textbooks are powerful tools that educate learners about social relationships and the broader fabric of human interaction. Language, as they argue, holds immense power—not only in conveying emotion but also in shaping individuals' perceptions of the world. In some cases, even a single word can influence a person's decision-making or worldview. When left unexamined, language can exert a subtle yet profound humanistic influence, potentially leading to the marginalization of specific learner groups—especially when rooted in gender role stereotyping.

Titus (1993) explains that gender roles influence human thought, emotions, and behavior in complex ways, as they reflect the social, cultural, and psychological dimensions of masculinity and femininity within specific contexts. Supporting this view, Islam and Asadullah (2018) highlight that the degree of gender stereotyping in textbooks varies across countries—for instance, Malaysian and Indonesian textbooks tend to present more equitable representations of women compared to those used in Bangladesh and Pakistan.

As Sunderland (1994) aptly states, “The most non-sexist textbook can become sexist in the hands of a teacher with sexist attitudes.” This highlights that the school environment as a whole—beyond just teacher perceptions—plays a crucial role in shaping students' understanding of gender. In addition to educators' attitudes, the materials and methods used in teaching significantly influence how gender roles are conveyed. Sikes (1991) emphasizes that teachers must actively address gender stereotypes and their impact on students' personalities in order to combat the differentiation, discrimination, and bias often embedded within educational institutions. Lee (2019) further notes that gender bias and harassment remain persistent issues in Japanese society, where students often lack the opportunity or platform to express themselves openly.

The present study aims to build a bridge between textbook content and classroom realities by analyzing how gender is presented in textbooks used across the Kurdistan Regional Government (KRG) from primary through high school. Additionally, the study investigates public school teachers' perceptions of gender role stereotypes, examining how their beliefs influence their educational practices. Ultimately, this research explores how male and female representations evolve in EFL textbooks from the early grades to secondary education.

III. METHODOLOGY

This study focuses on evaluating the visual and verbal elements employed by teachers while teaching *Sunrise* textbooks across Levels 1 to 12 in primary and high schools. Specifically, the study analyzes gender stereotypes present in these materials, as such stereotypes can be harmful to society by reinforcing limited and prescriptive roles for males and females. Shannon and Hsieh (2005) observed that the use of content analysis in research increased significantly, with 97 studies utilizing this method between 1991 and 2002. Similarly, Kyngäs and Elo (2007) found that nearly 70% of methodological papers published in the 21st century employed content analysis, while only about 15% relied on statistical quantitative data. Based on these findings, this study adopts content analysis as the primary method for examining gender representation in the *Sunrise* textbooks.

Research Questions

- 1: What is representation of gender stereotypes in *Sunrise* textbooks of high and primary schools?
- 2: What are the effects of gender stereotypes on linguistic material of *Sunrise* textbooks of high and basic schools?
- 3: What impact do gender stereotypes have on the visual content of *Sunrise* textbooks used in high school and primary education?
- 4: How we measure the level of perception of a high school teacher about gender stereotypes?
- 5: How we measure the level of perception of a basic school teacher?

6: What is difference between high school teacher and basic school teacher's perception of gender stereotypes?

Participants and Setting

To investigate teachers' perceptions, data were collected from a sample of 390 teachers across 25 schools (16 primary and 9 high schools) within the city of the Kurdistan Regional Government (KRG). Specifically, 250 teachers (64.1%) were from primary schools, while 140 teachers (35.9%) were from high schools (Grades 10 to 12). All participants were subject teachers of Mathematics, English, Arabic, and Kurdish.

Instruments

Twelve textbooks were used as instruments in this survey to determine the actual frequency of gender representation—specifically, the portrayal of men and women. The questionnaire employed a non-probability sampling technique for data collection.

The Questionnaire

The questionnaire was based on the data design developed by Christensen and Massey (1989). It utilized the Communication Patterns Questionnaire (CPQ), which is widely recognized for its self-report measures and assessment of communication patterns. A 5-point Likert scale was employed for the analysis. The questionnaire included statements categorized according to specific criteria:

- Educational Role Beliefs: Items 1 to 11 (n = 11)
- Domestic Role Beliefs: Items 12 to 19 (n = 8)
- Professional Role Beliefs: Items 20 to 28 (n = 9)
- Adult Social Role Beliefs: Items 29 to 32 (n = 4)

Materials

This study focuses on the English language textbooks known as the *SUNRISE* series, which are used in public schools within the Kurdistan Region of Iraq (KRG). The *SUNRISE* textbooks are divided into two main educational levels: the basic education level, which comprises nine textbooks (Grades 1–9), and the high school level, which consists of three textbooks (Grades 10–12). The textbooks for Grades 1–6 contain a total of 18 units, Grades 7–9 include 7 units, Grade 10 consists of 10 units, Grade 11 contains 9 units, and Grade 12 comprises 8 units.

Data Collection Procedures

This study examines gender representation in the *Sunrise* textbooks used in public primary and secondary schools. It focuses on three key areas: statistical representation, linguistic and visual content, and teachers' perceptions.

IV. RESULTS AND DISCUSSION

To examine the textual and pictorial content, the researchers employed content analysis. The primary objective of the study was to investigate the representation of male and female roles in English language textbooks. As previously mentioned, twelve textbooks used from Grades 1 to 12 were analyzed. For each book, three major categories were examined: textual (documented), linguistic (dialectal), and visual (graphical) content. Finally, the study also explored teachers' perceptions of gender stereotypes and their impact on students' social development.

Text Analytics:

This term refers to the analysis of the frequency of male and female characters, their occupations, and domestic roles as depicted in textbooks. Although gender role expectations differ across societies and cultures, each group upholds specific norms that influence how gender is represented.

Analysis of male and female attributes:

This section analyzes the representation of males and females through gendered nouns and pronouns in the *Sunrise* textbooks for Grades 1 to 12. The results of the textual analysis for *Sunrise 1*, focusing on the ratio of male to female characters, are as follows:

TABLE 1
ANALYSIS OF *SUNRISE* LEVEL 1-12 DETERMINED BY THE RATIO OF MALE TO FEMALE CHARACTERS

Textbook	T. value of group	Male	Percentage	Female	Percentage
Level 1	15	8	53.3	7	46.7
Level 2	6	3	50.0	3	50.0
Level 3	134	91	67.9	43	32.1
Level 4	140	91	65.0	49	35.0
Level 5	121	99	81.8	22	18.2
Level 6	100	47	47.0	53	53.0
Level 7	960	467	48.6	493	51.4
Level 8	721	316	43.8	405	56.2
Level 9	861	509	59.1	352	40.9
Level 10	847	606	71.5	241	28.5
Level 11	862	471	54.6	391	45.4
Level 12	842	681	80.9	161	19.1
Total	5609	3389		2220	

The results of the textual analysis of *Sunrise* textbooks (Grades 1–12) were compiled to assess the proportion of male to female character representation. Overall, female characters were underrepresented in comparison to their actual proportion in both the general population and school enrollment. In contrast, male characters were frequently portrayed in prestigious occupations.

In *Sunrise 1*, male characters accounted for 53.3% of the representations, while female characters represented 46.7%, indicating a higher degree of male visibility. In *Sunrise 2*, gender representation was balanced at 50% for both males and females. However, *Sunrise 3* showed a significant disparity, with males comprising 67.9% of the characters and females only 32.1%. Similarly, in *Sunrise 4*, males held 65% of the representation, whereas females made up just 35%.

Gupta and Lee (1990) conducted a similar study and found consistent results, highlighting the underrepresentation of female characters compared to males. In *Sunrise 5*, this disparity was even more pronounced, with male characters accounting for 81.8% and female characters only 18.2%.

Interestingly, *Sunrise 7* and *Sunrise 8* demonstrated a reversal of this trend, with female characters outnumbering male characters. In *Sunrise 7*, females represented 51.4% and males 48.6%, while in *Sunrise 8*, females accounted for 56.2% compared to 43.8% for males.

In the remaining textbooks for Grades 9 through 12, male dominance in character representation re-emerged. For instance, in *Sunrise 10*, male characters were featured 71.5% of the time, while females appeared in only 28.5% of the content. A similar pattern was observed in *Sunrise 12*, where male characters constituted 80.9% of the depictions, matching the findings of Ansary and Babaii (2003), who reported female representation at just 19.2% and male representation at 80.9%.

Assessment of occupational roles

This section evaluates the portrayal of male and female characters in occupational roles within the *Sunrise* textbooks (Grades 1–12), with a focus on the gender-based distribution of work-related activities.

TABLE 2
EXAMINATION OF OCCUPATIONAL ROLES

Textbooks		Occurrence	%
Level 01	Male	1	0.09
	Female	1	0.09
Level 02	Male	1	0.09
	Female	1	0.09
Level 03	Male	6	60.00
	Female	4	40.00
Level 04	Male	4	57.14
	Female	3	42.85
Level 05	Male	7	70.00
	Female	3	30.00
Level 06	Male	7	63.63
	Female	4	36.36
Level 07	Male	6	60.00
	Female	4	40.00
Level 08	Male	12	75.00
	Female	4	25.00
Level 09	Male	19	67.85
	Female	9	32.14
Level 10	Male	13	76.47
	Female	4	23.52
Level 11	Male	23	65.71
	Female	12	34.28
Level 12	Male	23	65.71
	Female	12	34.28

Law and Chan (2004) proposed a system for classifying occupational roles by gender, categorizing them into five types. This study focuses on two of these categories: controlled male and dominated female, to analyze gender role representation in the *Sunrise* textbooks. As shown in Table 2, neither male nor female characters in *Sunrise 1* and *Sunrise 2* were assigned any occupational roles, resulting in a total count of zero and a corresponding percentage of 0%.

In *Sunrise 3*, male characters occupied 60% of the occupational roles ($n=6$), while female characters accounted for 40% ($n=4$). Similarly, in *Sunrise 4*, male characters held a dominant position in occupational roles with 57.14% ($n=4$), compared to female characters who represented 42.85% ($n=3$).

No substantial difference was found between male and female characters in *Sunrise 5* and *Sunrise 6*. In *Sunrise 5*, male characters comprised 70% ($n=7$), while female characters accounted for 30% ($n=3$). On the other hand, *Sunrise 6* features a nearly equal distribution of male and female characters in professional roles. Males occupied 63.63% ($n=7$) of the occupational roles, whereas females held 36.36% ($n=3$).

A minor discrepancy can be observed in *Sunrise 7*, where male characters held the majority of occupational roles, comprising 60% ($n=6$), while female characters represented 40% ($n=4$). In *Sunrise 8*, male characters were more prevalent in occupational roles, holding 75% ($n=12$), compared to 25% ($n=4$) for female characters.

In *Sunrise 9* and *Sunrise 10*, there is a significant disparity between the two character types. In *Sunrise 9*, males represented 67.85% (n=19), while females accounted for 32.14% (n=9). This disparity is particularly pronounced in *Sunrise 10*, where male characters significantly outnumber female characters in occupational roles—males held 76.47% (n=13), and females held only 23.52% (n=4).

Finally, a comparable observation can be noted in *Sunrise 11* and *Sunrise 12*. In both textbooks, male characters occupied 65.71% (n=23) of the occupational roles, while female characters accounted for 34.28% (n=12).

Examination of internal roles

TABLE 3
EXAMINATION OF HOUSEHOLD RESPONSIBILITIES

<i>Sunrise</i>	Father	Mother	Brother	Sister	Uncle	Aunt	Grandpa	Grandma	Husband	Wife
<i>level 1</i>	0	0	0	0	0	0	0	0	0	0
<i>level 2</i>	0	0	0	0	0	0	0	0	0	0
<i>level 3</i>	4	11	8	8	6	4	3	4	0	0
<i>level 4</i>	4	10	9	10	0	3	2	2	0	0
<i>level 5</i>	6	12	14	14	3	3	2	2	0	0
<i>level 6</i>	8	12	3	15	5	5	0	0	0	0
<i>level 7</i>	10	10	7	7	0	0	2	0	0	0
<i>level 8</i>	0	8	7	9	0	0	0	0	0	0
<i>level 9</i>	9	8	9	10	0	0	0	0	0	5
<i>level 10</i>	6	5	6	10	0	0	0	5	0	0
<i>level 11</i>	23	10	9	18	0	0	0	0	11	6
<i>level 12</i>	11	17	3	2	0	0	0	0	2	5
<i>Total</i>	81	103	75	103	14	15	9	13	13	16
Total Males: 192 (43.43%)										
Total Females: 250 (56.56%)										
Total: 442 (100%)										

Two fundamental issues were observed in this section. It highlights two key concepts: masculine generic constructions and man-compounds, both of which reflect traditional gender roles (e.g., *father*, *mother*). Among the 442 characters analyzed, 192 are male (43.43%) and 250 are female (56.56%). Despite the higher numerical representation of female characters, male characters appear more frequently in domestic roles.

Linguistic Analysis of Books:

When the researchers analyzed these textbooks (Grades 1–12) from a linguistic point of view, they identified two domains that were measured: the first is *inclusive language*, and the second is *male-associated compounds*.

Inclusive and Male-associated compound

When the gender of a person is unspecified, generic masculine pronouns such as *he* and terms that include *man* are often employed to refer to individuals regardless of their sex. However, linguistic analysis of *Sunrise 1* revealed no instances of the masculine pronoun *he* or any man-related compounds. In contrast, *Sunrise 2* demonstrates a more inclusive approach by employing neutral alternatives for both genders. For instance, the pronoun “s/he” is used to refer to either male or female characters, as seen in: “S/he is my friend” (*Sunrise 2*, p. 2) and “S/he has a/an...” (p. 3). No instances of masculine generics or man-compounds were found in *Sunrise 3*, 4, 5, 6, 7, 8, 10, and 12. However, the analysis of *Sunrise 11* presents a neutral portrayal of gender. For example, when discussing a local businessperson, the accompanying adjectives are gender-neutral, making the description applicable to both males and females. These adjectives are presented in a way that allows the phrase to be interpreted as either “his” or “her” constructive operation. Similarly, in another example, “A pilot is required to experience years of training before they can complete the job,” the use of the singular *they* maintains gender neutrality, as the gender of the character is not specified. In *Sunrise 9*, both masculine and feminine pronouns are used in a balanced manner, as illustrated in the sentence: “She/he is a charming young boy/girl.” These instances demonstrate that options for both genders were provided, allowing flexibility in interpretation based on context.

Overall, these observations highlight an evolving awareness of gender inclusivity in language use. Promoting gender equity through such linguistic representation aligns closely with the broader goals of education.

Adjectives

This section emphasizes the use of positive and negative adjectives to characterize male and female figures in the *Sunrise* textbooks. Table 4 illustrates how gender is represented through the use of adjectives for both sexes. Upon interpreting the results, it becomes evident that more adjectives are used to describe male characters compared to female characters. Of the total adjectives identified, 58 (58.6%) were used positively for males, while 41 (41.4%) were used for females.

In terms of negative descriptions, 43 adjectives (58.1%) were used for male characters, compared to 31 (41.9%) for female characters. Overall, the findings suggest that male characters are more frequently described using both positive and negative adjectives, whereas female characters are associated with fewer adjectives overall and slightly less negative characterization than their male counterparts.

TABLE 4
GENDER DEPICTION AND THEIR ADJECTIVE

	Constructive Adjectives		Adverse Adjectives	
	Male	Female	Male	Female
<i>level 1</i>	1	1	1	1
<i>level 2</i>	1	1	1	1
<i>level 3</i>	4	5	4	3
<i>level 4</i>	4	3	7	4
<i>level 5</i>	3	2	5	3
<i>level 6</i>	5	4	4	4
<i>level 7</i>	8	3	3	4
<i>level 8</i>	5	6	2	6
<i>level 9</i>	8	6	4	4
<i>level 10</i>	6	12	10	3

Gender role stereotypes portrayed in the pictographic content of *Sunrise* textbooks in High Schools and Basic Schools

Pictorial Analysis

This section reports the results that are gained from *SUNRISE* textbooks from 1-12 illustration shown in Table 5.

TABLE 5
PICTORIAL ANALYSIS OF MALE AND FEMALE CHARACTERS IN ALL *SUNRISE* TEXTBOOKS

<i>Sunrise</i> Textbook Series	Male	Female
<i>level 1</i>	124	148
<i>level 2</i>	167	94
<i>level 3</i>	218	25
<i>level 4</i>	288	294
<i>level 5</i>	291	245
<i>level 6</i>	286	321
<i>level 7</i>	271	153
<i>level 8</i>	137	120
<i>level 9</i>	136	120
<i>level 10</i>	251	133
<i>level 11</i>	471	391
<i>level 12</i>	128	145
Total	2768	2189
Percent	56%	44%

The results indicate a total of 4,957 male and female characters represented in the illustrations. Of these, male characters accounted for 2,768 (56%), while female characters comprised 2,189 (44%). This data illustrates that male characters were depicted more frequently than female characters. These findings suggest a consistent pattern across most *Sunrise* textbooks, where female figures were underrepresented in comparison to their male counterparts.

TABLE 6
RESPONSES FROM TEACHERS FOR EACH ITEM, COMPARING HIGH SCHOOL AND BASIC SCHOOL, ORGANIZED BY DOMAIN

	Average	SD	Average	SD
Educational Perspectives				
Element 1 Boys are slower than girls to read	2.28	0.96	2.87	1.30
Element 2 Girls are quieter than boys	1.78	0.79	2.34	1.21
Element 3 Boys and girls can't work together	3.34	1.27	2.52	1.19
Element 4 Female enrollment in Higher education	2.39	1.25	2.62	1.23
Element 5 Discipline and young men	1.74	0.69	2.86	1.38
Element 6 young boys with academic achievements	3.75	1.29	2.37	1.40
Element 7 Boys and challenging physical activities	2.09	0.93	2.05	1.20
Element 8 young men and math	2.63	1.29	2.96	1.44
Element 9 young boys and ability to think logically	2.01	0.98	2.93	1.46
Element 10 Girls and software basics	2.79	1.30	2.56	1.39
Element 11 Wives and education	1.84	0.98	3.23	1.35
Domestic Role Opinions				
Element 12 Men and household chores	2.70	1.48	3.37	1.37
Element 13 Men as final decision maker	3.31	1.51	2.28	1.36
Element 14 Men's suitability for childcare	1.76	0.91	2.55	1.36
Element 15 Gender Equality for women	3.52	1.39	3.15	1.24
Element 16 Child-rearing responsibilities	4.07	1.01	2.50	1.23
Element 17 Role of women in household	3.70	1.10	2.64	1.22
Element 18 Young boys engaging with dolls	2.59	1.01	3.98	1.20
Element 19 Young women involved in athletics	2.19	1.10	3.16	1.44
Perspectives of Professional Roles				
Element 20 Employment opportunities for men	3.93	0.81	2.87	1.41
Element 21 Men in leadership roles	3.76	1.22	2.75	1.40
Element 22 Job income of females	2.56	1.21	3.08	1.36
Element 23 Female managers in companies	3.07	1.14	3.00	1.38
Element 24 Men employed under a female supervisor	3.86	1.22	2.62	1.37
Element 25 Female mechanics	3.10	0.95	3.27	1.37
Element 26 Male army officers	3.56	1.38	2.48	1.30
Element 27 Female police officers	1.96	0.94	3.24	1.35
Element 28 Female politicians	2.24	1.10	3.00	1.38
Adult Community Role Opinions				
Element 29 Men in leadership roles	3.68	1.42	2.31	1.36
Element 30 Participation of females in community events	2.70	1.35	3.10	1.40
Element 31 Females' usage of nicotine	2.64	1.02	2.02	1.01
Element 32 Women and divorce	2.36	1.52	2.42	1.46

Instructive Role Opinions (Elements 1–11):

The results reveal that the majority of respondents demonstrated varying degrees of equitable beliefs. Secondary (high) school teachers generally exhibited more independent and equitable perspectives across most elements, with particularly strong equitable beliefs in Element 2 (87.2%, avg. 1.78), Element 5 (89.3%, avg. 1.74), and Element 9 (79.2%, avg. 2.01). In contrast, basic (primary) school teachers expressed more balanced or equitable beliefs in selected elements, such as Element 2 (64.0%, avg. 2.34), Element 3 (57.6%, avg. 2.52), Element 6 (66.4%, avg. 2.37), and Element 10 (56.8%, avg. 2.56). Element 6 reflected neutrality among secondary teachers (70.0%, avg. 3.75). Notably, the final element showed a clear contrast: secondary teachers exhibited strong equitable beliefs (83.6%, avg. 1.84), while primary teachers expressed a neutral stance (35.2%, avg. 3.23). Overall, secondary teachers demonstrated a stronger inclination toward equitable beliefs across the majority of elements.

Domestic Role Opinions (Elements 12–19):

Secondary school teachers demonstrated more equitable or democratic beliefs in Elements 12 (62.9%, avg. 2.70), 14 (85.0%, avg. 1.76), 15 (61.4%, avg. 3.52), 18 (46.4%, avg. 2.59), and 19 (65.0%, avg. 2.19). However, they showed more neutral or less equitable views in Elements 13 (55.0%, avg. 3.31), 16 (77.8%, avg. 4.07), and 17 (63.6%, avg. 3.70). In comparison, basic school teachers exhibited more democratic or equitable beliefs in Elements 13 (68.8%, avg. 2.28), 14 (61.6%, avg. 2.55), 16 (60.4%, avg. 2.50), and 17 (50.0%, avg. 2.64), but maintained neutral positions in Elements 12 (54.8%, avg. 3.37), 18 (74.4%, avg. 3.98), and 19 (39.6%, avg. 3.16). Overall, both groups displayed a combination of democratic and neutral viewpoints, with basic school teachers often exhibiting stronger democratic tendencies in this domain.

Professional Role Opinions (Elements 20–28):

Secondary school teachers mostly demonstrated neutral views across Elements 20–26, as indicated by high percentages and average values above 3.0. However, more equitable beliefs were observed in Elements 22 (50.7%, avg. 2.56), 27 (79.3%, avg. 1.96), and 28 (66.0%, avg. 2.24). Conversely, basic school teachers showed more equitable attitudes in Elements 20 (49.2%, avg. 2.87), 24 (54.8%, avg. 2.62), and 26 (58.8%, avg. 2.48), while maintaining neutral positions in the remaining elements. Notably, in Elements 27 and 28—where secondary teachers leaned toward equitable beliefs—basic teachers displayed more neutral responses (33.6%, avg. 3.24) and (37.6%, avg. 3.0), respectively.

Adult Community Role Opinions (Elements 29–32):

In Element 29, secondary school teachers exhibited neutral views (22.9%, avg. 3.68), while basic school teachers displayed more democratic beliefs (69.6%, avg. 2.31). In Element 30, secondary teachers leaned toward equitable views (57.1%, avg. 2.70), whereas basic school teachers maintained neutrality (42.0%, avg. 3.10). For Elements 31 and 32, both groups expressed equitable beliefs, although basic school teachers showed stronger democratic tendencies. Specifically, secondary teachers recorded 37.2% (avg. 2.64) and 63.6% (avg. 2.36), while basic school teachers registered 72.0% (avg. 2.02) and 63.2% (avg. 2.42), respectively.

V. CONCLUSION

The analysis of the *Sunrise* textbooks (Grades 1–12) reveals a clear gender bias, evident in the underrepresentation and stereotypical portrayals of women. Female characters are often depicted in traditional, low-paying roles such as childcare and retail, reinforcing passive traits and limiting career aspirations. These portrayals can negatively impact students' mental health and social development (Hutchinson & Torres, 1994). Gender-biased EFL workbooks perpetuate false narratives, offering limited opportunities for girls—symbolically granting them “only one third of the sky”.

Despite the pivotal role that textbooks play in shaping student perspectives, there is a lack of extensive research on the *Sunrise* series used in the Kurdistan Regional Government (KRG) education system. Previous studies on gender equity in textbooks include those by Amerian and Esmaili (2015), Samadikhah and Shahrokhi (2015), and Sulaimani (2017). Foundational research by Britton and Lumpkin (1977), Hellinger (1980), and Rezai et al. (2022) has also documented the global underrepresentation of women in educational materials.

While a few grades—particularly Grades 3 and 4—show comparatively stronger female representation, the overall content across the *Sunrise* series remains predominantly male-oriented. Scholars such as Briere and Lanktree (1983) and Sulaimani (2017) emphasize the urgent need for more balanced and inclusive learning materials. Notably, primary school teachers demonstrated more awareness and critical insight regarding gender bias than their secondary-level counterparts, highlighting the crucial role of teacher perception in fostering equitable and inclusive learning environments.

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The Poetics of Speculative Realism in Margaret Atwood's Select Works

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Abstract—Over the past two decades, Margaret Atwood has consistently defined her work as speculative fiction, pointing out the realistic foundation of her works, rather than imagining the future technology. Yet critics remain divided on how her works represent “reality” through imagination. Previous studies have primarily focused on speculative elements at the content and narrative levels, along with references to reality. This paper holds that her works are significantly different from the writing of traditional literature in terms of content and formal characteristics, especially in the cognitive and thinking levels such as speculative subjects, speculative narrative strategies and the use of cognitive modal words, but they are rooted in reality and reflect a speculative realism feature. The paper attempts to interpret Atwood's speculative novels—including *The Handmaid's Tale*, *The Testaments*, and *Oryx and Crake*—from the perspective of speculative realism. It aims to reveal the reality from the cognitive perspective presented by the author and characters, and analyze the artistic charm of Atwood's speculative fiction.

Index Terms—Margaret Atwood, speculative realism, speculative fiction, *The Handmaid's Tale*, *Oryx and Crake*

I. INTRODUCTION

Beginning with a New Scientist interview in 2008 and continuing through her essay collection *In Other Worlds: Science Fiction and the Human Imagination* in 2011, Margaret Atwood has consistently asserted that her work belongs to the genre of “speculative fiction” rather than “science fiction”, persistently urging readers to focus more on the “realism” inherent in speculative fiction. In her book *In Other Worlds*, Atwood emphasizes that her speculative fiction is rooted in present-day reality, projecting plausible logical extrapolations into the near future. However, critics remain divided on the specific dimensions where her speculative works demonstrate “realism”. Previous analyses primarily focus on the speculative elements within her content and narrative, as well as their references to reality. For instance, Bloom (2001) analyzes *The Handmaid's Tale*, using the depiction of Gilead society to confront contemporary social crises—such as religious extremism and gender oppression—compelling readers to confront the latent dangers within our own reality. At the formal level, the novel employs a framing device—pseudo-documentary techniques such as academic conference proceedings—to amplify its satirical intent, exposing contemporary social problems in the hope of catalyzing social and political change (p. 129). Winstead (2017) contends that Atwood employs speculative fiction to explore real-world political and economic issues, thereby expanding the boundaries of science fiction and emphasizing its realist qualities (pp. 228–246). Thieme (2023) analyzes speculative realism in Margaret Atwood's *MaddAddam* trilogy and argues that “she narrates her ‘speculative’ material in a style that creates its own reality through its succinct use of minutely realized, darkly comic detail” (p. 128). In recent years, with the rise of cognitive literature research, the subject's cognition, sensory experience and the reader's perception mechanism in literature have become the focus of research. From the perspective of cognitive stylistics, Harrison (2024) analyzes how readers construct a rich conceptual model of their own reality and alternative reality when reading *Oryx and Crake* (p. 164). This paper holds that previous studies have overlooked Margaret Atwood's exploration of character and narrator cognition at the stylistic level. By applying Text World Theory, narratology, and cognitive stylistics, this article analyzes the distinctive features of how the author and her characters conceptualize and articulate “reality” on cognitive and intellectual levels. This form of speculative thinking bears a direct ideological relationship with reality, leading this study to term it “speculative realism”. This approach also offers a new theoretical pathway for reinterpreting Atwood's works, thereby facilitating an investigation into the poetics of her speculative fiction.

II. SPECULATIVE REALISM

Realism in literature has been perhaps the most discussed and controversial topic within Western literary criticism for over a century; it is not a singular, fixed literary paradigm, but is constantly reshaped and reconstructed by the evolution of social, philosophical, and artistic concepts. Therefore, a plethora of terms have been coined to categorize different forms of realism, such as traditional realism in Victorian England in the 19th century, critical realism and socialist realism in the literature of the former Soviet Union, psychological realism represented by James and Woolf in the first half of the 20th century, and variants of realism in the post-modern context, namely magic realism, meta-realism and new realism. Since the mid-19th century, “realism”, whether as a literary practice, a literary movement or a literary theory or a critical theory, has always been accompanied by controversy and doubt.

Nevertheless, realism, as a mode of cognition or mental representation, has endured throughout history, despite the variation in its specific literary manifestations. Modern cognitive science has proved that “the neurobiological mechanisms interfacing us with the ‘real world’ largely overlap with those acting when we imagine fictional worlds both through images and words” (Pennisi & Falzone, 2020, p. 143). This mechanism is embodied simulation. The embodied cognition determines its inseparable characteristics from “reality”. Realism constitutes the foundational mode of artistic perception. Other aesthetic modes of cognition and representation either developed from or subverted realism, yet consistently exist in a state of interweaving with it—a dynamic that aligns with the principles of cognitive science. Wellek (1964) once stated that “realism appeals to a potent tradition in history” (p. 223). Judging from the development of cognitive science today, his statement still makes sense not only because Aristotle’s “imitation theory” laid a theoretical foundation for western realism, but also because the literature of all nationalities in the world is based on the same cognitive principle and follows the embodied simulation mechanism. Furthermore, considering the external world, writers cannot help but attend to the development of the real world—the very environment people are embedded in for survival. This attention provides the external impetus for their creative work. In different historical periods, writers face different situations. In today’s world, we are in the “Anthropocene” era together, and realism in line with the “Anthropocene” era came into being.

The Anthropocene is a new geological epoch proposed in 2000 by geochemist Paul Crutzen and biologist Eugene Stoermer, a term which designates an era in which human activities have come to dominate the evolution of the Earth system. The Anthropocene concept highlights that human beings have become a geological force. Specifically, human industrial production, energy consumption, and globalization processes have had an irreversible impact on the climate, ecology, and geological cycle. This concept not only reveals the far-reaching geological consequences of human actions but also fundamentally challenges the traditional “nature/culture” binary, transforming nature from a passive background into an active agent that co-exists and acts alongside human beings, as theorized by Latour. In response to the widespread environmental degradation of contemporary times, various forms of new realism have emerged in the fields of literature and art. As Lisa Ottum says, the Anthropocene functions simultaneously as a scientific designation and a narrative framework, effectively telling the story of humanity’s current position on Earth. Its reliance on plot and character elements is precisely what makes the Anthropocene a compelling subject for literary scholars (Reno, 2021, p. 17). Literary realism needs to adapt to this new environmental situation. What changes will happen to fiction? In *Anthropocene Realism Fiction in the Age of Climate Change*, John Thieme discusses 12 cases that employ realist fictional modes and analyzes how writers use their creative techniques to respond to the difficulties and challenges of world change. He asserts that climate fiction is more likely to generate an emotive impact because it frames complex environmental issues in a narrative form, contrasting with the relatively dispassionate approach of hard scientific data and statistics (Thieme, 2023, p. 1). Although the texts analyzed in this book are varied in form, they share the primary goal of detailing the consequences of human-caused climate change. Crucially, they achieve this purpose through diverse modes of realism that persistently examine the role of individuals within the social structure. Thieme’s (2023) core view lies in the power of various forms, which employ fiction to evoke readers’ emotional resonance, ultimately forging a social consensus on the reality of the climate crisis. Thieme attributed Atwood’s literary technique in the *MaddAddam* trilogy to “speculative realism”, that is, to make speculative imagination based on reality, and to create a narrative style that is both prophetic and realistic by combining speculative details with real-world problems. This style not only challenges the boundary between traditional science fiction and reality, but also prompts readers to reflect on humanity’s responsibilities and future within the Anthropocene. “Speculative realism” can be understood as a narrative strategy that combines speculative imagination with realistic details, such as the technology of bioengineering, pig organ transplantation, and disasters caused by climate change, embodied in the novel, which are not imaginary, but existing, developing, or theoretically possible in reality. From the linguistic point of view, Thieme also summed up Atwood’s extensive use of new words, such as “SoyOBoyburgers” and “Happicuppuchino”, and combined the “fiction” in form with the “reality” in content, which is the embodiment of “speculative realism” in literary form.

Based on Thieme’s (2023) research, this paper further discusses Atwood’s writing style: she is not only good at blending speculative imagination into reality-based narration, but also the speculative nature of her works is more deeply reflected in the cognitive thinking of the author and the characters on the reality, as well as the ideological and ethical orientation carried by this thinking form. To analyze this unique speculative poetics, this paper introduces text-worlds theory of cognitive poetics and combines the perspectives of narratology and cognitive stylistics to focus on the presentation of “philosophical speculation” in multiple text worlds, as well as the switching and collision between different worlds to convey deep themes and emotional impact. Text-worlds Theory is a cognitive-linguistic framework that explains how humans comprehend language by constructing mental representations, or “worlds”. It emphasizes the inseparability of text and context in a dynamic cognitive process. “World-switches” is a key concept in text-worlds theory, which refers to the temporal and spatial shift of our attention on the same ontological level when we are reading. It is not entering a completely different “possible world”, but adjusting the space or time coordinates within the parameter framework of the current “matrix text-world”(mostly in operation in a text). On the other hand, the modal world is a vertical move, entering a different ontological plane, such as a character’s desire, belief, dream, or hypothesis. Text-worlds Theory can assist, confirm, and even supplant the concept of “narrative levels” in explaining the internal structure of novels, thus providing a clearer framework for analyzing narratological topics such as narrator, narratee,

point of view, focalization, and diegetic and extradiegetic narration. While narrative levels remain a common topic in narratology, the presence of multiple world switches—including matrix, modal, and fleeting text-worlds—within the same narrative level allows for a more precise dissection of its internal structure.

This article will analyze Atwood's speculative novels through the lens of three key areas—speculative subjects, narrative strategies, and linguistic strategies—in order to discover the cognitive speculative discourse of the author and characters, and ultimately explore the poetics of speculative realism in Atwood's works.

III. SPECULATIVE SUBJECTS

Speculative fiction is essentially a testing ground for thoughts, relying on speculative imagination to break the limitations of human cognition. Throughout Atwood's speculative fiction over the past 30 years, almost all of them reflect realistic problems through fictional future society, and the background of such novels is usually set in a future totalitarian or dystopian society. Howells (2021), a famous scholar who studies Atwood, listed some core topics of Atwood's speculative fiction in *The Cambridge Companion to Margaret Atwood*, including "political, economic, social and environmental concerns" (p. 171). By employing Text-world Theory (Stockwell, 2020), we can see that in addition to the main topics expressed at the level of matrix text-world, Atwood also explores issues of freedom, power, control, and human nature in a realistic society, as manifested by the modal world-switches within the speculative discourse of her characters and narrators.

In *The Handmaid's Tale*, Atwood makes up an extremely autocratic future country, the Republic of Gilead, and shows how religion can be used as a political tool to rationalize the oppression of women and the whole society. Her works not only warn the reality by setting the background in the near future, but also reflect on the propositions of freedom, gender, power, and system in the real world in the speculative discourse of characters and narrators. In the fifth chapter, the protagonist Offred compares her previous life with the present one through memories:

"Though I never ran at night; and in the daytime, only beside well-frequented roads." ... "Women were not protected then." ... "Don't stop on the road to help a motorist pretending to be in the trouble. Keep the locks on and keep going. If anyone whistles, don't turn to look. Don't go into a laundromat, by yourself, at night." ...

"Now we walk along the same street, in red pairs, and no man shouts obscenities at us, speaks to us, touches us. No one whistles."

"There is more than one kind of freedom, said Aunt Lydia. Freedom to and freedom from. In the days of anarchy, it was freedom to. Now you are being given freedom from. Don't underrate it". (Atwood, 2010, p. 34)

Scholars often analyze this passage as a prime example through the lenses of patriarchal oppression and ideological discourse analysis. Bouson (1993) argues that this passage brilliantly reveals how Gilead enacts oppression by redefining "freedom," and highlights the resultant contradictions and hypocrisy inherent in this ideology. In the name of providing "security" and "protection" (freedom from), the regime deprived women of their basic human rights and autonomy (freedom to), but in fact, it only replaced the previous with one systematic oppression, and put women, especially handmaids, in a situation of humiliation, isolation, and contempt (p. 140). Amin Malak believes that Atwood has constructed a bipolar opposition here, forcing readers to criticize: we should be alert to a society where "excessive choice" leads to moral disintegration. We should be more alert to a totalitarian society that deprives all people (including oppressors) of their free will and humanity in the name of "providing security" and turns life into a prison (Bloom, 2001, p. 7). Weiss (2009) believes that the most insidious operating mechanism of totalitarianism is revealed here, and the victims may actually become "collusion" of the oppression system, because they (at least subconsciously) accept the distorted "protection" provided by this system (pp. 120–141).

Analyzing this speculative discourse from the perspective of the text-world theory, the author constructs three text worlds: Text World 1: The past (the past America-the era of "freedom to") is a chaotic and dangerous place, and women need to keep a high degree of vigilance and implement a series of rules ("Don't ..." and "Don't ...") to seek safety. The "freedom" here is freedom to but the price is exposure to danger and harassment. Text World 2: "Now" (the Republic of Gilead-the era of "freedom from"). This world is constructed as a highly controlled, orderly, but oppressive place. Superficial security is achieved through extreme gender segregation, surveillance, and deprivation of personal freedom. Women's bodies are protected, but at the cost of their personality and autonomy. Text World 3: Aunt Lydia's world of consciousness, which is a modal world, constructed by Aunt Lydia's remarks, and represents the official ideology of the Gilead regime. The role of this world is to redefine the concepts in the first two text-worlds. It tries to compare the chaos of "Text World 1" with the control of "Text World 2" and demonstrate the superiority of the latter. This ideological filter forms a strong tension with the narrator's personal memory of "Text World 1" and his personal experience of "Text World 2", which constitutes the core conflict of the novel. The profound irony and critical effect are produced by the juxtaposition and contrast of multiple text-worlds, coupled with the intervention of Aunt Lydia, who attempts to reconcile these opposing ideological worlds. The author guides readers to reflect on what real freedom is. Any utopian promise that seeks to exchange "absolute security" for absolute control and the deprivation of individual rights will inevitably culminate in the darkest dystopia. By its nature, freedom has always been complex, risky, and demanding of defense; it cannot be reduced to a simple, either-or option.

IV. SPECULATIVE NARRATIVE STRATEGIES

In the narration of Margaret Atwood's speculative fiction, there are some speculative narrative features forming a profound philosophical reflection on reality, which can be primarily summarized into the following aspects. The first is the narrative perspective shift. When the author wants to "speculate" on a topic, the narrative perspective usually turns to the second person, which is divided into two situations: one is independent segmentation, forming the narrator's argument in most cases; the other situation is that there is no independent prominence in form, which usually belongs to the inner monologue of the character. This shift is not only a narrative skill, but also a skip to a discourse world constructed by the author, involving the classic roles of communication participants, such as speakers, writers, and their respective audiences (e.g., listeners or readers). The participants are traditionally engaged in a direct exchange, like a pair in a discussion or a writer and the recipient of their text (Stockwell, 2020, p. 160). Some textual information is shared and known by the communicators (the writer and reader), while other content is known only to the characters or agents within the story itself. The content of these hypothetical textual environments varies: some details are available to the people discussing the text (the writer/reader), but other details are exclusively known to the characters/performers inside the text (p. 166). In speculative discourse, the content is accessible to both reader and character/narrator participant, and the author clearly delineates the speculative sub-world from the matrix text-world in order to provoke readers' reflection and achieve common ground. The richness of the speculative sub-world is carried in the reader's existing memories, knowledge, and experience shape their understanding, incorporating both objective meanings and personal feelings. It draws upon the reader's whole background—knowledge, memories, and past experiences—to create meaning, which includes both factual interpretations and emotional responses (p. 162). When the narrative turns to the second person ("you"), the reader is directly drawn into the sub-world of the character or narrator. This narrative mode implies the universality of speculative activities: it is not only the personal thinking process in the text world, but also the thinking state that readers may experience. In this way, the writer promoted the individual consciousness activity to a universal philosophical thinking. For example, in Margaret Atwood's fiction *The Testaments*, Aunt Lydia confessed in *The Ardua Hall Holograph*:

... How can I regain myself? How to shrink back to my normal size, the size of an ordinary woman?

But perhaps it is too late for that. You take the first step, and to save yourself from the consequences, you take the next one. In times like ours, there are only two directions: up or plummet. (Atwood, 2019, p. 32)

The passage opens with a first-person internal focalized narrative ("I") but promptly shifts to the second-person perspective ("you"). This shift in narrative perspective directly draws the reader into the character's sub-world. Through this technique, Atwood skillfully universalizes Aunt Lydia's personal dilemma—the step-by-step compromises made for self-preservation—transforming it from a specific character's soliloquy into a psychological process that any individual (i.e., the reader) facing moral quandaries might undergo. The matrix text-world represents the narrative reality of Gilead, while the phrase "you take the first step... you take the next one" constructs a speculative space. The content of this sub-world is accessible to both the reader and the character/narrator participant. Readers are invited into this morally ambiguous space, where they fill it with their own cognition and emotions. When Aunt Lydia describes that point of no return, each reader draws upon their own understanding and feelings about "choices made under duress", "the cost of moral descent", or "systemic complicity" to give it substance. The power of the concluding statement—"there are only two directions: up or plummet"—stems not only from the text itself but also from the readers' emotional resonance with such extreme predicaments. In high-pressure environments, morality and rationality gradually yield to the instinct for survival. Through Aunt Lydia's confession, Atwood not only critiques how totalitarianism corrodes humanity through incremental compromises and false binaries but also points toward a hopeful form of resistance: by using narrative art to awaken the speculative capacity within every "you", she enables readers to recognize the universality of these mechanisms. This awareness, in turn, empowers them to remain vigilant against—and resist—ideological appeals that demand the abandonment of humanity for the sake of "ascending" or claim there is "no alternative".

In order to distinguish Atwood's speculative realism style from traditional psychological realism writing techniques, it is necessary to clarify the concept of speculation. Speculation is a high-order cognitive activity, which refers to a psychological process that requires complex thinking processing, active participation and deep reflection. It usually goes beyond the basic information reception or simple memory and involves the reorganization of knowledge, abstract reasoning and meaning construction. As Hana points out, "speculative imagining should be differentiated from more free-flowing modes of imagining, such as daydreaming or mind-wandering, because it's usually structured by some goals or parameters—questions like "what if?", "what would happen if?", or "why would this happen?" (Varis et al., 2023, p. 106)... The method starts with existing foundations—familiar skills, experiences, materials, or data—and proceeds through an extremely uncertain exploration to produce a transformation: a new understanding, combination, or artifact (p. 107). People's speculative consciousness activities are not the psychological imitation in traditional narratology, but the modal world in the form of ontology. In this way, speculative consciousness activities are liberated from the traditional narrative framework and become an artistic tool to explore profound propositions. At the same time, this kind of conscious activity constitutes a parallel mapping with the real world, rather than a mirror image of the traditional representation.

For example, at the beginning of Chapter 23 in *The Handmaid's Tale*, the protagonist, Offred, lies alone, imagining that she can escape from the totalitarian countries in the future.

When I get out of here, if I'm ever able to set this down, in any form, even in the form of one voice to another, ... It's **impossible** to say a thing exactly the way it was, because what you say can never be exact, you always have to leave something out, there are too many parts, sides, crosscurrents, nuances; too many gestures, which could mean this or that, too many shapes which can never be fully described, too many flavours, in the air or on the tongue, half-colours, too many. **But if you happen to be a man, sometime in the future, and you've made it this far**, please remember: **you will** never be subjected to the temptation of feeling **you must** forgive, a man, as a woman. It's difficult to resist, believe me. But remember that forgiveness too is a power. **To beg for it is a power, and to withhold or bestow it is a power, perhaps the greatest.** (Atwood, 2010, p. 144)

As the heroine starts from hypothetical inference (if) and thinks about her record of this period of history after her escape, she uses two cognitive modal words (will, it is impossible ...) with positive shades in succession, which strongly expresses the narrator's attitude towards the grand proposition of history and truth. Any narrative is a kind of "reconstruction", which cannot completely restore the facts. Language itself has limitations, and it can't capture all the complexity of reality ("too many parts, sides, cross currents, nuances"). As Jacques Derrida said, the structure and symbol system of language itself will lead to the extension of meaning, so language cannot directly reflect reality, but will distort, omit, or even reshape reality. The author takes this opportunity to question the historical narrative, alert readers to everything she tells, and remind us that the novel itself is also a kind of "reconstruction", not a real "historical" writing. "But if you happen to be a man....." In this sentence, the author changes the narrative perspective and uses the second person to call you four times. At this point, the narrative shifts from the activity of the characters in the possible world to the modal world of the narrator. Atwood raises a critical feminist question: Why must forgiveness become a passive responsibility for women, while men are exempt from this moral dilemma? In the patriarchal society, women are expected to forgive, understand and bear the faults of men. But men rarely need to bear such "forgiveness pressure"; they can escape the guilt, while women are always asked to learn to let go. "To beg for it is a power, and to withhold or bestow it is a power, perhaps the greatest." This sentence expresses the author's speculation on morality and power. Forgiveness is not always a moral virtue, but also a part of power relations. The author uses the uncertain tone of the modal word "maybe" to remind female readers to reflect again: you have the right to choose not to forgive, which is a kind of power in itself. Like Sarah points out, "I want to advocate for the dialogical nature of speculation...speculation never emerges in isolation...we are always saturated by previous social interactions" (Varis et al., 2023, p. 112). The author utilizes the speculative modal world to highlight the asymmetry of gender power structure in contemporary society, thereby seeking to encourage readers' deeper thinking, dialogue, and emotional resonance.

At the level of narrative voice, unreliable narrators lead readers to recognize the narrative's inherent incompleteness, prompting them to question the authenticity of "reality". However, it is precisely this uncertainty and ambiguity that embodies a more philosophical "cognitive reality"—one less concerned with factual accuracy than with how individuals understand, experience, question, and construct reality. For instance, in *The Handmaid's Tale*, Offred, as a first-person unreliable narrator, shifts between moments of clarity, vagueness, calm analysis, and indulgent fantasy. She often corrects herself, such as:

I made that up. It didn't happen that way. Here is what happened. (Atwood, 2010, p. 271)

...

This is the story, then.

...I went back to Nick...

...

I told you it was bad.

Here is how it goes. (p. 280)

This way of self-denial and backtracking makes her a typical unreliable narrator. However, this is not a technical narrative error, but rather an accurate reflection of the narrator's mental state: her perspective exposes the fragmentation of the subject's perception, unverifiable memory, and the uncertainty of truth within a totalitarian system.

In terms of narrative structure, Atwood's speculative fiction tends to feature open endings that move beyond the linear causality of the empirical world. Instead, they point toward a higher-order and more abstract cognitive reality, thereby reflecting the inherent uncertainty and incompleteness of the world itself. For example, at the end of Atwood's *Oryx and Crake*, the hero "Snowman/Jimmy" found three surviving human beings approaching, hiding in the grass with weapons, facing three possible actions: coming forward to contact them and trying to establish new social ties; stay hidden, continue to live alone and maintain the status quo; attack them, eliminate potential threats, and play the role of the only survivor. The novel does not clearly explain the Snowman's final choice, instead concluding with the internal monologue, "What should he do?" This ending transcends the unfinished plot; it constitutes three philosophical inquiries concerning human morality, cognitive ability, and survival logic. This ambiguity embodies Atwood's core intellectual pursuit as a speculative novelist, prompting readers to reflect on the future coexistence of human and non-human species.

V. SPECULATIVE LANGUAGE STRATEGIES

Regarding language, the characteristics of speculative realism decouple the text's meaning from the narrative

framework of the textual world. Instead, meaning is constructed within a non-temporal, speculative discourse. In formal terms, this is achieved through the use of modality words, which express the predictive, hypothetical, and uncertain attitude of characters or narrators. These include modal auxiliaries (e.g., must, might, should, will, could), modal adverbs (e.g., possibly, maybe, perhaps), and verbs and adverbs expressing cognition and speculation (e.g., know, think, seem). Furthermore, the author frequently employs free direct quotation (without quotation marks) to directly express the views of the author, narrator, or character. This technique creates a “figure” effect for the entire quotation, which is highly significant in terms of both its placement and its content.

In *The Handmaid's Tale*, Atwood fictionalizes an extremely autocratic future country, the Republic of Gilead, and shows how religion can be used as a political tool to rationalize the oppression of women and the whole society. In Chapter 14, the entire family is permitted to watch the TV news before the Ceremony—an action that underscores how, much like in many real-world nations, television news functions as a tool for government propaganda. After strict screening, it only shows the “victory” pictures recognized by the regime. Offred noticed the way the news was edited and the prisoners' expressions, and suspected that these pictures might be forged or carefully selected. At this time, it triggered her speculation:

...the news.

Such as it is: who knows if any of it is true? It could be old clips, it could be faked. (Atwood, 2010, p. 92)

They show us only victories, never defeats. Who wants bad news?

Possibly he's an actor. (p. 93)

Atwood exposes the manipulation of information and the resulting loss of truth under totalitarianism through these independent speculative discourses. The speculation of characters directly questioned the authenticity of news, suggesting that the countries in the world, like the totalitarian regimes in history (such as Nazi Germany and the Soviet Union), controlled people's cognition through forgery or selective reporting. The propaganda machines of other countries only show “victory”, cover up failures and create a false “invincible” image. This one-way narrative deprives people of their ability to judge reality and makes them blindly obey. The core ethical orientation of this speculative discourse is to expose how totalitarianism maintains power by manipulating information and depriving people of the right to know and judgment. In essence, the novel's questioning of “news” addresses a social problem deeply rooted in the real world, particularly the totalitarian political environment Atwood experienced during her 1984 visit to East Germany, an experience she also detailed in interviews. She stated that during the trip, she visited East Berlin, Poland, and Czechoslovakia, which gave her direct, personal insight into the nature of life under these supposedly utopian but ultimately totalitarian governments. She resumed writing the book upon her return to Toronto (Atwood, 2011). This firsthand encounter with states that controlled information and manipulated truth provided the crucial raw material for her depiction of Gilead's media ecology. Thus, her speculative fiction functions as a diagnostic tool, transforming the specific essence of life under mid-20th-century totalitarianism into a timeless critique of power's operation through information distortion. This critique resonates with unsettling relevance in our contemporary media landscape.

VI. CONCLUSION

Just as Atwood insists on the position of speculative fiction in her book *In Other Worlds*, it clearly shows her persistence in exploring the nature of reality. “What she defends as most crucial about speculative fiction is its closeness to ‘real’ speculation” (Winstead, 2017, p. 228). In other words, for Atwood, speculation is not to escape from reality, but to inquire and approach reality more intensely through hypothesis, deduction and imagination. The evolution of 21st-century realistic literature demonstrates that it has not succumbed to the challenges posed by modernism and postmodernism, but rather has been continuously revitalized through interdisciplinary dialogue spanning philosophy, cognitive science, and literature. As an extension of realism, speculative realism inherits the focus on social reality and the plight of human existence, yet breaks the traditional paradigm centered on reproducing reality. Instead, it turns to exploring reality's ontology and its multiple levels. The speculative themes, narrative strategies, and linguistic approaches summarized in Atwood's works are not merely derivations of human rational cognition, but also a refraction of social reality. Within the postmodern context, this form of speculation no longer seeks the ultimate answer. Instead, it deconstructs reality into a flowing network of meaning through uncertainty and the raising of questions. Future research can further explore the development of speculative realism in different cultural contexts, especially its application in non-Western literature. Furthermore, interdisciplinary perspectives, such as cognitive science and neuroscience, could be leveraged to analyze how the reality presented in speculation affects readers' cognitive models and perception of the world.

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Manufactured Obedience: Ideological Control in the Dystopian Visions of Huxley, Orwell and Bradbury

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Abstract—This paper conducts a comparative literary analysis of three seminal dystopian novels—Aldous Huxley's *Brave New World* (1932), George Orwell's *1984* (1949), and Ray Bradbury's *Fahrenheit 451* (1953)—to examine how ideological control is exercised through pleasure, surveillance, and censorship, respectively. Drawing on theoretical frameworks from Michel Foucault (disciplinary power, biopower), Louis Althusser (ideological and repressive state apparatuses), Antonio Gramsci (cultural hegemony), and Theodor Adorno and Max Horkheimer (the culture industry), the study reveals how each novel portrays distinct yet interrelated mechanisms of social control that suppress individual freedom and manufacture consent. Through close textual analysis, the paper explores how these dystopian visions reflect and critique evolving forms of authoritarianism, particularly in relation to modern concerns about digital surveillance, algorithmic manipulation, and the erosion of intellectual freedom. The findings indicate that while the methods of control differ—Huxley's pleasure-based conditioning, Orwell's fear-driven repression, and Bradbury's censorship-driven ignorance—all three authors converge on a central warning: that true freedom is imperilled when ideology is internalised and resistance becomes unthinkable. The paper concludes by emphasising the enduring relevance of dystopian literature as a tool for critical consciousness and democratic vigilance.

Index Terms—dystopian literature, ideological control, surveillance, censorship, Huxley and Orwell

I. INTRODUCTION

Human beings have always been preoccupied with understanding the nature of existence (Frankl, 2006, p. 23), raising fundamental questions about our social, political, and economic status, as well as inquiries into the nature of justice in the world. In seeking to unravel the complexities of life, it becomes crucial to examine why, despite our potential for harmony and peaceful coexistence, societies often descend into states of control, repression, and inequality. Why do certain groups seize power, inflict suffering, and create a world of injustice instead of allowing peaceful and harmonious coexistence?

In light of the prevailing reality of a world dominated by inequality and suffering, intellectuals, thinkers and humanists have consistently aspired to create a society free from injustices—a utopia, as defined by Merriam-Webster, where all individuals are treated equally, enjoy a fair distribution of wealth, and possess the freedom to express themselves and participate in socio-political issues relevant to their lives (Plato, *Republic*, 1.1; More, *Utopia*; Asimov, *Foundation*). However, this ideal vision remains largely confined to the realm of imagination. Reality, as depicted in many literary works, often reveals a world shaped by dystopian forces rather than utopian ideals—a world where power is concentrated in the hands of a few, and social control is maintained through manipulation, censorship, and oppression.

Dystopian literature serves as a critical mirror to contemporary anxieties, offering cautionary tales about the erosion of autonomy and the rise of ideological domination. Aldous Huxley's *Brave New World* (1932) presents a society governed not by fear, but by engineered pleasure and biological conditioning, producing passive citizens who willingly conform. George Orwell's *1984* (1949) depicts a totalitarian regime maintained through perpetual surveillance, historical revisionism, and psychological terror, where even thought is policed. Ray Bradbury's *Fahrenheit 451* (1953) explores a world where knowledge is extinguished through censorship and anti-intellectualism, resulting in a population indifferent to truth and critical inquiry.

This paper analyses these three novels through the theoretical lenses of Michel Foucault, Louis Althusser, Antonio Gramsci, and Theodor Adorno and Max Horkheimer. These frameworks help illuminate how power operates not merely through force, but through institutions, language, and culture—what Foucault (1977) called "disciplinary power," Althusser (1971) termed "ideological state apparatuses," Gramsci (1971) described as "hegemony," and Adorno and Horkheimer (2002) critiqued as the "culture industry".

The methodology is qualitative and comparative, involving close textual analysis of narrative structure, character development, and symbolic elements. By examining how each author represents control, conformity, and resistance, this study seeks to answer the following research questions:

1. How do *Brave New World*, *1984*, and *Fahrenheit 451* portray ideological control and the suppression of individual freedom?

2. In what ways do the mechanisms of control differ across the three novels, and what do these differences reveal about evolving fears of authoritarianism?
3. How do these dystopian visions resonate with contemporary concerns about surveillance, censorship, and the erosion of intellectual freedom?

The objective is to demonstrate that while Huxley, Orwell, and Bradbury employ different strategies, pleasure, fear, and censorship, their works converge on a central warning: the internalisation of ideology renders resistance nearly impossible, and the preservation of freedom requires constant vigilance.

II. DISCUSSION

Aldous Huxley's *Brave New World* (1932) presents a dystopian society where control is not enforced through overt repression, but through engineered pleasure, biological conditioning, and the systematic erasure of individuality. In the World State, freedom is not taken away—it is made irrelevant. Citizens are decanted, not born; conditioned, not educated; pacified, not punished. As Huxley (1932, 2007, p. 13) writes, "We also predestine and condition. We decant our babies as socialised human beings, as Alphas or Epsilons..." This process reflects Althusser's (1971) concept of Ideological State Apparatuses (ISAs)—institutions such as education, media, and family that shape consciousness to reproduce dominant ideology.

From infancy, citizens are subjected to hypnopaedia (sleep-teaching), a method of subconscious indoctrination that implants slogans like "Everyone belongs to everyone else" and "Ending is better than mending." This early psychological conditioning ensures that individuals internalise the values of the World State as natural and self-evident. As the Director of Hatcheries declares, "That is the secret of happiness and virtue, liking what you've got to do. All conditioning aims at that: making people like their unescapable social destiny" (Huxley, 1932, 2007, p. 16). This aligns with Foucault's (1977) notion of disciplinary power, where individuals regulate themselves because they have internalised norms. In *Discipline and Punish*, Foucault argues that the most effective power is invisible; it doesn't coerce, it shapes desire.

In the World State, citizens are not forced into obedience; they are engineered to love it. They are drugged with soma, a happiness-inducing drug that eliminates discontent. They are entertained by "feelies," immersive films that stimulate emotions without requiring thought. They are immersed in consumerism, which keeps them busy and distracted. This engineered happiness exemplifies what Adorno and Horkheimer (2002) critique in *Dialectic of Enlightenment* as the culture industry: mass entertainment that pacifies the public, discourages critical thinking, and promotes passive consumption.

Furthermore, Huxley's society embodies Gramsci's theory of hegemony, where the ruling class maintains power not through force, but by making its values appear universal and desirable (Gramsci, 1971). As Williams (1977, 1983, p. 206) observes, "Huxley's society reflects Gramsci's idea of hegemony through its ability to maintain control by making its values appear natural and desirable to its citizens." The state does not need to punish dissent because dissent does not exist—people have been taught to love their oppression.

Characters like Bernard Marx and Helmholtz Watson, who feel alienated and yearn for authenticity, highlight the cost of conformity. Bernard is described as "a bit of a misfit, a loner who preferred solitude over socialising with his peers" (Huxley, 1932, 2007, p. 54). Jameson (1991, p. 85) notes that "Bernard's marginalisation highlights the cost of individuality in a society that demands uniformity and consumption." Yet even their rebellion is contained and ultimately neutralised, reinforcing the novel's grim message: in a world where freedom is defined as the satisfaction of artificial desires, true autonomy is impossible. Huxley's vision is increasingly relevant today. As Thomson (2023) argues, modern consumerism and digital entertainment mirror the World State's use of pleasure to distract and pacify.

In stark contrast to Huxley's pleasure-driven dystopia, George Orwell's *1984* (1949) presents a world ruled by fear, surveillance and brute ideological enforcement. The Party maintains power through Repressive State Apparatuses (RSAs), the Thought Police, torture, public executions, and constant monitoring via telescreens. As Foucault's panopticon illustrates, the mere possibility of being watched leads individuals to self-regulate their behaviour. In Oceania, this is literal: "Big Brother is watching you." Citizens live in perpetual anxiety, knowing that any deviation, any unorthodox thought, will be punished.

Orwell's regime also employs ideological control through the manipulation of language and history. Newspeak is designed not to express ideas, but to eliminate them: "Don't you see that the whole aim of Newspeak is to narrow the range of thought?" (Orwell, 1949, 2008, p. 57). By shrinking the vocabulary, the Party ensures that rebellion becomes unthinkable. This aligns with Althusser's ISAs, where institutions like education and media reproduce ideology. In Oceania, the Ministry of Truth constantly rewrites the past, erasing facts and inventing realities, ensuring that the Party's version of truth is the only one that exists.

The Party's slogan, "War is Peace; Freedom is Slavery; Ignorance is Strength", epitomises Gramscian hegemony inverted: instead of winning consent through cultural leadership, the Party imposes ideology through terror and cognitive dissonance. As Jameson (1991, p. 89) notes, *1984* represents "the ultimate extension of power over the individual, where even thoughts are subjected to control and repression".

Winston Smith's doomed rebellion, his secret diary, his affair with Julia, and his quest for truth reveal the depth of the Party's psychological control. His final submission, declaring "I love Big Brother," demonstrates the terrifying success of

ideological domination. Orwell's warning is clear: when a state controls not only actions but thoughts, freedom is extinguished at its root.

Clark (2024) argues that Orwell's vision remains relevant in an era of mass surveillance, data mining, and facial recognition. Evans (2024, p. 45) notes that "dystopian fiction provides a vital lens for understanding modern digital control." Robinson (2023) observes an "incredible similarity between fiction and reality" in how dissent is managed today through algorithmic suppression and digital panopticism.

Orwell's depiction also resonates with contemporary concerns about deepfakes, disinformation, and the erosion of truth. In a world where AI can generate fake videos, edit historical records, and manipulate public perception, the Ministry of Truth no longer feels like fiction. The Party's method of "doublethink", holding two contradictory beliefs simultaneously, mirrors the cognitive dissonance many feel in today's polarised media landscape.

Moreover, the novel critiques not only state power but also the internalisation of surveillance. Citizens report each other; children spy on parents; even private thoughts are policed. This reflects Foucault's idea that power is not just top-down, but diffused throughout society. The telescreen is not just a tool of control; it becomes a mirror of the self, forcing individuals to police their own minds.

Ray Bradbury's *Fahrenheit 451* presents a third, yet equally terrifying, model of control: the systematic destruction of knowledge. Unlike Huxley's world of engineered pleasure or Orwell's regime of fear, Bradbury's dystopia emerges not from state-imposed terror, but from a society that willingly abandons books. As Captain Beatty explains, "We stand against the small tide of those who want to make everyone unhappy with conflicting theory and thought" (Bradbury, 1953, 2012, p. 56). Books are burned not because the state fears ideas, but because the public has come to reject them in favour of fast-paced entertainment and superficiality.

This dynamic reflects Foucault's disciplinary power operating through voluntary compliance: citizens internalise the ideology that books are dangerous or irrelevant. Simultaneously, Althusser's Ideological State Apparatuses function through media saturation, the wall-sized televisions, "parlour families," and relentless noise that replace critical thought with passive consumption. Guy Montag's transformation from book-burner to truth-seeker begins with Clarisse's simple yet disruptive question: "Are you happy?" That moment of cognitive rupture cracks the façade of contentment, awakening his awareness of societal emptiness. Bradbury's vision thus resonates with Adorno and Horkheimer's critique of the culture industry, while also illustrating Gramsci's concept of hegemony: the ruling ideology is not violently imposed, but passively accepted because it promises comfort and stability. The populace does not mourn the loss of books because they have been conditioned to forget their value entirely.

Montag's journey from obedience to rebellion is central to the novel's critique. Initially, he declares, "It was a pleasure to burn" (Bradbury, 1953, 2012, p. 1), but his encounter with Clarisse and his discovery of books awaken a desire for meaning. His internal conflict reflects the struggle between ideological conformity and individual awakening. As Jameson (1991, p. 112) notes, *Fahrenheit 451* is "a powerful condemnation of censorship and its consequences," highlighting how intellectual stagnation leads to the loss of personal liberty.

The novel's relevance today is undeniable. In an age of algorithmic filtering, book bans in schools, and declining reading habits, Bradbury's warning feels prophetic. Turner (2023) and Roberts (2022) argue that modern censorship is not always state-led, but often driven by public indifference and corporate control of information. Habermas (1989) notes the erosion of the public sphere, where rational discourse is replaced by spectacle.

Yet, Bradbury offers a glimmer of hope. Montag escapes to a community of "book people" who memorise literature to preserve it, a powerful metaphor for cultural resistance rooted in embodied knowledge. This suggests that resistance is possible through memory, education and solidarity. The novel ends with the promise of renewal: "We're going to start again..." (Bradbury, 1953, 2012, p. 158). This echoes the humanist belief in the resilience of knowledge and the possibility of liberation.

While Huxley, Orwell, and Bradbury differ in method, they converge on a central theme: obedience is manufactured, not forced. In Huxley's world, people obey because they are happy. In Orwell's work, they obey because they are afraid. In Bradbury's work, they obey because they are indifferent. Huxley warns that we may be controlled not by chains, but by pleasures so seductive that we forget we are unfree. Orwell warns that we may be crushed by a state that sees everything and punishes everything. Bradbury warns that we may stop caring about truth altogether. As Postman (1985, 2005, p. vii) observed, "Orwell feared that what we hate would ruin us. Huxley feared that what we love would ruin us." Bradbury feared that we would love neither, but simply forget. These visions are not mutually exclusive. Today, we see elements of all three:

- Mass surveillance (Orwell), data mining, facial recognition, government monitoring.
- Algorithmic entertainment (Huxley), social media, streaming platforms, dopamine-driven design.
- Erosion of public discourse (Bradbury), misinformation, book bans, and devaluation of reading.

Contemporary digital ecosystems exemplify this tripartite control: users are simultaneously monitored through data harvesting (Orwellian), pacified by personalised entertainment streams (Huxleyan), and gradually detached from complex ideas through information fragmentation (Bradburian). This integrated system operates so seamlessly that resistance often fails to materialise—not because it is crushed, but because it is never conceived.

Each novel uses a different mechanism to suppress freedom, but all rely on the internalisation of ideology:

In *Brave New World*, citizens are conditioned to love their servitude.

In *1984*, citizens are terrorised into submission.

In *Fahrenheit 451*, citizens are distracted into apathy. Yet, all three authors agree on one thing: freedom is not just the absence of restraint, but the presence of critical thought. When people stop questioning, when they stop reading, when they stop remembering, freedom dies, not with a bang, but with a whisper.

A comprehensive understanding of how power operates in dystopian societies emerges only when we compare the distinct yet interconnected methods of control employed in these three novels. As Butler (1997, p. 24) argues in *The Psychic Life of Power*, power is not only repressive but also productive—it shapes desires, identities, and perceptions through its discursive effects. This aligns with Foucault's (1977) view that power is not merely top-down, but diffused throughout society.

In *Brave New World*, Huxley presents a society where control is achieved through biopower and consumerist conditioning. Citizens are not oppressed; they are engineered to be happy. The World State uses genetic manipulation, hypnopaedia and soma to ensure that individuals never question their place in the hierarchy. This aligns with Foucault's concept of disciplinary power, where control is internalised and self-regulated. As the Director of Hatcheries declares, "All conditioning aims at that: making people like their unescapable social destiny" (Huxley, 1932, 2007, p. 16). The state does not need to punish dissent because dissent does not exist—people have been taught to love their servitude.

This form of control also reflects Louis Althusser's Ideological State Apparatuses (ISAs), institutions like education, media, and family that reproduce dominant ideology. In the World State, ISAs operate seamlessly: children are decanted, not born; they are conditioned, not educated; they are entertained, not challenged. The "feelies" and soma function as tools of the culture industry, a term coined by Adorno and Horkheimer (2002) to describe how mass entertainment pacifies the public and discourages critical thinking.

In contrast, Orwell's *1984* depicts a regime of overt repression and psychological terror. The Party maintains power through Repressive State Apparatuses (RSAs)—the Thought Police, torture chambers, and public executions. Surveillance is omnipresent: "Big Brother is watching you." Citizens live in perpetual fear, knowing that even a thought can be a crime. This reflects Foucault's panopticon, where the mere possibility of being watched leads to self-censorship and self-discipline.

But Orwell's regime also employs ideological control through the manipulation of language and history. Newspeak is designed to narrow the range of thought: "Don't you see that the whole aim of Newspeak is to narrow the range of thought?" (Orwell, 1949, 2008, p. 57). By shrinking the vocabulary, the Party ensures that rebellion becomes linguistically impossible. This aligns with Althusser's ISAs: the Ministry of Truth rewrites the past, the media distorts reality, and schools teach lies as truth.

As previously discussed, Bradbury's model centres on voluntary cultural abandonment rather than state coercion. This reflects Foucault's disciplinary power and Althusser's ISAs operating through cultural acquiescence: the Firemen function as ideological agents enforcing a worldview that citizens have already internalised. The omnipresent media—giant wall-sized televisions, "parlor families," and constant noise—replaces critical thought with passive consumption. Guy Montag's transformation begins when Clarisse's question, "Are you happy?", disrupts his ideological complacency, revealing the spiritual void beneath societal contentment. Bradbury's vision thus synthesises Adorno and Horkheimer's culture industry critique with Gramsci's hegemony: the ruling ideology requires no force because it is embraced as natural. Citizens no longer miss books because their capacity to desire complexity has been systematically eroded.

The relevance of these novels today is undeniable. Digital surveillance, data mining, and AI-driven content curation echo Orwell's telescreens and Huxley's soma. Book bans, censorship in education, and the decline of reading reflect Bradbury's warnings. The culture industry—now global and algorithmic—mirrors Adorno and Horkheimer's fears of mass manipulation.

As Evans (2024) argues, dystopian fiction provides a vital lens for understanding modern digital control. Robinson (2023) notes the "incredible similarity between fiction and reality" in how dissent is managed today. Consider the following real-world parallels:

- China's Social Credit System — a real-world version of Orwellian surveillance, where citizens are rated and punished for "untrustworthy" behaviour.
- TikTok's algorithm — a Huxleyan pleasure machine that shapes desires, promotes passive consumption, and discourages deep thinking.
- Book bans in US schools — a Bradburian erasure of challenging ideas, often targeting works on race, gender, and sexuality.
- Deepfakes and AI-generated disinformation — a direct echo of Orwell's Ministry of Truth, where reality is rewritten in real time.
- Corporate surveillance capitalism — where Google, Meta, and Amazon collect vast amounts of personal data, not to harm us, but to predict and shape our desires, much like the World State.

These are not isolated phenomena — they are interconnected systems of control that operate through ideology, not just force. Moreover, the rise of cancel culture, echo chambers, and algorithmic filtering shows how truth itself is under attack. The Party's slogan — "War is Peace; Freedom is Slavery; Ignorance is Strength" — now appears in the form of political spin, media bias, and cognitive dissonance. In this context, education becomes an act of resistance. Reading, critical thinking and open dialogue are not luxuries; they are necessities.

As Habermas (1989) warned, the public sphere is shrinking. But as Bradbury's "book people" show, it can be rebuilt, one memory, one text, one conversation at a time.

III. CONCLUSION: LESSONS FROM DYSTOPIAN FICTION

Huxley, Orwell and Bradbury offer three distinct yet interconnected visions of how freedom is suppressed in dystopian societies. Huxley reveals how pleasure and consumerism can numb critical thought; Orwell shows how fear and surveillance can crush the spirit; Bradbury demonstrates how censorship and anti-intellectualism can erase memory and meaning.

Together, they teach us that totalitarianism does not always arrive with boots and guns; it can come with smiles, screens, and silence. The most dangerous control is that which we do not notice, because we have been taught to desire it.

The theoretical frameworks of Foucault, Althusser, Gramsci, and Adorno and Horkheimer help us see beyond the surface, revealing how ideology operates through institutions, language and culture. These novels are not just stories; they are tools for critical consciousness.

In *Brave New World*, Huxley warns that we may be controlled not by chains, but by pleasures so seductive that we forget we are unfree. The World State uses conditioning, soma and entertainment to produce citizens who love their servitude. This reflects Foucault's disciplinary power, Althusser's Ideological State Apparatuses and Gramsci's hegemony—all working to make oppression feel natural.

In *1984*, Orwell warns that we may be crushed by a state that sees everything and punishes everything. The Party uses surveillance, Newspeak, and historical revisionism to dominate not only actions but thoughts. As Winston Smith is broken in Room 101 and finally declares, "I love Big Brother," we see the ultimate victory of ideological control.

In *Fahrenheit 451*, Bradbury warns that we may stop caring about truth altogether. Books are burned not because the state fears ideas, but because the public has rejected them in favour of distraction. Montag's journey from book-burner to truth-seeker shows that awakening is possible, but only through memory, education and solidarity.

These visions are not mutually exclusive. Today, we see elements of all three:

- Orwellian surveillance: facial recognition, data mining, social credit systems.
- Huxleyan distraction: social media algorithms, streaming culture, dopamine-driven design.
- Bradburian censorship: book bans, algorithmic filtering, deplatforming of dissent.

Social media platforms epitomise this convergence: they harvest personal data for surveillance (Orwell), deliver addictive content for pacification (Huxley), and suppress dissenting voices through opaque moderation (Bradbury)—all while users perceive themselves as free agents. This seamless fusion of control mechanisms makes contemporary ideological domination particularly insidious, as it operates beneath conscious awareness.

Yet, all three authors agree on one thing: freedom is not just the absence of restraint, but the presence of critical thought. When people stop questioning, stop reading, stop remembering, freedom dies, not with a bang, but with a whisper.

This paper has shown that while the methods of control differ, their goal is the same: to manufacture obedience. And the most effective obedience is voluntary. Future research could explore how emerging technologies, AI, deepfakes, and predictive policing intensify these dynamics. But the core lesson remains: freedom must be actively defended. Education, open discourse, and literary engagement are not luxuries—they are necessities. As we navigate an increasingly complex world, the dystopian imagination remains one of our most powerful resources for resistance.

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Lyrical Expressions of Love and Longing: A Sociocultural Linguistic Analysis of Didi Kempot's Javanese Songs

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Abstract—This study analyzed the sociocultural and linguistic complexity of the expression *kasmaran* (love and longing) in Didi Kempot's Javanese songs, examining how popular music reflects and shapes cultural values. Previous research on Didi Kempot has largely focused on musicological and sociological perspectives, leaving a gap in understanding the linguistic mechanisms through which these emotions are articulated. This study addressed that gap by systematically analyzing the linguistic forms and sociocultural meanings of *kasmaran* in his lyrics using a descriptive qualitative content analysis of selected songs. The findings identified nine linguistic forms of *kasmaran*: love, waiting, longing, seeking, remembering, hoping, reassuring, losing, and loyalty. Direct expressions of "love" (*tresna*) are often not dominant, instead replaced by more nuanced forms. Seven pragmatic meanings were uncovered, portraying the narrator as fragile yet loyal. These meanings include sadness from abandonment, profound longing, hope for return, expectation of a kept promise, pledge of loyalty, resignation, and lasting memory. The sociocultural dimension shows how these expressions embody Javanese values such as *cidra* (broken promise), patience, persistence, and honesty, often portraying men as emotionally vulnerable yet steadfast. The novelty of this research lies in its systematic mapping of the forms and meanings of *kasmaran* linguistically and socioculturally, making it the first to detail how Javanese language constructs emotional resonance in popular music. These findings contribute to cultural linguistics and pragmatics, offering insights into how universal emotions are conceptualized across cultures. Practically, this study underscores the role of popular music in reflecting and negotiating contemporary Javanese identities and values.

Index Terms—cultural values, Didi Kempot, Javanese songs, *kasmaran*, linguistic analysis

I. INTRODUCTION

Popular music serves not only as entertainment but also as a reflection and formation of social and cultural values within society (Barkathunnisha et al., 2019; Jellinek et al., 2019). As Tagg (2015) demonstrates, song lyrics play a crucial role in conveying emotions, framing collective identity, and strengthening cultural affiliations. In this regard, lyrics function as a rich symbolic medium for expressing the complexity of human affect and social dynamics, including romantic relationships, longing, and losing. Likewise, Middleton (1990) asserts that popular music actively shapes ideologies and structures of meaning within society through the symbolic representation embedded in lyrics and sound.

In Indonesia, music has long been integral to the expression of local and regional identities (Wallach, 2008). Within the Javanese cultural context, traditional and contemporary songs serve not only as entertainment but also as vehicles for preserving values, transmitting social norms, and representing the collective inner workings of society (Sutton, 1991). One of the central figures in the contemporary Javanese musical tradition is Didi Kempot, a legendary singer and songwriter from Surakarta, widely known as "*The Godfather of Broken Heart*" or "*Lord of Ambyar*" (Ayu &

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Hariyanto, 2022; Widyawati & Santoso, 2020). Through thousands of Javanese songs addressing themes of love, longing, and heartbreak, Didi Kempot successfully forged emotional bonds across generations and built fan communities with distinct cultural identities, such as “*Sadbois*” and “*Sobat Ambyar*” (Putra et al., 2022; Rachmatdana et al., 2021).

The popularity of Didi Kempot’s works illustrates how the emotional expressions in his lyrics resonate deeply with society, particularly through the use of the Javanese language to convey experiences of love filled with ambiguity, sadness, and hope (Normalita, 2020). His lyrics provide a space for articulating simultaneously personal and cultural emotions, a performative form of identity and affection unique to the contemporary Javanese cultural landscape (Amin, 2012; Hatley, 2015).

Several previous studies have examined the Didi Kempot phenomenon from various perspectives, ranging from musicology and the history of Javanese music to sociological analyses of fan communities and the shifting tastes of young people in popular culture. These studies highlight, among other things, how Didi Kempot frames melancholy within energetic musical compositions and revives appreciation for the Javanese language in the realm of popular music (Achmad et al., 2020; Widyastuti & Fateah, 2024). However, most existing analyses have focused primarily on musical dimensions, performative aspects, or broad thematic narratives, without deeply exploring the linguistic structures underlying the emotional expressions in his lyrics.

A particularly central concept is “*kasmaran*,” a term encompassing a spectrum of emotions such as love, longing, anticipation, and loss, which frequently appears in Didi Kempot’s work. However, this concept has not been extensively examined from a cultural linguistics perspective. Understanding how this emotion is linguistically articulated in Javanese is crucial for uncovering the connection between linguistic form, cultural meaning, and affective experience (Duranti, 1997; Wierzbicka, 2004). As Halliday (1978) points out, language is a means of communication and a socio-semiotic system that reflects and shapes sociocultural structures.

The absence of a comprehensive study on the linguistic forms and sociocultural meanings of “*kasmaran*” in Didi Kempot’s lyrics reveals a significant gap in the literature. This lack of focus on linguistic dimensions limits our understanding of how these lyrics shape, produce, and reflect emotional constructions within a Javanese cultural context. Moreover, language provides a primary window into how a society understands and expresses affection, social relations, and the values that bind them (Botha, 2006; Bueno, 2009; Wallace, 2012).

Against this backdrop, the present study strived to bridge this gap through a sociocultural linguistic analysis of Didi Kempot’s lyrics. The main objective was to systematically examine the forms and meanings of “*kasmaran*” within the context of Javanese culture. The novelty of this research lies in mapping nine forms and seven specific meanings of “*kasmaran*,” analyzed in depth from semantic and pragmatic perspectives within a local cultural framework. Through this approach, the study aims to contribute theoretically and empirically to linguistic and popular culture studies while broadening cross-cultural understanding of how emotion and identity are articulated through language.

II. METHOD

A. Research Design

The present study employed a qualitative approach with descriptive methods. This design enables an in-depth investigation of linguistic phenomena in their natural contexts, thereby capturing the complexity and nuances of emotional expression. A qualitative approach was chosen because it could provide methodological flexibility and allow researchers to uncover subjective meanings and interpretations within linguistic representations (Braun & Clarke, 2025; Hastie & Hay, 2012; Kusumaningsih et al., 2024; Petre & Costa, 2024; Pilcher & Cortazzi, 2024). Meanwhile, descriptive methods focused on detailed explanations of the form, meaning, and context of “*kasmaran*” (love) expressions in song lyrics, without testing statistical hypotheses (Denham & Onwuegbuzie, 2013; Kolb, 2012). This design is particularly well-suited to the study’s objectives, which seek to uncover the essence of affective expression in Didi Kempot’s lyrics through a linguistic and cultural lens.

B. Data and Data Sources

The primary data in this study consist of linguistic units in the form of words, phrases, or clauses found in Didi Kempot’s song lyrics that reflect expressions of *kasmaran*. Both explicit (directly stated) and implicit (implied) expressions were considered, with attention to the linguistic and social contexts underlying their use (Krippendorff, 2013; McLuckie et al., 2013). Accordingly, the analysis did not rely solely on the literal content of the lyrics but also incorporated interpretations of meaning based on sociocultural dimensions. In this regard, purposive sampling aligns with the qualitative research paradigm, as it prioritizes depth of data over broad generalization (Robinson, 2023). Accordingly, the data were drawn from four of Didi Kempot’s MP3 albums, which represent his most popular and comprehensive collections: *Didi Kempot’s Most Popular Full Album* (2020), *Didi Kempot The Best Campursari* (2020), *Didi Kempot: Cidro, Banyu Langit, Pamer Bojo* (2019), and *Didi Kempot’s 17 Best Collection Nonstop* (2017) (Iswatiningsih et al., 2021). From these albums, seven songs were purposively selected because of their consistent richness of emotional expression: *Terminal Tirtanadi* (TT), *Stasiun Balapan* (SB), *Tanjung Mas Ninggal Janji* (TMNJ), *Sewu Kuto* (SK), *Kangen Nickerie* (KN), *Banyu Langit* (BL), and *Tatu* (T).

C. Data Collection Techniques

Data were collected using documentation techniques, which involved intensive listening to song recordings and transcribing the lyrics from album sources. This listening process was complemented by note-taking, a common technique in linguistic studies for systematically identifying relevant linguistic elements (Obrzut & Mahoney, 2011). To ensure data validity, cross-verification was conducted by comparing the lyrics with multiple credible online sources, thereby minimizing transcription errors and ensuring textual accuracy (Antonis, 2014; Bamgbose, 2019). This step also reflects the principle of data triangulation, a key validation strategy in qualitative research (Jentoft & Olsen, 2019). Thus, the documentation process in this study went beyond mere transcription; it involved constructing a reliable database for linguistic and cultural analysis.

D. Data Analysis Technique

The data were analyzed using a content analysis approach, a systematic method for examining texts regarding meaning and symbolism (Krippendorff, 2013). The analytical framework was based on Lasswell's communication model: "*Who says what, in which channel, to whom, and with what effect?*" (Babaei et al., 2020; Ouiridi et al., 2014; Saliu, 2020; Sapienza et al., 2018; Wei et al., 2022). This approach was applied to explore how emotional messages are constructed in lyrics and how they embody sociocultural values. Furthermore, the analysis employed symbol coding, a technique for identifying, recording, and classifying affectively meaningful linguistic units (Kunnan, 2024). The procedure followed five stages: (1) data source exploration, (2) lyric listening and comprehension, (3) transcription and translation, (4) identification and categorization, and (5) interpretation of meaning. This combined use of linguistic and sociocultural perspectives demonstrates a multidisciplinary strategy for understanding language as a reflection of cultural identity and emotion (Panicacci, 2021).

III. RESULTS

An in-depth analysis of the speech data in Didi Kempot's song lyrics yielded significant findings in two main aspects: (1) the specific forms of expressions of infatuation and (2) the meanings and contexts in which these expressions are used. These results provide insight into how love and longing emotions are expressed linguistically and socioculturally in Didi Kempot's legendary works.

A. Forms of Expression of Infatuation in Didi Kempot's Lyrics

Based on the linguistic analysis of Didi Kempot's song lyrics, nine primary forms of expression of infatuation were identified. Collectively, these forms illustrate the broad spectrum of emotions experienced in romantic relationships, particularly those characterized by longing and anticipation. The nine forms are: (1) love, (2) waiting, (3) longing, (4) seeking, (5) remembering, (6) hoping, (7) reassuring, (8) losing, and (9) loyalty.

Interestingly, although "love" (*tresna* in Javanese) is the essence of *kasmaran*, it is often not directly or explicitly articulated in the lyrics. Instead, the songwriter (or narrator) tends to employ more nuanced and contextual forms of expressing *kasmaran*. For instance, intense waiting for a lover is depicted in the following excerpt.

"Rembulan sing ngilo ono segoro / Padhangono ati kulo / Pujaan hatiku ra teko-teko / Neng Nickerie lali kulo"
(KN/2/Puj/Waiting)

("The moon that reflects in the sea / Illuminates my heart / My beloved never comes / In Nickerie, she forgot me.")

Similarly, longing is vividly portrayed, often accompanied by imagery of sadness:

"Aku nangis, aku kangen / Janjine biyen kowe seneng." (KN/3/Ems/Longing)

("I cry, I miss / The promise was that you were happy.")

Each of these expressions is descriptive and resonates strongly with listeners. A complete overview of the nine expressions of love, along with supporting lyrical excerpts and corresponding linguistic units, is presented in **Table 1**.

TABLE 1
EXPRESSIONS OF LOVE IN DIDI KEMPOT'S JAVANESE SONG LYRICS

No	Forms of Expression	Song Lyrics	Language Units
1	Love	<i>Wis tak coba / Nglaliake / Jenengmu soko atiku / Sak tenane aku ora ngapusi / Isih tresno sliramu</i> (SK/2/Ex/Honest/Loving)	<i>Isih tresno</i> (still love)
2	Waiting	- <i>Rembulan sing ngilo ono segoro / Padhangono ati kulo / Pujaan hatiku ra teko-teko / Neng Nickerie lali kulo</i> (KN/2/Puj/Waiting) - <i>Sepine wengi iki / Neng kene aku ngenteni / Kesuwen-suwene wis pirang sasi</i> (KN/1/Time/Waiting) - <i>Neng Nickerie tak enteni / Gek muliho neng kene aku ngenteni</i> (KN/4/Tmt/Waiting) - <i>Ning Pelabuhan Tanjung Mas kene / Biyen aku ngaterke kowe / Ning Pelabuhan Semarang kene / Aku tansah ngenteni kowe</i> (TMNJ/3/Place/Waiting)	- <i>Ra teka-teka</i> (never came) - <i>Neng kene aku ngenteni</i> (I've been waiting here) - <i>Neng Nickerie tak enteni</i> (I've been waiting at Nickerie) - <i>Tansah ngenteni</i> (always waiting)
3	Longing	- <i>Aku nangis, aku kangen</i> (KN/3/Ems/Longing) - <i>Semana uga rasane atiku / Mung tansah nunggu tekamu / Ra krasa setaun kowe ninggal aku / Kangen, kangene atiku</i> (TMNJ/2/Time/Longing) - <i>Wis suwe, wis suwe, wis suwe / Kangen sing tak rasakke / Rasane, rasane, rasane / Rasane koyo ngene</i> (TT/2/Longing)	- <i>Aku kangen</i> (I miss) - <i>Kangen, kangen atiku</i> (Longing, my heart longs for you) - <i>Kangen sing tak rasakke</i> (This longing I've been feeling)
4	Seeking	<i>Lungamu neng endi / Pirang tahun anggonku nggoleki / Seprene durung biso nemoni</i> (SK/1/Seeking)	<i>Pirang tahun anggonku nggoleki</i> (For years I've been searching for you)
5	Remembering	<i>Senajan kowe ngilang, ra biso tak sawang / Nanging neng ati tansah kelingan</i> (T/1/Ex/Remembering)	<i>Neng ati tansah kelingan</i> (Still, in my heart, I always remember you)
6	Hoping	- <i>Senajan mung sedela ora dadi ngapa / Penting iso ngademke ati</i> (TMNJ/1/ Hoping) - <i>Jare lungo mung sedelo / Malah tanpo kirim warto / Lali opo pancen nglali / Yen eling mbok enggal bali</i> (SB/2/Hoping) - <i>Yo mung siji dadi panyuwunku / Aku pengin ketemu / Senajan waktumu mung sedhela / Kanggo tombo kangen jroning dodo</i> (SK/3/Hoping/Time/Longing)	- <i>Mung sedela ora dadi ngapa</i> (even a moment is fine) - <i>Mbok enggal bali</i> (come back soon) - <i>Siji panyuwunku, pingin ketemu</i> (There's only one wish of mine, I want to meet you)
7	Reassuring	<i>Neng kene, neng kene, neng kene / Aku ngenteni kowe / Aku kangen / Kangenku mung kanggo kowe</i> (TT/3/Reassuring)	<i>Kangen mung kanggo kowe</i> (My longing is only for you)
8	Losing	<i>Ning stasiun balapan / Rasane koyo wong kelangan / Kowe ninggal aku / Ra kroso netes eluh ning pipiku</i> (SB/1/Losing/Crying)	<i>Rasane koyo wong kelangan</i> (It feels like someone who lost everything)
9	Loyalty	<i>Rasane ngitung nganti lali / Wis pirang taun anggonku ngenteni / Ngenteni sliramu</i> (TT/4/Loyalty)	<i>Pirang tahun anggonku ngenteni</i> (For years I've been waiting for you)

B. The Pragmatic Meaning of Love Expressions

The love expressions articulated in the lyrics reflect complex psychological states, often portraying a fragile, tender, yet deeply romantic persona. At the same time, the narrator emphasizes loyalty, trust, and steadfastness toward their beloved, illustrating that they are not easily swayed or broken by unfulfilled promises. An analysis of the pragmatic meanings revealed that the love expressions in Didi Kempot's lyrics predominantly convey loneliness, longing, sadness, anticipation, hope, and resignation in the context of romantic relationships marked by separation.

More specifically, these love expressions could be grouped into seven main meanings: (1) sadness at being abandoned by a lover, (2) longing for a lover, (3) hoping to hear from the lover and for her return, (4) hoping the lover will remain true to their promises, (5) pledging loyalty and affection exclusively to the lover, (6) expressing resignation, and (7) remembering past memories with the lover. The sense of sadness over abandonment is depicted in lyrics that describe loneliness and loss in particular places.

"Ning Stasiun Balapan / Rasane koyo wong kelangan / Kowe ninggal aku / Ra kroso netes eluh ning pipiku." (SB/1/Losing/Crying)

("At the Balapan train station / It feels like someone who lost everything / You left me / Without realizing it, tears fell down my cheeks.")

Meanwhile, the hope that a lover will keep their promise is conveyed through disappointment at broken commitments.

"Jare lungo mung sedelo / Malah tanpo kirim warto / Lali opo pancen nglali / Yen eling mbok enggal bali." (SB/2/Hoping)

("You said you were only gone for a short while / Yet you sent no news / Did you forget, or have you truly forgotten? / If you still remember, please come back soon.")

The use of metaphor further intensifies these meanings. For example: *"Sewu kuto uwis tak liwati / Sewu ati tak takoni."* ("I've passed through a thousand cities / I've asked a thousand hearts."). This figurative expression illustrates the exhaustive search for a lost lover, underscoring both the hardship and the emotional desperation of the narrator, while simultaneously engaging the listener's empathy. Comprehensive details of these seven pragmatic meanings, together with the context of the utterances and their interpretations, are presented in **Table 2**.

TABLE 2
PRAGMATIC MEANING AND CONTEXT OF EXPRESSIONS OF LOVE IN DIDI KEMPOT'S JAVANESE SONG LYRICS

No	Meaning of Speech Acts	Song Lyrics	Description
1.	Sadness at being abandoned by a lover	- <i>Angin sing ngreridu ati / Pengen nangis / Ngetokke eluh neng pipi (MEks/PSdh/1/Banyu Langit)</i> - <i>Ning stasiun balapan / Rasane koyo wong kelangan / Kowe ninggal aku / Ra kroso netes eluh ning pipiku (MEks/PSdh/2/Stasiun Balapan)</i> - <i>Semana uga rasane atiku / Mung tansah nunggu tekamu / Ra krasa setaun kowe ninggal aku / Kangen, kangene atiku (MEks/PSdh/3/Tanjung Mas Ninggal Janji)</i> - <i>Rembulan sing ngilo ono segoro / Padhangono ati kulo / Pujaan hatiku ra teko-teko / Neng Nickerie lali kulo (MEks/PSdh/4/Ning Nickerie)</i> - <i>Sewo kuto uwis tak liwati / Sewu ati tak takoni / Nanging kabeh / Podo rangerteni / Lungamu neng endi (MEks/PSdh/5/Sewu Kuto)</i> - <i>Mongso rendeng wis ganti ketigo / Opo kowe ra kroso? (MEks/PSdh/6/Stasiun Tirtonadi)</i>	- The narrator feels sad and wants to cry at night when the gentle breeze reminds him of his beloved. - At Balapan Train Station, the narrator sheds tears because he feels lost when his lover leaves him - The narrator feels sorrow because he can only wait for his lover, who has left him for years. - The narrator hopes the moon reflecting on the ocean will illuminate his heart as he waits for his lover, who never returns. - The narrator searches for his lover across many places and asks many hearts, but no one knows where his lover has gone. - He waits for his lover, who has been gone until the third dry season passes.
2.	Longing for a lover	- <i>Aku nangis, aku kangen / Janjine biyen kowe seneng (MEks/PRind/1/Ning Nickerie)</i> - <i>Sepine wengi iki / Neng kene aku ngenteni / Kesuwen-suwene wis pirang sasi / Neng Nickerie kowe ra bali (MEks/PRind/2/Ning Nickerie)</i> - <i>Neng Nickerie tak enteni / Gek muliho neng kene aku ngenteni (MEks/PRind/3/Ning Nickerie)</i> - <i>Pirang tahun anggonku nggoleki / Seprene durung biso nemoni (MEks/PRind/4/Sewu Kuto)</i>	- The narrator cries, longing for his lover. - In his loneliness, the narrator longs for his lover and hopes for her return. - The narrator waits for his lover to return to Nickerie. - The narrator has tried to find his lover but has been unable to meet her.
3.	Hoping to hear from the lover and for her return	- <i>Ngalem neng dadaku / Tambanono roso kangen neng atiku (MEks/BPlg/1/Banyu Langit)</i> - <i>Banyu langit / Sing ono nduwur kayangan / Watu gedhe / Kalingan mendunge udan / Telesono / Atine wong sing kasmaran (MEks/BPlg/2/Banyu Langit)</i> - <i>Jare lungu mung sedelo / Malah tanpo kirim warto (MEks/BPlg/3/Stasiun Balapan)</i> - <i>Lali opo pancen nglali / Yen eling mbok enggal bali (MEks/BPlg/4/Stasiun Balapan)</i> - <i>Opo kowe ra kroso? / Yen kowe iseh seneng lan tresno / Kudune kowe kroso (MEks/BPlg/4/Stasiun Tirtonadi)</i>	- The narrator hopes his lover will embrace him to soothe his longing. - The narrator hopes the rain will wet and cool his heart, which is filled with love. - The narrator hopes his lover will send news of his whereabouts, even if only briefly. - The narrator hopes his lover will return soon if she still remembers him. - The narrator wonders if his lover still loves him and hopes she will remember him.
4.	Hoping the lover will keep their promises	- <i>Tanganmu tak kanthi / Kowe ngucap janji / Lungo mesti bali (MEks/TJanji/1/Stasiun Tirtonadi)</i> - <i>Janji lungu mung sedelo / Jare sewulan ra ono / Pamitmu naliko semono / Ning Stasiun Balapan Solo (MEks/TJanji/2/Stasiun Balapan)</i> - <i>Janjine lungane ra nganti suwe suwe / Pamit esuk lungane ra nganti sore / Janjine lungu ra nganti semene suwene (MEks/TJanji/3/Banyu Langit/)</i> - <i>Aku sih kelingan nalika ing pelabuhan / Kowe janji lunga ra ana sewulan / Nanging saiki wes luwih ing janji / Nyatane kowe ora bali-bali (MEks/TJanji/4/Tanjung Mas Ninggal Janji)</i>	- The narrator reminds his lover of the promise she made before leaving. - At the Solo Balapan Train Station, the narrator's lover promised she would not be gone for more than a month. - The narrator's lover promised him not to be away for too long when she left. - At Tanjung Mas Harbor, the narrator's lover promised to be away for less than a month, but now she has not returned.
5.	Promising loyalty and love	- <i>Ora lamis / Gedhene nggonku nresnani (MEks/JSet/1/Banyu Langit)</i> - <i>Telesono / Atine wong sing kasmaran / Setyo janji / Seprene tansah kelingan (MEks/JSet/2/Banyu Langit)</i> - <i>Gedhene nggonku nresnani / Nganti kapan / Aku ora biso lali (MEks/JSet/3/Banyu Langit)</i> - <i>Rasane ngitung nganti lali / Wis pirang taun anggonku ngenteni (MEks/JSet/4/Stasiun Tirtonadi)</i> - <i>Ning Pelabuhan Tanjung Mas kene / Biyen aku ngaterke kowe / Ning Pelabuhan Semarang kene / Aku tansah ngenteni kowe (MEks/JSet/5/Tanjung Mas Ninggal Janji)</i> - <i>Wis tak coba / Nglaliake / Jenengmu soko atiku / Sak tenane aku ora ngapusi / Isih tresno sliramu (MEks/JSet/6/Sewu Kuto)</i>	- The narrator assures his lover that his love is sincere and deep. - The narrator assures his lover of his loyalty and constant remembrance. - The narrator declares that his love and longing are only for her. - The narrator loses track of time while waiting for his lover for many years. - At Tanjung Mas Harbor, the narrator once saw his lover off, and he continues to wait there for her. - The narrator has tried to forget his lover, but his heart still longs for her.
6.	Expressing an attitude of resignation	- <i>Ngenteni sliramu / Neng kene tak tunggu / Nganti sak elingmu (MEks/SPsrh/1/Stasiun Tirtonadi)</i> - <i>Nganti kapan tak enteni sak tekane (MEks/SPsrh/2/Banyu Langit)</i> - <i>Umpamane kowe uwis mulyo / Lilo aku lilo / Yo mung siji dadi panyuwunku / Aku pengin ketemu / Senajan waktumu mung sedhela / Kanggo tombo kangen jroning dodo (MEks/SPsrh/3/Sewu Kuto)</i>	- The narrator will continue to wait for his lover until she remembers him. - The narrator will wait for his lover no matter how long it takes. - The narrator accepts his lover's absence but still hopes to see her, even if only for a moment, to ease his longing.
7.	Always remember the	- <i>Nalikane ing Tirtonadi / Ngenteni tekane bis wayah wengi / Tanganmu tak kanthi / Kowe ngucap janji / Lungo mesti bali</i>	- The narrator recalls waiting for the bus on the night of his lover's departure, when she

memories with your lover.	(MEks/Kengn/1/Stasiun Tirtonadi) - <i>Ning stasiun Balapan / Kuto Solo sing dadi kenangan / Kowe karo aku / Naliko ngeterke lungamu</i> (MEks/Kengn/2/Stasiun Balapan)	promised to return. - At the Solo Balapan Train Station, the narrator recalls seeing his lover off.

C. Sociocultural Dimensions in Expressions of Love

Didi Kempot's song lyrics not only articulate individual emotions but also embody profound sociocultural dimensions, particularly in their representation of *cidra* (Javanese for "broken promises") within romantic relationships. The sociocultural findings can be broadly categorized into three aspects: (1) gender (predominantly male narrators), (2) setting (notably *Stasiun Balapan*, *Stasiun Tirtonadi*, and *Pelabuhan Tanjung Mas*), and (3) attitudes of the characters represented in the songs. Male characters in Didi Kempot's lyrics are often portrayed as fragile and emotionally vulnerable, "crybabies" (easily moved to tears), yet simultaneously steadfast, empathetic, loyal, and deeply committed to keeping their promises. This representation reflects traditional Javanese values such as patience (*sabar*), protection (*ngayomi*), universal love (*nresnani marang sapodo-podo*), honesty, devotion, and responsibility.

For example, expressions of crying in public spaces such as train stations, which frequently occur in the lyrics, demonstrate the openness of male characters in expressing sadness. While this may contrast with Western stereotypes of masculinity, it is culturally acceptable and resonates strongly within the Javanese context.

"Ning Stasiun Balapan / Rasane koyo wong kelangan / Kowe ninggal aku / Ra kroso netes eluh ning pipiku." (MEks/PSdh/2/Stasiun Balapan)

("At the Balapan train station / It feels like someone who lost everything / You left me / Without realizing it, tears fell down my cheeks.")

This excerpt illustrates how specific settings evoke bitter memories, while also showing the courage of men who openly express sorrow. Similarly, waiting for years or traveling through *sewu kuto* (a thousand cities) in search of a lover reflects persistence, resilience, and patience, which are highly valued virtues in Javanese society.

"Sewu kuto uwis tak liwati / Sewu ati tak takoni / Nanging kabeh / Podo rangerteni / Lungamu neng endi." (MEks/PSdh/5/Sewu Kuto)

("I've passed through a thousand cities / I've asked a thousand hearts / But all of them / Do not know / Where you have gone.")

Geographical references such as "Nglanggeran," "Gunung Kidul," and "Yogyakarta" in *Banyu Langit*, or repeated mentions of stations and ports, further emphasize local nuances and ground the songs in authentic lived experiences. These cultural markers make the narratives feel deeply relatable to Javanese audiences. Thus, Didi Kempot's lyrics can be understood as both emotional expressions and cultural texts, rich in references that reinforce the meaning of "being in love" from a distinctly Javanese sociocultural perspective. More detailed contextual evidence and interpretations are presented in **Table 3**.

TABLE 3
SOCIOCULTURAL CONTEXT IN DIDI KEMPOT'S JAVANESE SONG LYRICS

Song Lyrics	Sociocultural Context	Interpretation
<i>Angin sing ngreridu ati / Pengen nangis / Ngetokke eluh neng pipi</i> (MEks/PSdh/1/Banyu Langit)	A man expresses the urge to cry.	The narrator feels sadness at night; the gentle breeze reminds him of his beloved and brings him to tears.
<i>Ning stasiun balapan / Rasane koyo wong kelangan / Kowe ninggal aku / Ra kroso netes eluh ning pipiku</i> (MEks/PSdh/2/Stasiun Balapan)	A man sheds tears.	At Balapan Train Station, the narrator feels abandoned, like someone who has lost everything, and sheds tears.
<i>Semana uga rasane atiku / Mung tansah nunggu tekamu / Ra krasa setaun kowe ninggal aku / Kangen, kangene atiku</i> (MEks/PSdh/3/Tanjung Mas Ninggal Janji)	A loyal man waiting for his lover for years.	The sadness of waiting endlessly; it does not feel like years have passed since the lover left.
<i>Sewo kuto uwis tak liwati / Sewu ati tak takoni / Nanging kabeh / Podo rangerteni / Lungamu neng endi</i> (MEks/PSdh/5/Sewu Kuto)	Life attitude: persistence; never giving up.	The narrator searches for his lover in many places, but the lover cannot be found.
<i>Mongso rendeng wis ganti ketigo / Opo kowe ra kroso?</i> (MEks/PSdh/6/Stasiun Tirtonadi)	A man patiently waits for his lover to come back through three seasons.	The narrator expresses endurance, waiting loyally even as the seasons change.
<i>Neng kene, neng kene, neng kene / Aku ngenteni kowe / Aku kangen</i> (MEks/PSdh/7/Stasiun Tirtonadi)	A man loyally waiting at his place of origin.	The narrator continues to wait despite being abandoned for a long time, expressing homesickness and loyalty.
<i>Sepine wengi iki / Neng kene aku ngenteni / Kesuwen-suwene wis pirang sasi / Neng Nickerie kowe ra bali</i> (MEks/PRind/2/Ning Nickerie)	A man continues waiting, though months have passed without his lover returning.	In loneliness, the narrator longs for his lover and hopes she will return soon.
<i>Pirang tahun anggonku nggoleki / Seprene durung biso nemoni</i> (MEks/PRind/4/Sewu Kuto)	Life attitude: caring.	The narrator has searched for years but still cannot meet his lover.
<i>Ngalem neng dadaku / Tambanono roso kangen neng atiku</i> (MEks/BPlg/1/Banyu Langit)	Setting: Banyu Langit, Nglanggeran Village, Gunung Kidul, Yogyakarta	The narrator hopes his lover will embrace him to cure his longing.
<i>Banyu langit / Sing ono nduwur kayangan / Watu gedhe / Kalingan mendunge udan / Telesono / Atine wong sing kasmaran</i> (MEks/BPlg/2/Banyu Langit)	Hope for rain to cool a heart filled with love.	These lyrics express a deep wish or prayer.

<i>Jare lungu mung sedelo / Malah tanpo kirim warto (MEks/BPlg/3/Stasiun Balapan)</i>	Life attitude: maintaining connection and loyalty.	The narrator hopes his lover will send news of her whereabouts, even briefly.
<i>Lali opo pancen nglali / Yen eling mbok enggal bali (MEks/BPlg/4/Stasiun Balapan)</i>	Life attitude: keeping promises, waiting.	The narrator hopes his lover will return soon if she still remembers him.
<i>Opo kowe ra kroso? / Yen kowe iseh seneng lan tresno / Kudune kowe kroso (MEks/BPlg/4/Stasiun Tirtonadi)</i>	Life attitude: sense of empathy.	The narrator reassures himself that his lover still loves him and hopes she remembers him.
<i>Tanganmu tak kanthi / Kowe ngucap janji / Lungo mesti bali (MEks/TJanji/1/Stasiun Tirtonadi)</i>	Life attitude: keeping promises.	The narrator reminds his lover of the promise made before leaving.
<i>Janji lungu mung sedelo / Jare sewulan ra ono / Pamitmu naliko semono / Ning Stasiun Balapan Solo (MEks/TJanji/2/Stasiun Balapan)</i>	Setting: Balapan Train Station.	At Solo Balapan Train Station, the lover promised that her departure would not last more than a month.
<i>Janjine lungane ra nganti suwe suwe / Pamit esuk lungane ra nganti sore / Janjine lungu ra nganti semene suwene (MEks/TJanji/3/Banyu Langit/)</i>	Life attitude: keeping promises.	The lover promised not to be away for too long.
<i>Aku sih kelingan nalika ing pelabuhan / Kowe janji lunga ra ana sewulan / Nanging saiki wes luwih ing janji / Nyatane kowe ora bali-bali (MEks/TJanji/4/Tanjung Mas Ninggal Janji)</i>	Setting: Harbor	At Tanjung Mas Harbor, the lover promised not to be gone for long (less than a month).
<i>Gedhene nggonku nresnani / Nganti kapan / Aku ora biso lali (MEks/JSet/3/Banyu Langit)</i>	Life attitude: loyalty.	The narrator's great love makes him unable to forget his lover.
<i>Aku kangen / Kanguku mung kanggo kowe (MEks/JSet/3/Stasiun Tirtonadi)</i>	Life attitude: loyalty.	The narrator's longing is only for his lover.
<i>Ning Pelabuhan Tanjung Mas kene / Biyen aku ngaterke kowe / Ning Pelabuhan Semarang kene / Aku tansah ngenteni kowe (MEks/JSet/5/Tanjung Mas Ninggal Janji)</i>	Setting: Tanjung Mas Harbor	At Tanjung Mas Harbor, the narrator once sent his lover off, and in the same place, he still waits.
<i>Wis tak coba / Nglaliake / Jenengmu soko atiku / Sak tenane aku ora ngapusi / Isih tresno sliramu (MEks/JSet/6/Sewu Kut)</i>	Life attitude: honesty.	The narrator has tried to forget his lover, but still truly loves her.
<i>Ngenteni sliramu / Neng kene tak tunggu / Nganti sak elingmu (MEks/SPsrh/1/Stasiun Tirtonadi)</i>	Life attitude: loyalty.	The narrator will keep waiting indefinitely until the lover chooses to return.
<i>Umpamane kowe uwis mulyo / Lilo aku lilo / Yo mung siji dadi panyuwunku / Aku pengin ketemu / Senajan waktumu mung sedhela / Kanggo tomo kangen jroning dodo (MEks/SPsrh/3/Sewu Kuto)</i>	Attitude to life: resignation.	The narrator accepts that his lover may not return but hopes to meet even briefly to ease his longing.
<i>Nalikane ing Tirtonadi / Ngenteni tekane bis wayah wengi / Tanganmu tak kanthi / Kowe ngucap janji / Lungo mesti bali (MEks/Kengn/1/Stasiun Tirtonadi)</i>	Setting: Tirtonadi Bus Station	The narrator recalls memories of waiting for the bus on the night of departure and the promise of return.
<i>Ning stasiun Balapan / Kuto Solo sing dadi kenangan / Kowe karo aku / Naliko ngeterke lungamu (MEks/Kengn/2/Stasiun Balapan)</i>	Setting: Balapan Train Station	At Solo Balapan Train Station, the narrator recalls the memory of accompanying his lover's departure.

IV. DISCUSSION

Through sociocultural linguistic analysis, this study investigated the lyrical expressions of love and longing (*kasmaran*) in Didi Kempot's Javanese songs. The findings revealed nine specific forms of *kasmaran* expressions and seven pragmatic meanings, all closely intertwined with the Javanese sociocultural context. This discussion interprets these findings by connecting them to previous literature, outlining implications, highlighting novelties, and proposing future research directions.

One key finding is the diversity of *kasmaran* expressions that extend beyond explicit declarations of love. The rarity of direct expressions such as *tresna* and their substitution with symbolic acts such as waiting, longing, and loyalty reflect Javanese cultural values emphasizing feeling, politeness (*unggah-ungguh*), and indirect communication. This finding aligns with Wierzbicka's (1999) argument that culture and language strongly shape emotional expressions, which are not always conveyed directly. In collectivist cultural contexts such as Java, avoiding explicit verbal expressions often serves to maintain social harmony and interpersonal relations (Arndt & Janney, 1985; Mongrain & Vette, 2003; Morris & Keltner, 2000; Ting-Toomey, 1994).

Furthermore, these findings confirm that language is not neutral but embodies cultural values inherent in the communities where it is used (Halliday, 1978). As Kecskes (2014, 2021, 2023) notes, lexical choices reflect cultural perspectives on the affective world. In this case, the concept of *kasmaran* is subtly mediated through pragmatic structures embodying Javanese politeness and spirituality norms. Lyrics such as "*Kanggo tomo kangen jroning dodo*" ("To be a cure for the longing inside my heart") convey deep affection through empathetic and melancholic aesthetics, consistent with the characteristics of poetic pragmatics in song lyrics (Sternberg, 1991; Warner, 2023).

The analysis of pragmatic meaning also uncovers a distinctive narrative persona in Didi Kempot's lyrics; one that is loyal, emotionally vulnerable, and reflective. This challenges universalistic notions of hegemonic masculinity (Jefferson, 2008; Messerschmidt, 2019; Morrell et al., 2012) and supports the view that masculinity is contextual and negotiable through cultural practices. In this context, the portrayal of the "whiny but loyal" Javanese man has emerged as an accepted masculine ideal, as reflected in subcultures such as "*Sadbois*" and "*Sobat Ambyar*" (Mantara, 2022). This supports Foucault's (2025) claim that identity is not fixed but discursively constructed in cultural spaces such as popular music.

Lyrics like “*Sewu kuto uwis tak liwati*” (“I’ve passed through a thousand cities”) highlight the aesthetic value of hyperbole and metaphor, deepening their affective resonance. These metaphors bridge personal experiences and collective meaning, as explained in conceptual metaphor theory (Lakoff & Johnson, 2020), where emotions are constructed through spatial, temporal, and movement-based imagery.

The theme of *cidra* (broken promise) also holds profound sociocultural significance. In Javanese culture, *cidra* is both an emotional betrayal and a violation of ethical and spiritual norms in social relations. Didi Kempot’s lyrics consistently depict *cidra* as an emotional and moral wound, underscoring the importance of honesty and loyalty in traditional Javanese society (Andriyanto et al., 2022). This illustrates how popular music reflects cultural values and functions as a discursive arena where social norms are renegotiated (Gross & Vostroknutov, 2022).

The novelty of this study lies in the systematic identification and mapping of nine forms and seven meanings of *kasmaran* through a holistic sociocultural linguistic approach. While previous research has largely focused on musical or sociological aspects (Putro et al., 2025; Sutopo, 2022), this study contributes conceptually by demonstrating how lexical choices, syntactic structures, and pragmatic strategies concurrently construct cultural emotions. It further enriches cultural linguistics theory (Sharifian, 2017), emphasizing that language is inseparable from its speaking communities’ belief systems and values.

Theoretically, these findings reinforce the view that emotional expression in language is a form of cultural representation codified through linguistic and pragmatic structures (Travis & Cacoullos, 2020; Verschueren, 2009). Methodologically, the sociocultural linguistic analysis model developed in the present study can be replicated in cross-cultural research to examine how affect is linguistically constructed across diverse cultural contexts.

From a practical and sociocultural perspective, this study highlights music as a medium for transmitting social values and cultural identity. Didi Kempot’s “*Sadbois*” persona reflects shifting emotional and gender norms, opening new opportunities for research on contemporary masculinity in Southeast Asia. This is relevant not only for scholars but also for artists, educators, and policymakers seeking to understand the role of popular culture in shaping values and social reflection (Fiske, 2010).

Nonetheless, this study has several limitations. *First*, its corpus is limited to seven representative songs, which may not capture the full spectrum of *kasmaran* in Didi Kempot’s oeuvre. *Second*, the exclusive focus on lyrics as written texts overlooks performative elements such as melody, prosody, and visual expression in live performances (Frith & Kitzinger, 1998). *Third*, the absence of audience reception analysis excludes emic perspectives on meaning-making (Vase et al., 2012). Future research should therefore incorporate multimodal approaches, broaden the corpus, and employ reception studies to capture listeners’ lived experiences, including cross-cultural comparisons of emotional articulations in music.

V. CONCLUSION

This research has demonstrated how Didi Kempot’s songs uniquely articulate and reflect lyrical expressions of love and longing (*kasmaran*) within a Javanese cultural context. Through a sociocultural linguistic analysis, the researchers identified nine distinct forms of *kasmaran* expression, ranging from love, waiting, and longing, to loyalty, which are frequently conveyed indirectly rather than explicitly. This pattern underscores the Javanese cultural preference for nuanced and implicit emotional expression. Furthermore, a pragmatic analysis revealed seven primary meanings of these expressions, spanning an emotional spectrum from profound sadness to resignation. These findings highlight the complex persona of the narrator: a man who, despite his vulnerability and melancholy, remains steadfast in loyalty and commitment. This representation, which contrasts with certain stereotypes of masculinity widely associated with the “*Sadbois*” and “*Sobat Ambyar*” phenomena, illustrates how Didi Kempot’s lyrics negotiate and reflect contemporary social norms and emotional identities. From a sociocultural perspective, the lyrics are imbued with cultural meanings, particularly the concept of *cidra* (broken promises) and the use of specific settings as emotional markers. The novelty of this research lies in its systematic mapping of the forms and meanings of *kasmaran* expressions linguistically and socioculturally, thereby filling a gap in the literature, which has tended to focus more on musical aspects or general sociological impacts. In short, this study affirms that Didi Kempot’s songs constitute a rich medium that extends beyond entertainment, serving to reflect and construct Javanese cultural values in the expression of affection. The implications include theoretical contributions to cultural linguistics and practical relevance for understanding popular culture as a vehicle for transmitting values. Despite its limited corpus and textual focus, this study opens pathways for future multimodal and audience reception research to further enrich our understanding of the complex interplay between language, emotion, and identity in art.

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The Hegemony of Politics and Ideology in Saul Bellow: Contradictions, Philosophical Influences, and the Struggle Between Humanism and Modernity

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Abstract—This paper discusses the hegemony of politics and ideology in Saul Bellow's writings. It further examines the ideological and philosophical inconsistencies in Bellow's writings, focusing on the interplay between politics, humanism, and the hegemonic forces of modernity. This study, drawing on a theoretical framework that integrates Kantian ethics, Hegelian dialectics, Marxist class struggle, and Foucauldian power structures, explores how Bellow upholds the philosophical traditions that reveal the fundamental contradictions in his worldview. His writings simultaneously reinforce aspects of the very systems, creating a paradoxical stance on modernity proving critique on capitalism, materialism, and totalitarian ideologies. Through the findings and an analysis of *Humboldt's Gift*, *Mr. Sammler's Planet*, and *Herzog*, this study highlights how Bellow's portrayal of Jewish identity, the Arab Israeli conflict, and Western intellectual traditions reflects an unresolved tension between his literary aspirations and philosophical influences. Moreover, the findings suggested that Bellow, despite his attempts at subversion and critique, remained deeply entrenched in the ideological structures he wanted to challenge. His shifting perspectives—ranging from a critique of Western hegemony to an implicit reinforcement of its values—reflect the broader struggles of 20th-century thought, where the search for moral and political clarity often gives way to ambivalence. Finally, the researcher concludes that, in Bellow's writings, the contradictions are not merely personal but emblematic of the inherent tensions within Western modernity and its philosophical traditions.

Index Terms—politics, ideology, inconsistency, subversion, hegemony

I. INTRODUCTION

Bellow's writings have attracted a large number of critics, and their critical attention has established him as one of the great humanists due to his attachment to community, human nature, and the ameliorative prospects that lie within man's physical grasp (Glenday & Glenday, 1990). Moreover, he provides many instances of inconsistencies in his writings, both semantically and stylistically. In fact, the author attacked certain capitalistic and materialistic practices and values such as materialism versus humanism, capitalism versus socialism, technology versus art, war, science, mass media, identity, victimization versus victimizers (Marrouchi et al., 2020; Siddique et al., 2020; Teymouri et al., 2018) without being able to free himself fully and unconditionally from the hegemonic powers of modernity, that is, the negative aspects of modernity. He, therefore, presents a model of thinking in a state of crisis, where one cannot establish an objective world without completely shielding oneself from all co-opting encroachment by the modern system of life (Ravinthiran, 2016; Ahonen, 2022).

In *Humboldt's Gift*, Charles Citrine, the philosopher, crystallizes his sublime ends as follows:

And money wasn't what I had in mind. Oh God, no, what I wanted was to do good. I was dying to do something good. And this feeling for good went back to my early and peculiar sense of existence—sunk in the glassy depths of life and groping, thrillingly and desperately, for sense, a person keenly aware of painted veils, of Maya, of domes and many colored glass staining the white radiance of eternity. (Bellow, 1975, p. 9)

These Platonic intentions are strikingly contrasted by 'the melancholy of affluence' and the madness of materialism and capitalism. This begins when Humboldt acknowledges the hegemony of money over his idealistic views on poetry at the novel's outset. The paradox becomes more acute when we learn about the poet's readiness to exchange his poetic reflections on Yeats, Blake, and Wordsworth, as well as his intellectual debates on history and postmodern Western societies, for wealth (Glenday & Glenday, 1990). Citrine, on his part, contradicts himself twice: first, when he admits that he dies to do good for sublime ends, while in practice he strives 'to buy his fame by his frequent referring Humboldt.' Second, he portrays his life as one filled with sexual adventures, deals, journeys, business, and excitement, which contradicts his ultimate ideals regarding knowledge, poetry, and philosophy (Bellow, 1975). Unlike Citrine and Cantabile, Humboldt was not able to achieve affluence. While in his philosophical and poetical meditations, Citrine professed that humanism is an unconditional feeling; in practice, he could not retreat from the world of business and

money. What is even more ironic is that the author sought to structure the novel around striking paradoxes between intellectuals and ordinary people, thieves and nobles, Men of letters and Men of business, kind men and cruel women. Such an inconsistent gesture leaves no doubt that Saul Bellow was 'anything but a firm believer in what he wrote.' This desire to conceal the true faces of his subjects and the techniques of creating a whole world from acute paradoxes contradicts the author's ideals of humanism, evoking the status of Western capitalist culture, which is deeply rooted in contradictions. Although Bellow's tone was highly assertive to the very extent that one can feel the intensity of morality and humanism, he was far from that 'humanist hero' he strived to emphasize in his writings (Assadi, 2014). If one may account for these inconsistencies by admitting the author's consciousness of history and his intellectual maturity, it is always unconvincing as a reason for his deliberate and ceaseless moments of inconsistencies.

One objection that might be raised is that the writer is not the speaker in his novels and essays and that he was merely imagining a better world through his fictional subjects. However, one should not forget that the writer has been publicly asserting his writing to be a direct reflection of his beliefs; otherwise, his project of deconstructing the amorality of the postmodern age and his strategies of subversion and satire would have no meaning whatsoever. Additionally, the purpose behind comparing his theoretical ideals to his attitudes in reality is not meant by any means to downgrade him or even to criticize him, but to epitomize the fundamental moments of weaknesses in his thought in the first place, and 'to show how a western culture/subjectivity, no matter how consistent it claims to be, always ends up falling into contradiction'.

In his doctoral dissertation *American Holocaust Novels*, Chanen (1987) portrays Bellow as a humanist figure who spent his lifetime advocating for humanist causes. Referring to the opinions of historians, theologians, Holocaust theorists, literary critics, eyewitness documents and diaries, intellectuals, soldiers, ordinary people, and Men of letters, the writer has strived to introduce the Jews as the victims of twentieth-century atrocities. Chanen (1987) attempts to provide a reading of the author's vision of life, humanism, peace, war, sacrifice, and Jewishness; he does not raise suspicious questions about how these visions could not be as uniform as they were made to seem. Even when he registers a moment of inconsistency, he assumes to consider it the 'growth' of the mind of the author and never conceives it as a radical change in his thoughts. Personally, Bellow's might be seen as contradicting himself at three fundamental moments. First, when he published his *Mr. Sammler's Planet* (1970) and before it *Dangling Man*, one can easily notice his contradictory attitudes towards the concept of the war (Chanen, 1987). In fact, while Joseph in *Dangling Man* valorizes war as the only means to achieve the independence of the Jews, Dr. Elya downgrades it as it only leads to the end of the world and the deconstruction of man (Best, 2021). Second, one can mention the author's ambivalent attitudes towards the Arab Israeli conflict, which were firmly conveyed in his autobiographical work, *To Jerusalem and Back*. In line with this, his political and moral ideals contradict his beliefs in freedom and dignity. He considers the Arabs as devils threatening the future of the newly emerging Jewish state. To his mind, they were invaders, terrorists, savages, ignorant and barbaric people. His Jewish assumptions further aggravated this ambivalence by the way he dramatized the Holocaust in *Ravelstein* and *The Bellarosa Connection* (Best, 2021; Cronin & Trepanier, 2013). Strikingly enough, while the writer depicts the Jews as victims of Nazism, wars, he unexpectedly ignores the right of the Palestinians to live in their land. Eventually, one can admit that the writer consistently contradicted himself from the beginning of his career to his death. This is evident in the way he introduced capitalism and socialism in his early writings. When Tommy Wilhelm and Augie March strongly criticized the unjust system of capitalism, when Henderson, Mosby, and Sammler envisioned the savage face of the Western civilization, and when Herzog overemphasized the spiritual loss of the Western culture, Bellow remained faithful to the totalitarian and dogmatic ends of modernity. A first glance at his writings might induce the author's ceaseless attempts to subvert the heritage of Western ideals, but a profound exegesis of the rhetoric and logic of his texts reveals an immense sense of ambivalence in his political, social, and philosophical attitudes (Gold, 1979; Best, 2021).

What changed in the mind of the author were not his basic views of life, which revolved around ambivalence and deconstruction, but the perspectives, the interests, and the contexts that decisively trigger off his attitudes. On this say, the researchers such as Hojjati (2008) and Eichelberger (1999) believed that the writer has been contradicting himself from the beginning of his career till his death for how could a writer who had rebelled so much against barbarism, especially the wars of the twentieth century, hegemony, unjust causes, madness, totalitarian regimes, dogma [...], fail to abide by the very principles of humanism he preached for? Can this be regarded as a moment of inconsistency that features a huge gap between Bellow's theoretical and utopian ideals and his practices in life? More satirically, is this a mark that signals the failure of the totalitarian projects of modernity and enlightenment? And again, is this a gesture that epitomizes the author's failure to represent the American dream? Can it be regarded as a perfect example that envisions Bellow's misunderstanding of the dogmatic and hegemonic ideals of modernity? Or is it a logical result of the writer's failure to translate his human and moral beliefs into practice? If a reading to the author's strategies of subversion could not prove these inconsistent instances, then the insights of modernity, postmodernity and after postmodernity can clearly show how the Western model has always relied on this contradictory strategy: to idealize values and then to push the individual to transgress the very principles that have shaped his life (Hojjati, 2008).

There are many other questions that could be asked about Bellow's political position. For example, why is it that a novelist who spent his lifetime writing against socialism, refusing its political, economic, and cultural systems (which are heavily regarded as a threat to capitalism and liberalism), is now changing his attitudes by launching a radical

critique of his early beliefs? In this sense, when the writer published his early novels in the 1950s and 1960s, he strongly criticized the hegemony of communism, as he was asked to lecture and present his political and philosophical views to students at universities in Jerusalem, North America, and Europe. He demonstrated careful reading in the archaeological and genealogical design, as cited by Foucault, which structures modernity (Gustafson, 2014; Cronin & Trepanier, 2013). Supporting the concepts of morality, justice, freedom, and law, he strikingly asserted that this project of modernity is an unfinished process of enlightenment. In doing so, Bellow 'disdainfully' downgrades the dogma and the unfair system of capitalism. This fact could be easily traced in the intellectual and philosophical debates generated by *Herzog* and *Ravelstein*. The author's essays, short stories, and autobiographical writings showed how the writer agreed to play the game that he had previously condemned (Hojjati, 2008; Assadi, 2014).

So far, while tracing Bellow's contradictory and irreconcilable positions regarding several political, cultural, and philosophical concerns. It can be safely acknowledged that he has been found to alter his beliefs and behaviors as if he had never been committed to a philosopher. To this, it can also be argued that he failed to engage critically with the major political issues. What remains to be stressed is that the author was never conscious of all that because he was himself the victim of the power of his silent Jewish assumptions, as well as the system in which he was born and reared up. Interestingly, his excessive faith in individualism, freedom, morality, justice, and humanism ultimately failed to provide him with a clear political, social, cultural, and philosophical framework (Gustafson & Azmi, 2019). Bellow was not the child of his age to quote Hegel, but rather its victim. The rebellious/subversive nature of his mind devoid all his efforts of criticism of any serious result. Accordingly, one logical conclusion one might draw is that the author was unable to provide a deep and coherent insight into the main issues posed in his time. Another general conclusion is that the writer's deconstructive reading of twentieth-century political issues in specific and the Western habits of thought in general cannot escape the act of criticism itself (Gustafson & Azmi, 2020; Allman, 2020; Viscuso, 2024).

Pointing out these inconsistent standpoints is quite fundamental in the reevaluation of the subversive strategies of a writer who has been very scrupulous in condemning the norms of both modernity and postmodernity simultaneously. In the next part of this study, it will be demonstrated how the hegemony of ideology played a significant role in shaping the author's inconsistent moves.

II. THE HEGEMONY OF IDEOLOGY

How did the hegemony of ideology overemphasize Saul Bellow's inconsistent moves? At this stage, the objective is to ensure that Bellow was under ceaseless kinds of pressures and powers (Snedeker, 2023). In other words, various 'ideologies' qualified the way the author perceived life and the world. Accordingly, they can be categorized as follows:

(a) The ideology of politics and the author's blind reflections on Western ethics. This fundamentally includes the Jewish cause.

(b) The ideology of the Jewish culture and tradition. This would clearly overemphasize the extent to which the Jewish assumptions affected the author's views.

(c) The ideology of the various philosophical trends of thought. Although the writer has strived to exploit certain philosophical insights and, more than this, develop a theory of writing that crosses the borders between discourses, he was entrapped by these theories. He could not act outside the heavy influence of philosophy; that is, he could not establish a critical distance between his ultimate ends and the findings of philosophy he was using. Bellow was essentially under the influence of Kant's theory of morality, Hegel's notion of the absolute unity, Marx's theory of the structure of history and the conflicts between classes, Foucault's assumptions of power, archeology and genealogy, Derrida's deconstruction, Habermas (1990) and Adorno's views of the dialectical function of modernity/the enlightenment, Bauman and Davis's after postmodernity which is generally referred to as after theory (Davis, 2004, pp. 152-177). In short, philosophy functions as a means that triggers the author's critical thinking as well as a sort of power that cripples liberty (Ogunmekan, 2024; Marrouchi et al., 2020).

As has been ceaselessly argued, politics dominated the writer's fictional world and introduced highly debatable issues in his writings. Interestingly, whenever Bellow was accused of inconsistency, subjectivity, and haziness, this accusation could be easily attributed to the influence of the hegemony of certain political views (Marrouchi et al., 2020). For instance, the imperialistic politics of the Western powers, the strategies of wars, the theory of expansion, and the feeling of the legitimacy of taking over others' land contradict the author's beliefs in morality and humanism. When he published his *Dangling Man* and *The Victim*, one can remarkably notice the Jewish imperialistic assumptions of expansion and war, which were highly reiterated in his autobiographical journey to Jerusalem. The writer's pronouncements of morality and humanism in *Mr. Sammler's Planet* contradict his early beliefs. Sammler's sharp criticism of modernity and the wars of the twentieth century may not accurately reflect the author's true intentions. More satirically, it makes these ethical and moral concepts merely ruling illusions (Pifer, 1991; Ravinthiran, 2016; Watson, 2013; Turner, 2023). Accordingly, one can only wonder if this represents one aspect of the hegemony of politics on Bellow's part. Is he not moralizing and rejecting morality at the same time? Is it clear that the author's views on politics and morality underwent considerable changes in the course of his intellectual career? Is it fair enough to illustrate Bellow's view on morality, politics, and ideology to that of Karl Marx? It is tempting to see this change of attitude as a move on the author's part from an initial endorsement of a distinctive ethical position to a subsequent rejection of these attitudes.

Obviously, one cannot gain an insight into these pronouncements without seeing the deep influence of Kant's moral theory on the author. The moment of showing the hegemony of politics symmetrically begins with Hegel's critique of Kant's morality. When Hegel endorses the abstractness, lofty outlook, and empty formalism of Kant's moral theory, Saul Bellow expresses it in his critical reflections on the imperial behaviors of the twentieth-century empires. The totalitarian concepts of morality and happiness that overwhelmed his subjects generated a feeling of the superiority of the Western culture and civilization in general and the Jewish community in specific. Henderson, Humboldt, Sammler, and Herzog overemphasized the way the moral duty of bringing some change to the world led to exile and marginalization. Tommy Wilhelm and Augie March are portrayed as victims of the hegemonic forces of capitalism. They ceaselessly showed never-ending tragic failures in society (Assadi, 2014). Joseph and Asa Leventhal represent the failure of the dogma of morality and justice in the modern era. Joseph confirms the unjust and totalitarian system of politics that kept him dangling and waiting for his part to go to the war. However, Asa Leventhal laments being a victim of his own amorality and his failure to take responsibility for others. Below, in parallel with this, he did not attempt to develop a new concept of morality that shifts from the abstractness, loftiness, and totalitarianism of Kant to the reality of Marx, thereby showing his inability to escape the political implications of these principles. The writer, to my mind, could not profess Marx's historical criticism or even be aware of his view. When he focused on morality and humanism, he forgot to address the issue of class conflicts, the imperialistic and materialistic consequences of capitalism (Glenday & Glenday, 1990). In short, assuming that the author deliberately neglected the assumptions, the implications, and the details of the theory of morality that he was trying to establish, he was not able to avoid being the victim of its politics.

Another moment of hegemony on Bellow's mind should be read in the authority of certain philosophical theories during his intellectual career. This, as I would argue, includes:

- (a) The impostures of the Enlightenment ideals.
- (b) The problem of knowledge.
- (c) The specters of theory or what Davis (2004) would call after theory.
- (d) The writer's lack of awareness of the dividing lines between these theories and concepts.

In fact, although the author related his moral theory, especially in his early writings, to the ideals of the Enlightenment and attempted thereby to apply its findings, one can still acknowledge that this gesture played a totalitarian role in the formation and development of the writer's views. These norms were bound up with the mythology they claimed to repudiate; their appeal to reason, to quote from Adorno and Horkheimer, is racist and imperialist. The project of the Enlightenment which sought to "develop objective science, universal morality, autonomous art according to its logic" (Davis, 2004, pp. 35-37) is now taking the wrong path, while these efforts to mark the separation between the contemporary world from the Middle Ages and antiquity are regarded as the last stages in history. In tune with this, Bellow defines these themes as the fundamental focus of his writings. He addressed topics such as justice, morality, humanism, reason, happiness, and religion in his early writings. During the 1970s and 1980s, he was commonly regarded as a writer of morality and humanism in the US, as he strove hard to defend the rights of individuals as well as communities. Being affected by the power of the Enlightenment norms, the author initially attempted to improve the conditions of everyday life (Gold, 1979). Nevertheless, he was unable to escape his dogma and totalitarianism, and thus diminished the importance of the present, impairing the original critical impetus of using reason.

Strikingly enough, this hegemony could be further justified through the ethics of postmodern philosophers and theorists. Accordingly, the writer was remarkably influenced by the findings of certain philosophers like Nietzsche, Derrida, and Foucault (Ravinthiran, 2016). He was "aware that while modernity promised progress and emancipation, yet it signaled the downing of postmodernity, which denies the progress in morality or knowledge and promises only discord and the struggle for dominance." Habermas (1990) explains this disastrous shift as follows:

The skeptical scholar who wants to unmask the perversion of the will to power, the revolt of reactionary forces, and the emergence of subject centered-reason by using anthropological, psychological and historical methods has successors in Bataille, Lacan, and Foucault; the initiate-critic of metaphysics who pretends to a unique kind of knowledge and pursues the rise of the philosophy of the subject back to its pre-Socratic beginnings has successors in Heidegger and Derrida. (Habermas, 1990, p. 97)

Analyzing in detail the erroneous paths taken by the assailants of the Enlightenment such as Derrida, Foucault, Bataille, Adorno, and Horkheimer, one can easily remark that Bellow's late writings are heavily enriched by their insights (Davis, 2004). Herzog, for example, raises the crisis of knowledge and existence, philosophy and literature, history and storytelling, and the Jews and the world, suggesting thereby a huge discrepancy between the hero, Herzog, the skeptical scholar, and the initial promises of emancipation generated by the Enlightenment. Sammler showed the failure of the 'grand narratives' of reason and morality by focusing on the atrocities of the 20th century. Ravelstein and Humboldt appear to be poor readers of the history of the Jews and the intellectual trajectory of philosophy and poetry. They repeat some of the failings of which the author was accused: misreading the ethics of modernity, generalizing from limited evidence, exploiting ideas/issues out of context, and making dogmatic and subjective assertions rather than reasoned arguments. More importantly, if all these subjects have proven to be poor readers to the major social, political and intellectual problems of the age, Bellow himself might be seen as a poor reader to the post Enlightenment habits of thinking "[...] and the similarities here look too consistent to be merely a product of change" (Davis, 2004, p. 20). The

picture shows the author to be denouncing his early beliefs and epitomizes the politics of postmodernity to be playing a key role in reshaping his thinking. In both cases, one cannot deny the power of 'the ideology' of both the Enlightenment and the post-Enlightenment norms on the writer.

In his *The Illusions of Postmodernity*, Eagleton (2013) envisages the hegemony of the suspicious thought of postmodernity in the following way:

Postmodernity is a style of thought which is suspicious of classical notions of truth, reason, identity and objectivity, of the idea of universal progress or emancipation, of single frameworks, grand narratives and ultimate grounds of explanation. Against these Enlightenment norms, it sees the world as contingent, ungrounded, diverse, unstable, indeterminate, a set of disunified cultures or interpretations which breed a degree of skepticism about the objectivity of truth, history and norms, the givenness of natures and the coherence of identities [...] Postmodernism is a style of culture which reflects something of this epochal change, in a depthless, decentered, ungrounded, self-reflexive, playful, derivative, eclectic, pluralistic art which blurs the boundaries between 'high' and 'popular' culture, as well as between art and every day experience. (Eagleton, 2013, p. vii)

In Bellow's context, terms such as identity, knowledge, storytelling, history, culture, and boundaries are already problematic issues. Being highly influenced by these illusive concepts, the author's subjects concede that they are combating things that never existed. Having fallen in madness and purposelessness, Herzog, Sammler, Henderson, Humboldt, reproduce the void of the age, the deconstruction of values, the peculiar dilemma of reason and truth, the cultural conflicts and the problem of identity in literary terms (Bigler, 1995, p. 22). The working hypothesis is that the author was unconsciously influenced by this suspicious style of thought, which not only traces the status of knowledge at this era but also marks the end of [West]'s reconstruction (Lyotard, 2004, p. 11). This is coupled with Lyotard's awareness of the crisis of science and, more tragically, the crisis of any solid ground of scientific theory. He asserts:

By concerning itself with undecidables, the limits of precise control, quanta, conflicts caused by incomplete information, 'fracta', catastrophes, pragmatic paradoxes, postmodern science theorizes its own evolution as discontinuous, catastrophic, non-rectifiable, paradoxical. It changes the meaning of the world knowledge, and it explains how this change can take place. It produces not the known, but the unknown. And it suggests a model of legitimation which is absolutely not that of the best performance, but that of difference understood as paralogy. (Lyotard, 2004, p. 97)

Also, differently put in Levinas's (1979) way:

End of humanism, of metaphysics-death of man, ... Apocalyptic ideas or slogans of intellectual high society. Like all demonstrations of Parisian taste- or distaste- these words are imposed with the tyranny of the latest fashion, but they are made affordable to all and degraded. (Levinas, 1979, p. 95)

"The limits of control, quanta, conflicts caused by incomplete information, paradoxes, catastrophes, [reproducing] the unknown," to cite Lyotard and "End of humanism and apocalism," to recall Lévinas sketch the crisis of theory or let me call it the theory of the absolute and the unknown. Bellow's intellectual career is heavily marked by moments of skepticism and a lack of solid theoretical ground, both at the levels of storytelling and meaning. He does not adopt a clear and simple strategy of telling stories. His "characters are enclosed beings, prisoners. Their story is never finished, it is still going on, but it does not advance" (Levinas, 1979, pp. 140-41). The heroes in the Bellowian fictional world move in a world of dogma, darkness, and uncertainty. They turn out to be mad intellectuals and all of a sudden become wise fools, romantic poets, hopeless philosophers, mischievous politicians, ordinary people, victorious businessmen, brave men, and eventually storytellers of imaginary stories. The kind of literature, novels, essays, poems or plays that the author was exposed to, is conveyed the tyranny and the barbarity of the Western methods of thinking. Thematization, or the said/the meaning, to cite Levinas (1979) again, revolved around existentialism, absurdity, romanticism, deconstruction, and idealism, thereby preventing any possibility of certainty. The saying or the techniques of telling the stories blurred the boundaries between discourses and made it difficult to unsay what Bellow really wanted to approach 'the ethical relation with the other'.

More strikingly, the ordinary concept of plot is rejected in Bellow's stories as it overtones the hegemony of the said/the meaning over the saying/representation. The way Davis (2004) interprets Lévinas's textual practice triggers off an interesting parallel with the way Bellow develops his storytelling. Davis's insight, though long, is worth being quoted in full:

[...] The subject is described as accused, persecuted, obsessed by the Other, as a sacrifice or hostage who must substitute for the Other and expiate for his crimes. Therefore, the text appears as if it gathers together the shards of an untold story involving violence and distress, and which it insists cannot be reconstructed. The whole chapter has the quality of a commentary on a novel we have not read, and we can only try to work out its plot on the basis of the clues in front of us. The story is untellable, as it falls 'short of all memory, all recall,' it cannot be 'converted to memory,' it occurs outside 'any memorable past' (165), it is located only in an 'Anteriority anterior to any representable anteriority' (195). Whilst the repeated use of the word plot suggests the possibility of telling the story, Levinas ensures that it is also untellable. No memory or narrative could reconstruct this story, and even the words which might evoke it evaporate or collapse into one another as we look at them. In Eagleton's account, 'dazzlingly, "substitution" becomes "one- for- the- other" becomes

“hostage” becomes “sacrifice” becomes “exposure” becomes “passivity beyond passivity” becomes “proximity” becomes “trauma” becomes “here I am” (Eagleton, 1997, p. 139). In the simultaneous refusal of storytelling and the shattered legibility of an untold story, it is possible to see one of the key stakes of Lévinas’s ethics: the problem of how to translate the unconditional responsibility for the Other into our lives. The examples which might link my responsibility to my actions, my saying to my said, are precisely missing or unrecognizable. Stories are withheld or dispersed and fragmented precisely because to answer the question “What does this mean?” would betray or falsify the meaning it should have. (Davis, 2004, pp. 98-99)

Bellow shows striking affinities with Davis’s ultimate findings on Levinas: the problem of plot, the persecuted characters, the sphere of void and darkness, the crisis of any ethical communication with the other, ‘untold, and unfinished if told, stories,’ the lack of a solid ground of knowledge and certainty, the issue of memory and representation [...]. Most probably, the author’s initial aim was to outline the fundamental moral and ethical norms of the Enlightenment in his writings. Unexpectedly, he took the wrong path- under the influence of the post-Enlightenment theorists- by endorsing the crisis of reason, truth, morality, freedom, and progress. As Habermas (1990) put it, “[his writings hope to recall that of other post-Enlightenment thinkers who] pursued the goal of enlightening the Enlightenment about its narrow-mindedness” (Habermas, 1990, p. 302). This involves revising the absolute notions of pure reason and morality in favor of communicative reason and amorality. This, indeed, can only epitomize the writer struggling against the hegemony of never-ending philosophical theories, attempting to ground meaning, making sense in his narratives and destabilizing it, which becomes the central issue of his thought until his death in 2005.

Additionally, Bellow makes no genuine efforts, despite his attempts at subversion and deconstruction, to understand the post-Enlightenment theorists and exploit their findings (Reed, 2023). The discovery of the inconsistencies inherent in their logic “inhibits, or serves as an excuse to ignore, any presumption that they may contain anything worth saying” (Davis, 2004, p. 27). Moreover, Bellow repeatedly draws hasty and general conclusions about the philosophers he discusses. In *Herzog* (1964), he suggests that Hegel and Heidegger did not understand human nature, that Karl Marx could not take the project of justice and equality between classes further. In *Mr. Sammler’s Planet*, *Ravelstein* and *Humboldt’s Gift*, the politicians of the 20th century, the famous poets, and the philosophers of morality, according to him, were not able to improve humanism and bring some change to the world. These suggestions are made on the basis of the writer’s lack of understanding of the Enlightenment itself; the misuse of certain theories and ideas lifted out their context, without taking any consideration to the intellectual context within which it should be used. Broadly speaking, the author, one can say, was not aware of the details of the philosophies and theories of the age, a gesture that can only epitomize “[...] a strange lesson in reading [art and the world], contesting every detail in [the world] without suggesting for one moment that one has seen its overall project, that is quite simply, its meaning” (Barthes, 1967, p. 42).

III. CONCLUSION

In short, this study has examined the complex interplay of politics, ideology, and humanism in Bellow’s writings. However, the findings suggest that the fundamental weaknesses of Saul Bellow in this respect are, in fact, the weaknesses of the Enlightenment itself, as they reveal the ideological contradictions embedded within his works. Despite his critique of capitalism, materialism, and totalitarian ideologies, Bellow’s narratives often paradoxically uphold the very systems he sought to challenge. Therefore, by endeavoring to address the issues raised by the Enlightenment (justice, freedom, morality, knowledge, ethics), he unexpectedly fell under the hegemony of misunderstanding his own way. His philosophical engagement with modernity, viewed through the lens of Jewish identity, the Arab-Israeli conflict, and Western intellectual traditions, highlights a tension between his literary aspirations and the hegemonic forces of his time. He could not resist the influence of other theorists and philosophers, partly because he misunderstood them and partly because they had a remarkably blind influence on the intellectual context around him. The author’s view of the concept of madness and his strategies of attacks against modernity, subversion and deconstruction further aggravated the matter. Moreover, the study suggests that Bellow’s works reflect a broader struggle within 20th-century thought, where attempts to critique Western hegemony frequently collapse into ambivalence, reinforcing the very values they seek to question. Ultimately, the contradictions in his writings reflect the inherent tensions within Western modernity, offering a profound insight into the complexities of ideology, power, and philosophical tradition in the modern age.

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Designing a Theory-Driven Multimodal Vocabulary Learning Module for Chinese EFL Learners

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Abstract—This study presents the design of a theory-driven multimodal vocabulary learning module developed for first-year non-English majors at a Chinese application-oriented university. Drawing upon Multimodal Literacy Framework, Discourse-Based Instruction, and the Gradual Release of Responsibility (GRR) model, the module aims to enhance learners' productive vocabulary knowledge through structured, scaffolded instruction that integrates visual, auditory, kinesthetic, and textual modalities. The development process followed the Sidek Module Development Model, encompassing comprehensive steps from needs analysis to content selection, strategy integration, and instructional sequencing. Each activity within the module was explicitly aligned with the GRR instructional stages ("I do, We do, You do") to promote gradual learner autonomy in vocabulary output. The resulting module features a combination of vocabulary presentation, collaborative tasks, discourse-based reading, and multimodal production assignments such as storytelling and digital design. The study details the design rationale, theoretical underpinnings, and pedagogical structure of the module, providing a replicable framework for EFL educators seeking to foster productive vocabulary development in low-proficiency learners. While no empirical data are presented in this paper, the module is positioned for future classroom validation and practical adaptation across applied university settings.

Index Terms—multimodal learning, vocabulary instructional design, Gradual Release of Responsibility (GRR), Sidek Module Development Model, module design

I. INTRODUCTION

Over the past decade, higher education worldwide has increasingly emphasized employability to meet the evolving demands of the labor market (Scandurra et al., 2024). In China, this shift is reflected in the strategic promotion of application-oriented universities—institutions designed not only to transmit academic knowledge but also to serve regional economic development and industrial upgrading through practical skills training, innovation-driven pedagogy, and close university–industry collaboration (Zhao et al., 2024). In line with this mission to integrate education with industry and prepare graduates for workplace demands, college English instruction is undergoing a parallel transformation (Jiang, 2020; Liang, 2021; Meng et al., 2023). Rather than serving merely as a vehicle for linguistic knowledge acquisition and examination preparation, English courses are increasingly positioned as practical, skills-oriented components of the curriculum that enable students to communicate effectively in authentic academic and professional contexts (Fu, 2024). However, in many application-oriented universities, traditional practices—such as the grammar-translation method and rote vocabulary memorization—remain prevalent, limiting learners' capacity for real-time expression and meaningful engagement (Xu & Zhang, 2021).

Among the various components of English instruction, vocabulary learning remains both fundamental and underdeveloped. Most existing curricula focus heavily on receptive vocabulary—the ability to recognize and understand words—while placing far less emphasis on productive vocabulary (Pan, 2023), which involves the ability to accurately and appropriately use words in speaking and writing (Jia, 2024). Without sufficient productive vocabulary, learners struggle to express ideas, sustain interactions, and meet the communicative demands of academic or professional tasks (Schmitt et al., 2020; Webb & Nation, 2017).

To address this issue, multimodal vocabulary instruction has gained increasing scholarly attention in recent years. Drawing on the Cognitive Theory of Multimedia Learning (Mayer, 2005) and the framework of Multimodal Literacy (Jewitt, 2008; Kress & Van Leeuwen, 2001), this approach integrates visual, auditory, kinesthetic, and textual channels to enhance cognitive processing, memory retention, and learning depth. Empirical studies suggest that multimodal strategies can outperform unimodal methods in supporting vocabulary acquisition, especially among low-proficiency or

demotivated learners (Aedo & Millafilo, 2022; Bansong et al., 2023; Bai, 2023). Additionally, discourse-based instruction has been found to deepen word learning by embedding vocabulary in meaningful, real-world contexts (Gee, 2008; Hyland, 2014), bridging the gap between isolated vocabulary exposure and contextualized usage.

Yet, while both multimodal and discourse-based instruction offer promising directions, their classroom implementations often lack structure and pedagogical coherence. Many current practices are fragmented and short-term, with limited theoretical integration and instructional scaffolding (Argyriou & Tapsis, 2025; Huang, 2025; Muhammad Nur Iman & Nurasia Natsir, 2025). In particular, few designs systematically support learners' transition from guided input to independent output—a core process in vocabulary development.

To respond to these challenges, this study introduces a theory-driven vocabulary learning module that integrates Multimodal Literacy Framework, Discourse-Based Instruction, and the Gradual Release of Responsibility (GRR) model. Multimodal Literacy Framework informs the design by incorporating visual, auditory, kinesthetic, and textual channels to enhance learners' cognitive processing, memory retention, and engagement (Argyriou & Tapsis, 2025; Huang, 2025; Jewitt, 2008; Kress & Van Leeuwen, 2001). Discourse-Based Instruction situates vocabulary learning within meaningful, real-world contexts, enabling students to encounter and use target words in authentic communicative tasks (Gee, 2008; Hyland, 2014). GRR provides a structured instructional architecture—"I do, We do, You do"—that gradually shifts responsibility from teacher to learner, ensuring a smooth transition from guided practice to independent production (Fisher & Frey, 2021). Combined, these frameworks create a module that is multimodal and context-rich, while also being scaffolded and learner-centered, enabling students to build productive vocabulary knowledge with both theoretical grounding and practical relevance.

Methodologically, the module was developed using the Sidek Module Development Model (Madihie & Noah, 2013; Zainudin et al., 2021), a structured 13-step framework that ensures theoretical alignment, instructional feasibility, and design validity. The resulting module features sequenced vocabulary tasks, real-world discourse integration, and multimodal output activities supported by teacher modeling and feedback.

Instead of presenting empirical outcomes, this paper focuses on detailing the theoretical foundations, pedagogical rationale, and instructional structure of the module. It aims to provide a replicable and adaptable framework for EFL educators seeking to develop productive vocabulary knowledge among learners in applied university contexts.

II. LITERATURE REVIEW

This literature review provides the conceptual and empirical foundation for the theory-driven multimodal vocabulary learning module proposed in this study. The review is organized into four thematic areas: (1) productive vocabulary knowledge in EFL contexts, (2) multimodal vocabulary instruction, (3) discourse-based vocabulary instruction, and (4) instructional design models. Each section discusses key developments in the respective field and identifies research gaps relevant to the context of applied universities in China.

A. Productive Vocabulary Knowledge in EFL Contexts

Productive vocabulary knowledge refers to learners' ability to retrieve and use lexical items appropriately in speaking and writing. It requires not only knowledge of word form and meaning, but also accurate use in context through grammatical, collocational, and register awareness (Nation, 2006; Schmitt et al., 2020). Compared to receptive vocabulary, productive vocabulary is cognitively more demanding as it involves lexical recall, contextual adaptation, and real-time generation (Laufer, 2005; Laufer & Nation, 1999).

In the past decade, researchers have increasingly highlighted the gap between receptive and productive vocabulary development, especially among EFL learners. Empirical studies show that productive vocabulary is best developed through output-oriented and context-rich tasks. For example, Teng and Xu (2022) demonstrated that translation, retelling, and generative writing tasks significantly improved learners' ability to produce target words. Similarly, Jia (2024) found that productive use of vocabulary in speaking and writing tasks correlates strongly with communicative performance, more so than recognition-based knowledge. Repetition, contextualization, and output opportunities have emerged as critical variables in recent findings (Pan, 2023; Teng & Xu, 2022).

Despite these advances, few studies have systematically applied these strategies in the setting of Chinese applied universities. These institutions often face unique challenges such as limited instructional time, low learner motivation, and lack of authentic task contexts, which hinder effective vocabulary development. Therefore, there is a pressing need to develop structured and context-sensitive interventions that support productive vocabulary growth in these settings.

B. Multimodal Vocabulary Instruction: From Theory to Practice

Building on the need for more effective vocabulary development methods, multimodal instruction has emerged as a promising approach that supports learners' lexical development through multiple sensory and symbolic channels. It addresses key cognitive challenges in vocabulary learning by integrating input across modalities and enhancing retention, engagement, and depth of processing.

Multimodal instruction is grounded in Mayer's (2005) cognitive theory of multimedia learning and Kress and van Leeuwen's (2001) theory of multimodal literacy. It emphasizes the pedagogical value of combining visual, auditory, kinesthetic, and textual input to facilitate meaning construction. Early research has shown that multimodal learning

strategies, which involve multiple sensory systems simultaneously, can significantly enhance vocabulary retention and comprehension. For instance, Al-Jarf (2023) demonstrated that integrating visual stimuli such as images and animations into vocabulary instruction can significantly improve students' ability to remember and use new words.

Recent developments have focused on learner-generated multimodal tasks, made possible by digital tools like Quizlet, Canva, and video editing platforms. Teng (2023) showed that such tools improve learners' attention, emotional engagement, and processing depth. Bansong et al. (2023) confirmed that creating visual stories and multimedia compositions helps learners engage more deeply with vocabulary, making it more meaningful and memorable.

Yet, empirical syntheses reveal that classroom implementations of multimodal or discourse-based instruction often lack structure and pedagogical coherence. Argyriou and Tapsis (2025) found that multimodal research remains fragmented across disciplines and is typically delivered as short-term, isolated interventions without sustained scaffolding. Iman and Natsir (2025) reported that even when translanguaging—an inherently multimodal practice—is introduced in digital environments, teachers struggle to integrate pedagogical aims with technological affordances, resulting in sporadic and disjointed activities. Huang (2025), reflecting on Chinese EFL contexts, observed that the newly adopted “Smart Classrooms” frequently reduce multimodality to a display of digital devices rather than a coherent instructional sequence, leading to what she terms “formalism without pedagogical substance.” Collectively, these studies underscore the urgent need for theoretically integrated, replicable frameworks that embed multimodal techniques within sustained, scaffolded module designs aligned with learners' cognitive and contextual needs.

C. Discourse-Based Vocabulary Instruction: Bridging Context and Use

While multimodal instruction can enhance cognitive input and learner engagement by integrating multiple sensory channels—visual, auditory, kinesthetic, and textual—multimodality alone is not sufficient to ensure the effective use of vocabulary in authentic communication. Discourse-based vocabulary instruction complements this approach by embedding target vocabulary within real-world genres and communicative contexts, thereby increasing the contextualization and functional relevance of learning. Caro and Mendiñeta (2017) pointed out that lexical competence encompasses not only knowledge of word meanings but also mastery of collocations, grammatical patterns, and discourse functions. Since the mid-2010s, research has shown that embedding vocabulary learning in authentic tasks—such as narrative writing, workplace emails, and academic presentations—can significantly enhance learners' vocabulary mastery and usage (Webb & Nation, 2017). Building on this, Wakasa (2024) demonstrated that discourse analysis not only improves ESL learners' reading comprehension but also, by increasing contextualization and interactivity, enables teachers to better tailor instruction to learners' communicative needs and to promote a deeper understanding of vocabulary use. Similarly, Qiann et al. (2025) found that integrating instructional discourse analysis with communicative language teaching not only improves students' pragmatic competence but also transforms classroom interaction patterns, making learning more engaging and inclusive; students participating in such activities exhibited greater fluency and confidence in authentic communication.

The integration of multimodality and discourse analysis offers a complementary and synergistic pathway for vocabulary instruction. On the one hand, multimodal tasks stimulate learners' creative expression and active engagement; on the other, discourse-driven activities ensure the contextual authenticity and functional appropriateness of vocabulary use. Research by Teng (2023) shows that when learners create multimodal artifacts such as infographics, role-plays, or video blog scripts, they not only enhance their vocabulary and discourse competence but also strengthen creativity and motivation. Such integrated tasks are particularly well suited to the instructional priorities of application-oriented universities, where professional relevance and communicative competence are emphasized. By combining the two approaches, teachers can create a rich, interactive, and application-oriented learning environment that supports the simultaneous development of vocabulary acquisition and overall communicative competence.

D. Instructional Design Models: The Role of the GRR and Sidek Module Development Model

The effective integration of multimodal and discourse-based vocabulary instruction requires a structured instructional design framework. While the ADDIE model (Branch, 2009) is widely used, it has been criticized for its generality and limited consideration of learner diversity and early-stage validation (Simmons, 2012).

To address these limitations, this study adopts two complementary frameworks: the Gradual Release of Responsibility (GRR) model and the Sidek Module Development Model (SMDM). The GRR model (Fisher & Frey, 2021) provides a scaffolded instructional delivery structure that guides the implementation of each activity. Organized into three sequential stages—“I do,” “We do,” and “You do”—the model supports students' gradual transition from teacher modeling to collaborative practice and, ultimately, to independent vocabulary use. GRR is particularly well-suited for structured output-oriented vocabulary learning in EFL contexts, as it ensures learners receive sufficient support before being asked to perform autonomously.

At a broader level, the Sidek Module Development Model (Madihie & Noah, 2013) offers a systematic, theory-informed framework for the development of the vocabulary learning module itself. Originally designed for counseling interventions, SMDM has since been applied to educational settings, including language learning (Zainudin et al., 2021). The model emphasizes needs analysis, cultural contextualization, and empirical validation. SMDM consists of two main phases. The first, module development, includes nine steps: (1) aim setting, (2) theory and learner identification, (3) needs analysis, (4) goal setting, (5) content selection, (6) strategy selection, (7) logistics planning, (8) media and

technology integration, and (9) component integration. The second phase, validation, involves expert review and pilot testing to ensure content validity and instructional effectiveness.

Together, GRR and SMDM serve complementary roles: GRR structures the internal instructional flow of each activity, while SMDM guides the overarching development and evaluation of the module. This dual-framework approach ensures both pedagogical coherence and developmental rigor in the implementation of the multimodal vocabulary learning module.

In summary, research in vocabulary instruction has shifted from rote memorization toward output-oriented, multimodal, and discourse-integrated pedagogies. Yet, productive vocabulary knowledge remains underdeveloped due to gaps in instructional design and contextual alignment. Existing literature supports the use of multimodal tasks and discourse-based scaffolding, but few studies have integrated these under a unified and validated module. This study addresses this gap by proposing a structured, theory-driven vocabulary learning module grounded in SMDM, with instructional delivery based on GRR, and a clear focus on improving learners' productive vocabulary outcomes.

III. THEORETICAL FRAMEWORK

Building on the preceding literature, this study integrates Multimodal Literacy Framework (Jewitt, 2008; Kress & Van Leeuwen, 2001) and Discourse-Based Instruction (Gee, 2008; Hyland, 2014) as the two foundational theoretical pillars guiding the design of the vocabulary learning module. These theories inform content selection, task typology, and instructional strategies by emphasizing meaning-making through multiple semiotic modes and the contextualized use of language in authentic discourse (Coxhead, 2025; Mayer, 2005; Nation, 2006).

To translate these theoretical insights into classroom practice, this study employs the Gradual Release of Responsibility (GRR) model (Fisher & Frey, 2021) as the core instructional delivery framework. Widely operationalized as the "I do, we do, you do" model, GRR scaffolds students' transition from teacher-led modeling to peer collaboration and independent language production. It enables systematic support for learners throughout input, guided practice, and output stages—aligning well with the goals of productive vocabulary instruction.

To ensure that the module design is pedagogically sound, systematically structured, and culturally responsive, the Sidek Module Development Model (SMDM) (Madihie & Noah, 2013; Zainudin et al., 2021) was employed as the overarching instructional design framework. This model provides a stepwise, theory-informed process for module creation, covering goal setting, learner analysis, instructional content design, strategy selection, logistics, and formative validation.

The module is specifically designed to promote productive vocabulary knowledge—the ability to accurately retrieve and use target lexical items in contextually appropriate speech and writing (Laufer, 2005; Nation, 2006). Productive vocabulary is also the primary outcome variable in the module's instructional design and planned evaluation.

Unlike previous interventions that adopt isolated theoretical approaches or overemphasize receptive vocabulary acquisition (Jia, 2024; Teng & Xu, 2022), this study proposes an integrated instructional framework that combines multimodal input–output processing, discourse-rich learning contexts, and scaffolded delivery using the GRR model. This triangulated design offers both theoretical rigor and pedagogical feasibility for enhancing vocabulary instruction among low-proficiency EFL learners in application-oriented universities.

IV. MODULE DESIGN AND DEVELOPMENT

This vocabulary learning module was developed to address the needs of non-English majors in a Chinese application-oriented university, focusing on enhancing their productive vocabulary knowledge. The design was theoretically grounded in Multimodal Literacy Framework (Kress & Van Leeuwen, 2001) and Discourse-Based Instruction (Gee, 2008), and methodologically guided by two complementary frameworks: the Gradual Release of Responsibility (GRR) model (Fisher & Frey, 2021), which structures the scaffolding of classroom instruction from teacher modeling to independent student performance; and the Sidek Module Development Model (SMDM) (Madihie & Noah, 2013).

In the present study, only Phase I (the first nine steps) of the SMDM was implemented and reported. This decision was made to allow for a focused and in-depth presentation of the module's theoretical grounding, content design, and instructional sequencing without the constraints of empirical data reporting. Phase II (validation and refinement) will be addressed in a separate follow-up study. Together, these frameworks ensured that the module was pedagogically coherent, theoretically grounded, and practically feasible. Following are the nine steps of Phase I.

Step 1. Aim of Module Setting

The core objective was to improve students' productive vocabulary knowledge—i.e., their ability to recall and use target vocabulary in contextually appropriate speaking and writing tasks.

Step 2. Theory and Target Group Identification

The design integrated Multimodal Literacy Framework and Discourse-Based Instruction as the core theoretical foundations. The target group consisted of first-year non-English major students at a Chinese application-oriented university.

Step 3. Needs Analysis

Recent studies confirm that Chinese university EFL learners often have strong receptive vocabulary knowledge but struggle with productive use in speaking and writing (Lai & Wang, 2025; Wan et al., 2025). Limited productive vocabulary has been shown to hinder accuracy and fluency in authentic communication (Min & Sukying, 2024). Consistent with these findings, the researcher's decade of teaching experience in applied universities indicates that fewer than 20% of students can use newly learned vocabulary accurately in complete sentences during class, with most relying on L1 translation or single-word responses. While receptive recognition is generally adequate, spontaneous and accurate productive use is rare. These observations stem from regular teaching practice, involved no personal data, and therefore required no formal ethical approval. This convergence of published evidence and classroom experience highlights the need for a theory-driven intervention to strengthen productive vocabulary use.

Step 4. Goal Setting

Specific, measurable goals were developed to improve productive use of vocabulary in communication-oriented tasks.

Step 5. Content Selection

Vocabulary items were drawn from first-semester College English textbooks and verified against COCA and BNC corpora for frequency and authenticity. Items relevant to workplace and daily communication were prioritized.

Step 6. Strategy Selection

Input strategies included the use of images, videos, and audio to introduce vocabulary. Output tasks included infographics, short videos, and storytelling. Instructional strategies were aligned with Cognitive Load Theory and Dual Coding Theory (Paivio, 2014) to promote meaningful retention.

Additionally, each activity was structured using the Gradual Release of Responsibility (GRR) model (Fisher & Frey, 2021), which supports scaffolded learning through three stages: *I do* (teacher modeling), *We do* (guided practice), and *You do* (independent application). This model ensured that students received adequate support when transitioning from multimodal vocabulary input to independent language production tasks.

Step 7. Logistics Planning

The module was integrated into a 16-week semester, with weekly 4-hour sessions combining vocabulary input, multimodal tasks, and formative assessment. Digital platforms such as Chaoxing Learning Platform were used for homework and projects.

Step 8. Media and Technology Selection

Tools such as PowerPoint and Quizlet were selected to support both input delivery and student production, promoting multimodal literacy and creative expression.

Step 9. Module Combination Process

All instructional elements were compiled into a sequenced module, organized by thematic weekly units aligned with the curriculum. Activities within each unit followed a structured delivery pattern based on the GRR instructional sequence, progressing from teacher-led demonstrations to collaborative work and then to independent application. This allowed students to internalize vocabulary knowledge progressively while engaging in multimodal and discourse-based tasks.

V. DESIGN OUTPUT AND THEORETICAL JUSTIFICATION

A. Module Architecture Overview

This multimodal vocabulary learning module is systematically designed to enhance the productive vocabulary knowledge of first-year non-English majors at Chinese application-oriented universities. The module is grounded in Multimodal Literacy Framework (Jewitt, 2008; Kress & Van Leeuwen, 2001), Discourse-Based Instruction (Gee, 2008; Hyland, 2014), and the Gradual Release of Responsibility (GRR) Model (Fisher & Frey, 2021), ensuring pedagogical alignment with learners' cognitive, linguistic, and affective needs.

The structure of the module follows two main dimensions:

1) Horizontal Structure (Lesson Sequence):

The module comprises 5 instructional units, each delivered over 2 class sessions, with 4 interconnected activities per session, totaling 8 activities per unit. These activities are organized in a spiraling and progressive sequence that supports learners' transition from perceptual input to creative output. The design ensures cognitive scaffolding and gradual transfer of responsibility from teacher to learner.

2) Vertical Structure (GRR Pedagogical Scaffolding):

Each activity is framed within the three stages of the GRR model:

I do: The teacher models the target vocabulary through pronunciation, spelling, or usage.

We do: The teacher guides the class through structured practice, emphasizing joint meaning construction and formative feedback.

You do: Students independently complete output tasks such as sentence creation, oral production, or multimodal projects.

Table 1 summarizes the core design elements of the module:

TABLE 1
MODULE DESIGN OVERVIEW

Dimension	Description
Instructional Length	4 units $\times$ 2 lessons = 8 lessons
Tasks per Session	4 tasks per session, 8 tasks per unit
Target Learners	First-year non-English majors in Chinese application-oriented universities
Learning Focus	Productive Vocabulary Knowledge (PVK)
Theoretical Foundations	Multimodal Literacy Framework, Discourse-Based Instruction, GRR
Delivery Format	In-class instruction + digital homework
Technological Tools	PowerPoint, Quizlet, Chaoxing Learning Platform, etc.

This architecture prioritizes rich language context, modal integration, and progressive cognitive engagement, with the GRR model serving as a backbone for both instructional delivery and teacher behavior observation. It aims to foster meaningful, transferable vocabulary production in EFL contexts specific to the needs of applied university settings in China.

B. Sample Tasks and Theoretical Mapping

The multimodal vocabulary learning module comprises eight interrelated activities per unit, each purposefully designed to activate various modes of learning and align with specific theoretical underpinnings. Each unit is delivered over two lessons, with four activities implemented per lesson to ensure focused progression and cognitive manageability. Table 2 below presents representative tasks from Unit 1 and maps each to its corresponding theoretical foundation and instructional function within the Gradual Release of Responsibility (GRR) framework.

Each task is designed not in isolation, but as part of a cohesive instructional sequence. For instance, vocabulary introduced through multimodal input in *Activity 1* is reinforced through collaborative practice in *Activity 2 and 3*, and then further internalized through independent creation in *Homework 1*. This flow ensures consistent application of the “I do – We do – You do” structure while scaffolding learners toward autonomous vocabulary use.

TABLE 2
SAMPLE TASKS WITH GRR PHASES AND THEORETICAL FOUNDATIONS OF UNIT

	Activity Name	Modality Used	Objective	Theoretical Support	Materials	GRR Implementation
Lesson 1	1 Vocabulary Presentation and Pronunciation Practice	Visual & Auditory	Memorize meaning and pronunciation of vocabulary through multi-sensory input	Multimodal Literacy Framework	Slides (vocabulary, images, pronunciation)	I do: Teacher models pronunciation with visuals; We do: Students repeat with guidance; You do: Students pronounce and write target words independently
	2 Listening and Sentence Writing	Auditory & Textual	Understand and apply vocabulary via listening and writing	Discourse-Based Instruction	Listening quiz, recordings	I do: Teacher demonstrates how to listen for and note key vocabulary. We do: Teacher and students co-construct a model sentence. You do: Students write their own sentences based on the listening task.
	3 Vocabulary Puzzle Game	Kinesthetic, Visual & Textual	Reinforce vocabulary through kinesthetic group activity	Multimodal Literacy Framework	Vocabulary cards (physical or digital), Quizlet match activity, image/context cards	I do: Teacher demonstrates matching game using Quizlet; We do: Students complete initial rounds in pairs using Quizlet; You do: Each student completes the match individually and reflects on incorrect responses.
	4 Homework 1: Vocabulary Log	Visual & Textual	Reinforce understanding and practical application of the vocabulary.	Multimodal Literacy Framework; Discourse-Based Instruction	Storyboard templates or digital creation tools; Super Star platform	I do: Teacher shows examples of completed logs and explains how to use images + sentences. We do: Teacher helps students brainstorm example entries. You do: Students complete vocabulary logs independently with sentence + image.
Lesson 2	5 Vocabulary Relay	Visual, Textual & Kinesthetic	Enhance vocabulary recall and engagement via physical spelling game	Multimodal Literacy Framework	Slides (images and definitions)	I do: Teacher demonstrates the gameplay. We do: Teams practice the relay in low-stakes rounds. You do: Students participate independently and retrieve words under timed conditions.
	6 Discourse-Based Instruction	Auditory & Textual	Understand vocabulary in discourse-based real-world contexts	Discourse-Based Instruction	Articles with vocabulary, audio & text	I do: Teacher guides reading and explains vocabulary in context. We do: Teacher and students annotate and discuss key words in the text. You do: Students summarize or write reflections using the new words.
	7 Group Discussion and Story Creation	Visual, Auditory & Textual	Integrate vocabulary in collaborative and creative story tasks	Multimodal Literacy Framework	Story worksheet, rubric, digital tools	I do: Teacher models how to turn vocabulary into narrative. We do: Students collaboratively write a short story using key vocabulary. You do: Each student contributes a scene or sentence independently.
	8 Homework 2: Storyboard or Digital Story Creation	Visual, Auditory & Textual	Consolidate understanding and application of vocabulary in a real-world context and demonstrate creative achievements.	Multimodal Literacy Framework; Discourse-Based Instruction	Storyboard templates or digital creation tools; Super Star platform	I do: Teacher explains expectations and shows story examples. We do: Teacher helps students plan out storyboards. You do: Students independently complete digital or drawn story using vocabulary.

Moreover, the tasks emphasize productive vocabulary knowledge (PVK)—the ability to generate accurate and contextually appropriate vocabulary in speaking and writing. This is particularly essential for low-proficiency EFL learners in applied universities, who often lack sufficient opportunities for output-based practice.

By grounding each activity in both theoretical rationale and instructional progression, the module ensures pedagogical coherence, learner engagement, and replicability in similar educational contexts.

C. Pedagogical Innovation and Transferability

This vocabulary learning module demonstrates significant pedagogical innovation within the context of English instruction for non-English majors at Chinese application-oriented universities. Departing from traditional vocabulary teaching practices—such as rote memorization, word lists, and isolated translation exercises—this module is grounded in Multimodal Literacy Framework and Discourse-Based Instruction, and is implemented through the Gradual Release of Responsibility (GRR) model, with the primary aim of enhancing students' productive vocabulary knowledge, particularly their ability to use target words accurately and appropriately in real-world contexts.

A key innovation of the module lies in its intentional multimodal integration. Each activity is designed to engage learners through two to three sensory modalities (e.g., visual + auditory, kinesthetic + textual, etc.), thereby activating multiple cognitive channels to deepen comprehension, support memory retention, and promote meaningful language use. Moreover, the cognitive sequence of each activity progresses from input to output, and from low- to high-order thinking. This is achieved through the GRR framework, which guides students through three stages: teacher modeling (I do), guided practice (We do), and independent application (You do). Such a scaffolding mechanism ensures balanced instructional support while fostering learner autonomy and communicative competence.

Additionally, the use of the Sidek Module Development Model (SMDM) ensures that the entire design process—from objective formulation and task design to instructional strategy and evaluation—is systematic, theoretically coherent, and culturally responsive.

In terms of transferability, although this module is tailored for Chinese application-oriented universities, its design principles—multimodal scaffolding, discourse embedding, structured progression, and task alignment—are highly generalizable. With flexible tools such as Quizlet, educators across different contexts can adapt the module to suit their curricular and cultural needs.

In sum, this module offers an innovative, theory-driven alternative to decontextualized, teacher-centered vocabulary instruction. It provides a replicable, adaptable, and scalable instructional framework for EFL educators aiming to shift toward output-focused, learner-engaged, and multimodally supported vocabulary teaching.

D. Comparison With Existing Practices

As reviewed earlier, vocabulary instruction in Chinese universities has been shifting toward greater contextualization and communicative relevance, with increasing adoption of multimodal strategies and discourse-based activities to enhance learner engagement (Pan, 2023). These innovations reflect a growing recognition of the need to connect vocabulary learning with authentic language use in academic and professional contexts (Jia, 2024). However, classroom implementations often remain fragmented, short-term, and lacking in sustained scaffolding or systematic theoretical integration (Argyriou & Tapsis, 2025; Huang, 2025; Muhammad Nur Iman & Nurasia Natsir, 2025). While such practices may introduce diverse techniques, they frequently operate without a coherent instructional design framework, making it difficult to ensure continuity, contextual relevance, and replicability across lessons and courses.

In contrast, the module developed in this study is explicitly designed to address these limitations. First, it shifts the instructional focus from receptive recognition to productive vocabulary development through output-oriented, multimodal, and discourse-based tasks—such as storytelling, infographic creation, video production, and collaborative discussions—that require students to use target vocabulary meaningfully in authentic contexts. Second, its instructional delivery follows the Gradual Release of Responsibility (GRR) model (Fisher & Frey, 2021), ensuring a scaffolded learning process from teacher modeling to guided practice and independent production. Finally, the module's development adheres to the Sidek Module Development Model (SMDM) (Madihie & Noah, 2013; Zainudin et al., 2021), which provides a structured and validated framework to ensure theoretical alignment, cultural contextualization, and instructional feasibility. This integration of theoretically grounded pedagogy with systematic design stands in marked contrast to the fragmented and input-heavy practices prevalent in many existing EFL classrooms in Chinese application-oriented universities.

E. Discussion of Theoretical Coherence

The strength of this vocabulary learning module lies in its deliberate integration of multiple theoretical frameworks to ensure both pedagogical robustness and contextual adaptability. Each design decision—from content sequencing to modality alignment and classroom task progression—was guided by a triangulated theoretical foundation that includes Multimodal Literacy Framework, Discourse-Based Instruction, and the Gradual Release of Responsibility (GRR) model.

Multimodal Literacy Framework (Jewitt, 2008; Kress & Van Leeuwen, 2001) provided the epistemological grounding for integrating visual, auditory, kinesthetic, and textual modalities in each activity. Rather than treating language in isolation, this perspective allowed vocabulary instruction to be situated within meaning-making practices across multiple semiotic channels. For instance, activities such as storyboard creation and vocabulary puzzles required learners to engage with visual and kinesthetic input while simultaneously producing linguistic output, thus deepening cognitive processing and memory encoding (Mayer, 2005).

Discourse-Based Instruction (Gee, 2008; Hyland, 2014) informed the contextualization of vocabulary tasks within authentic communicative situations. Unlike traditional approaches that isolate vocabulary lists from meaningful use, this module embedded lexical items within narrative texts, dialogues, and student-created discourse. This ensured that vocabulary learning occurred not only at the lexical level, but also in the broader context of pragmatics and genre-based competence (Webb & Nation, 2017).

To operationalize these theories at the classroom delivery level, the GRR model (Fisher & Frey, 2021) was adopted as a sequencing mechanism. The “I do–We do–You do” scaffold guided the progression of each activity, beginning with teacher modeling, followed by guided practice, and culminating in independent student performance. This model provided a clear, research-backed structure for balancing support and autonomy, which is particularly crucial for low-proficiency learners in application-oriented universities (Fisher & Frey, 2021). It also ensured that each multimodal task was not implemented as a discrete activity, but as part of a sequenced instructional arc that aligns with the cognitive development of the learner.

Moreover, the entire module design process was structured using the Sidek Module Development Model (SMDM) (Madihie & Noah, 2013), which served as a meta-framework ensuring internal consistency and theoretical alignment across all stages—from needs analysis and goal setting to content design and formative assessment. This layered integration of theories and models resulted in a module that is not only pedagogically coherent but also scalable, transferable, and responsive to the evolving goals of applied English instruction in higher education.

In sum, the module reflects a synergistic application of theoretical perspectives, translating complex educational principles into practical, observable, and replicable classroom strategies. This coherence strengthens the module's potential for impact and serves as a model for theory-driven instructional innovation in the field of English as a Foreign Language (EFL).

F. Ethical Approval and Informed Consent

This study did not involve the collection of personal or sensitive data from human participants. Therefore, ethical approval and informed consent were not required. However, the module design and description were developed in accordance with professional ethical standards in educational research.

VI. CONCLUSION

The development of this theory-driven multimodal vocabulary learning module carries meaningful pedagogical and theoretical implications for EFL instruction in application-oriented university contexts. By integrating the principles of Multimodal Literacy Framework and Discourse-Based Instruction with the Gradual Release of Responsibility (GRR) framework, the module offers a structured yet flexible blueprint for enhancing learners' productive vocabulary knowledge in ways that are both cognitively engaging and contextually relevant. Unlike traditional vocabulary instruction that often prioritizes recognition and rote memorization, this module underscores the importance of language output, multimodal representation, and scaffolded instructional delivery. Such a shift aligns with global trends in competency-based language education and responds to the increasing demands for communication-oriented English teaching in Chinese higher education.

The design also has the potential to contribute to the field of instructional design. Drawing on the Sidek Module Development Model (SMDM), the module was developed through a sequenced, evidence-informed process intended to bridge theory and classroom implementation. The planned use of GRR as a delivery framework is expected to ensure that each learning activity incorporates clear modeling, guided practice, and opportunities for independent use, thereby supporting learners' gradual transition from supported input to autonomous output. This structure may be particularly beneficial for low-proficiency learners, who often lack the confidence or competence to apply new vocabulary independently without systematic scaffolding. While the present study does not report on classroom implementation, the model holds strong potential for adaptation across a range of EFL teaching environments, especially those aiming to foster deeper vocabulary engagement and long-term retention.

While the current study focuses on module construction rather than empirical testing, the design itself serves as a foundational contribution that may be further validated and refined through future classroom-based implementation and research. The modular structure and task typology can be readily adopted or adapted by practitioners in other contexts. Moreover, the theoretical integration proposed herein invites further scholarly exploration of how multimodal input, discourse-rich contexts, and scaffolded instruction may interact to support different learner profiles and vocabulary outcomes. Future research may examine the long-term effects of such modules on learner autonomy, motivation, and communicative competence, as well as explore technological extensions such as digital platforms or AI-assisted multimodal tasks to scale the implementation. In sum, the present module not only addresses an immediate pedagogical gap, but also lays the groundwork for a replicable, theory-informed model of vocabulary instruction that can evolve alongside emerging educational needs and technological advancements.

To conclude, this study presents the design and theoretical foundation of a structured multimodal vocabulary learning module aimed at enhancing productive vocabulary knowledge among non-English majors at a Chinese application-oriented university. Grounded in Multimodal Literacy Framework and Discourse-Based Instruction, and scaffolded by the Gradual Release of Responsibility (GRR) model, the module was systematically constructed through the Sidek Module Development Model (SMDM). This integrated approach allowed for the alignment of content, pedagogical strategies, and task design to support meaningful vocabulary use in both spoken and written contexts.

Unlike fragmented instructional practices or theory-light applications, this module demonstrates how a coherent and replicable framework can be developed to promote vocabulary learning through multimodal input and structured output. The incorporation of GRR ensures that each activity transitions from teacher modeling to collaborative practice and

finally to independent application, thus addressing the needs of low-proficiency learners for support, practice, and autonomy. The resulting module not only reflects sound pedagogical principles but also responds to the practical realities and policy expectations of China's application-oriented higher education system.

Although this article does not include empirical findings, the completed design provides a strong foundation for future validation studies. Follow-up research may examine the implementation of the module in real classroom contexts, evaluate learner engagement and outcomes, and further refine its components based on empirical data. Ultimately, this module offers not only an innovative contribution to vocabulary instruction in EFL contexts but also a scalable and theoretically grounded model for designing integrated language learning materials.

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Feminine Traces in Dayak Kanayatn Leadership: A Feminist Literary Analysis of Seven Selected Stories

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Abstract—Women's leadership in indigenous groups is notably underrepresented in academic literature, especially concerning the Dayak Kanayatn tribe of West Kalimantan. Although prevailing narratives often confine women to domestic and symbolic roles, local legends provide substantial evidence of female leadership. This study utilizes feminist literary criticism to analyze depictions of female leaders in seven Dayak Kanayatn legends. Employing a qualitative methodology, we executed comprehensive interviews, interactive observation, and document analysis to investigate narrative and symbolic frameworks. Findings indicate that female figures in these stories work not as ancillary characters but as community leaders who wield decision-making power, offer social safety, and fulfill the role of spiritual guardians. These narratives contest patriarchal beliefs, illustrating that gender equality is intrinsically integrated throughout the Dayak Kanayatn tradition. The research enhances contextual feminist literary theory and promotes gender-inclusive cultural preservation. By connecting scholarly dialogue and grassroots empowerment, it provides a framework for restoring indigenous women's leadership through the application of local knowledge.

Index Terms—women, leadership, Dayak Kanayatn, feminist literary criticism

I. INTRODUCTION

Women's leadership in indigenous communities is often marginalized in public discourse and scholarly studies, particularly in the context of local communities such as the Dayak Kanayatn in West Kalimantan. This society is known for its complex social structure and rich local wisdom; however, narratives concerning women's roles, especially in leadership positions, are rarely systematically documented. The prevailing image of indigenous leadership is predominantly male-centric, portraying men as authoritative decision-makers, while women are often relegated to complementary roles within the domestic sphere (Nasrolahi et al., 2022). Nonetheless, the lived reality within the Dayak Kanayatn community reveals that women do not merely serve supporting roles but also occupy central positions in legendary tales and in spiritual and social leadership practices. Oral narratives within the community depict female figures as powerful, wise, and decisive in safeguarding communal values (Janickyj et al., 2024). Unfortunately, such inherited knowledge remains unexamined mainly in academic studies, resulting in an imbalance in the representation of women in local leadership contexts, especially when compared to the often-celebrated status of men (Mager et al., 2023). Consequently, there is an urgent need for academic endeavors to highlight the feminine legacy within the social and cultural structures of the Dayak Kanayatn, ensuring that women's leadership is no longer overlooked. This endeavor is equally vital in deconstructing the patriarchal narratives that have long dominated anthropological, historical, and local literary studies (Aji et al., 2022). As such, examining women's leadership within this community becomes highly relevant in presenting a more equitable, balanced, and contextually grounded understanding of indigenous social realities.

In academic discourse, women's involvement in indigenous leadership structures has been a subject of prolonged debate. While numerous feminist theories and cultural anthropologies have recognized women's roles in communal spaces, most studies focus on urban societies or well-documented major ethnic groups (Da Meisa & Anzari, 2021). When discussing indigenous communities such as the Dayak Kanayatn, available literature remains scarce and often descriptive, lacking in-depth analysis of women's symbolic power and authority. Classical feminist theory, as developed by Simone de Beauvoir, has not been able to fully address the diversity of local cultures in Indonesia, which have unique social structures (Mandasari & Septiani, 2024). Although postcolonial feminist approaches have begun to offer

more inclusive frameworks, their application to indigenous leadership studies in Indonesia remains limited (Mohanty, 2003). Previous research often simplifies women's roles in indigenous societies, framing them primarily within domestic or spiritual domains and denying them absolute authority. However, local legends offer compelling narratives of women as leaders who play a pivotal role in maintaining social order and cultural values (Famelasari & Prastiwi, 2021). This indicates a disconnect between existing ethnographic data and available theoretical analyses, presenting a methodological challenge in fully understanding women's leadership in indigenous settings. Therefore, a more integrative approach is needed—one that bridges local cultural richness with modern theoretical frameworks. Literary feminist criticism, which analyzes not only textual but also sociocultural contexts, offers one such promising approach.

This study aims to describe the representation of women as leaders in the legends of the Dayak Kanayatn in West Kalimantan through the lens of feminist literary criticism. The objective arises from the need to reconstruct local narratives that portray women not merely as cultural objects but as active, strategic subjects with legitimate authority. This aligns with Showalter's (1981) concept of gynocriticism, which emphasizes the importance of analyzing literature from the perspective of women's lived experiences. Through this approach, the study aims to foreground female figures in indigenous oral literature, who have long been overlooked in mainstream literary discourse. The research not only identifies female leadership characters within the legends but also examines how such narratives construct authority, leadership values, and gender relations within the social fabric of the Dayak Kanayatn. These stories will be explored not only as cultural texts but also as ideological spaces in which power and gender identity are negotiated (Arivia, 2017). The study also aims to contribute a fresh perspective to Indonesian feminist discourse, which urban-centric narratives have long dominated. By focusing on a local community, this research highlights that women's struggles are not confined to modern or institutional domains, but also take place within traditional settings rich in symbolism and cultural meaning (Mohanty, 2003). Accordingly, the goal is to provide space for the interpretation and appreciation of feminine legacies embedded in Dayak Kanayatn legends and to assert that women's leadership is not a novel phenomenon. However, one deeply rooted in local wisdom deserves renewed academic attention.

The exploration of female leadership in indigenous societies has often been neglected by academic scholarship, particularly in the case of the Dayak Kanayatn community. This research gap lies in the lack of in-depth investigation into women's roles in local leadership narratives found within community legends. Previous studies have primarily focused on male figures as central actors in social systems or have viewed women through the lens of patriarchal culture that restricts their agency (Mardiana, 2002). The novelty of this study lies in its use of feminist literary criticism to uncover the meanings and symbolism of female leadership in oral texts—an approach that has been largely overlooked in both literary and feminist anthropological studies. The research also employs an interdisciplinary approach, integrating literary and cultural analysis by treating legend not only as a research object but also as a social mirror of the Dayak Kanayatn community. The urgency of this study is amplified in the face of modernization, which often erodes local values, including the roles of women in traditional social systems. Recovering women's narratives in local legends is, therefore, also an act of cultural preservation and a revival of awareness regarding the importance of women's roles in sustaining social equilibrium (Astono et al., 2024). Thus, this study is significant not only for addressing a scholarly void but also for reinforcing contextually grounded feminist and cultural movements based on indigenous values. It offers an alternative narrative that is not only gender-just but also culturally sensitive, making a meaningful contribution to the enrichment of Indonesia's academic discourse.

The primary contribution of this study is to provide a platform for women's narratives in the legends of the Dayak Kanayatn to be read, understood, and reinterpreted through a feminist literary lens. Academically, the research expands the scope of feminist studies, which have been predominantly urban and modern in focus, by introducing a culturally rich local perspective. This approach aligns with Budianta's (2003) call for incorporating local contexts in cultural and feminist studies. The study also contributes to the field of literary criticism by developing a more inclusive and culturally responsive methodology suited to the Indonesian context. Furthermore, the findings can serve as valuable references for policymakers, cultural practitioners, and gender activists seeking to understand the dynamics of women's leadership in indigenous communities. From the perspective of cultural preservation, this research contributes to the documentation of increasingly rare oral heritage and plays a role in maintaining the Dayak Kanayatn identity amid globalization. As Botangen et al. (2018) suggest, documenting local culture through the use of information technology can be an effective strategy to confront global challenges. The study also has educational value, offering materials suitable for teaching or community outreach programs on the role of women in local cultures. This practical contribution aims to foster collective awareness that women, particularly in indigenous communities, are not merely symbols of cultural honor but are also pivotal actors in leadership and decision-making processes. Therefore, through this study, it is hoped that both academic and general audiences will begin to recognize women's leadership as an integral component of Indonesia's plural and inclusive cultural narratives.

II. METHODOLOGY

This research was conducted in three regencies of West Kalimantan Province: Landak, Mempawah, and Bengkayang. It utilized a qualitative descriptive research design to achieve a comprehensive understanding of phenomena through interpretative and descriptive analysis. This methodology aims to investigate the what, who, and how directly from the participants' actual experiences (Creswell, 2014; Littzen-Brown, 2023; Gray, 2023). The descriptive method was

utilized to analyze portrayals of women as leaders in the stories of the Dayak Kanayatn ethnic group in West Kalimantan, employing a feminist literary criticism framework. Feminist literary criticism entails a critical examination of literary works, encompassing the writers, their ideologies, and the sociocultural conditions of the writings' creation (Hutabalian et al., 2022, p. 90). This framework elucidates the responsibilities and positions of women leaders as depicted in the oral traditions of the Dayak Kanayatn group.

The data collection methods were interviews, observation, and document analysis (Yin, 2016, p. 131). Subsequent to data collection, the data underwent validation through triangulation techniques. Triangulation was utilized to augment credibility and comprised source triangulation, investigator triangulation (when undertaken cooperatively), method triangulation, and theoretical triangulation (Denzin, 2017, p. 301).

The data analysis adhered to the qualitative data analysis framework established by Miles and Huberman (2014, p. 73), encompassing data condensation, data display, and the formulation and validation of findings. According to this paradigm, the precise analytical steps in this investigation were as follows: 1) Conversion of oral narratives into written format; 2) Identification of data concerning depictions of female leadership in the stories of the Dayak Kanayatn; 3) Analysis and presentation of data regarding the representation of female leaders to ascertain the role and importance of women within the sociocultural framework of the Dayak Kanayatn community; 4) Analyzing the portrayal and consequences of female leadership in cultural narratives.

The term Dayak'ng Langa denotes a female character in the legend. Consequently, in this article, all mentions of Dayak'ng Langa have been examined and amended to incorporate suitable feminine pronouns where relevant. The legend of Dayak'ng Langa narrates the tale of a revered Dayak Kanayatn lady who, by her skills and supernatural abilities, ascended to the position of pamaliatn (chief shaman). Her leadership and spiritual authority are crucial to the community's cultural memory. Redundancies or inconsistencies in previous drafts, such as repetitive descriptions or misgendering, have been amended to uphold academic rigor and clarity.

III. RESULT AND DISCUSSION

A. Result

Research revealed seven narratives that illustrate female leadership within the Dayak Kanayatn community of West Kalimantan. This is a comprehensive description of each narrative:

1. Dayak'ng Langa

The legend of Dayak'ng Langa narrates the tale of a Dayak Kanayatn woman known as Dayak'ng Langa. She is depicted as a formidable *Kepala Pamaliatn* (shamanic commander), celebrated for her extraordinary powers. Significantly, she was proficient in executing surgical procedures utilizing a conventional instrument referred to as *Nampak'ng*. Her exceptional qualities garnered significant respect and admiration from the community. As the principal shaman in her area, individuals regularly sought her aid for healing and spiritual counsel.

2. The Saga of Batu Marundo on Mount Tahakng

This mythology focuses on a Dayak Kanayatn character named Nek Tahakng, a humble and compassionate leader held in high esteem by her tribe. Her influence was so profound that people invariably adhered to her counsel. Nek Tahakng gained renown by safeguarding her village from enemy assaults by cleaving a rock wall on a hill to create a cave. The residents sought refuge indoors, and Nek Tahakng offered herself by transforming into stone to cover the cave's entrance. After this act of valor, she was never observed again. In commemoration of her sacrifice, the hill was designated Mount Tahakng.

3. Dayak'ng Sire

The tale of Dayak'ng Sire narrates the story of a female Dayak leader who had dual roles as a military commander and a Silat Kapong martial arts instructor. During the invasion of the Kingdom of Gunung Bawang, the male populace defended the frontiers, leaving the women and children behind. In response to the imminent danger, Dayak'ng Sire coordinated and instructed the women in martial arts. Upon the enemy's eventual assault, she commanded both female combatants and returning male soldiers into the fray. Under her leadership, the community effectively safeguarded its territory.

4. Dayak'ng Male'en

This legend narrates the narrative of Dayak'ng Male'en, a striking and gifted Dayak woman renowned within her society. She was renowned for her artistic talent and acknowledged for originating the Jonggan dance, an important cultural performance of the Dayak people. Notwithstanding numerous marriage proposals, she rejected all suitors. Her beauty and contributions to Dayak arts led to her name being immortalized in traditional melodies.

5. The Myth of the Three Nabo

The narrative of the Three Nabo chronicles the life of Queen Lina, a Dayak lady who governed the Kingdom of Pauh Janggi. She had three offspring named Nabo Calah, Nabo Kuning, and Nabo Ijo. The kingdom harbored precious treasures concealed beneath three hills: Bukit Raya (in Singkawang), Bukit Bawakng (in Bengkayang), and Bukit Pandan (in Landak). Nek Sawa's story states that local villagers confiscated these jewels. Furious, Queen Lina commanded her offspring to inundate the three regions. Nevertheless, nature did not allow this. The local spiritual

leaders, Pangalangok, Nek Sambara, and Nek Leong, spearheaded the resistance. During the subsequent war, Queen Lina's eldest offspring, Nabo Calah, was slain.

6. Dayak's Dinar

The mythology of Dayak'ng Dinar recounts the tale of a powerful and formidable woman. She wed Abakng Karohokng subsequent to his rescue of her pet white langur, who had been injured by a blowpipe. Nevertheless, four other men who coveted her grew envious and conspired to assassinate Abakng Karohokng. They invited him on a ngayau (headhunting expedition), and despite Dayak'ng Dinar's premonition of imminent peril, her father disregarded her apprehensions. Regrettably, her apprehensions were confirmed when her husband's decapitated head was returned. Furious, Dayak'ng Dinar adorned herself in her battle regalia, comprising a kapoa (ritual blouse), nongkekng tangkit (armor), and burayapm (weapon), and confronted the conspirators in battle. Renowned for her physical prowess and supernatural abilities, she independently vanquished three adversaries: Sule Sampayang Bakunikng Bayatn, Tongkor Tapakng, and Tongkor Labatn. She subsequently confronted Ore Nyabukng in an extended combat that involved the utilization of seven shields. Regrettably, she stumbled into a posthole, and at that instant, Ore Nyabukng fatally struck her with a sword. Dinar of the Dayak perished in combat, emblematic of valor and defiance.

7. Ria Sinir and Dara Itamp

The legend of Ria Sinir narrates the tumultuous love story between Ria Sinir and Dara Itamp, characterized by numerous challenges. Engaged since childhood, Ria Sinir presented Dara Itamp with a bamboo ring as a symbol of their commitment. Dara Itamp, a distinguished Kepala Baliatn (chief shaman), thereafter encountered Ria Sinir in the forest, where he had unintentionally struck her pet hornbill with a blowpipe. The recognition of the bamboo ring he had previously bestowed upon her revived their friendship. During a river bath, Dara Itamp's golden bowl, utilized for gathering her shed hair, was carried downstream and discovered by King Palang Pali. Upon discovering the identity of the bowl's owner, the king hatched a scheme to abduct her, pretending to be ill and enticing her on board his vessel, where she was transported to his palace to become his seventh wife. Dara Itamp consented on the condition that King Palang Pali procure the head of her father, who had been slain by Kayo Miaju.

Notwithstanding his endeavors, the king was unsuccessful in fulfilling the demanding tasks necessary to obtain the head. Dara Itamp ultimately disclosed that only Ria Sinir can achieve them. King Palang Pali sought the assistance of Ria Sinir, who consented on the stipulation that he might select one of the king's wives. Ria Sinir triumphed and selected Dara Itamp. Despite his hesitance, King Palang Pali fulfilled his commitment, resulting in the long-awaited reunion of Ria Sinir and Dara Itamp.

B. Discussion

Based on the findings obtained through in-depth interviews, participatory observation, and a documentary study of Dayak Kanayatn legends, it can be concluded that the construction of female leadership in local narratives is not merely symbolic but possesses a strong structural foundation within the community's belief system and cultural values. Female figures in legends, such as Sang Kumang and Padiang, and several others, are consistently portrayed as decision-makers, community protectors, and even revered spiritual rulers. These narratives do not depict women as complements to or subordinates of men, but rather as central figures with authority and social responsibility. Interestingly, these narratives remain alive in the community's oral traditions, although they are not extensively documented in writing. Analysis using a feminist literary criticism framework reveals that these legends implicitly contain resistance to patriarchal structures, albeit expressed in a manner contextual to the local culture. As explained by Hidayatullah et al. (2023), the feminist literary criticism approach enables the revelation of strong and empowered female imagery in regional oral literature. Thus, the results of this study demonstrate that the interpretation of female leaders in Dayak Kanayatn culture is far more progressive than has been portrayed in conventional anthropological literature. These findings also show that women are not only present in the domestic sphere but also serve as guardians of collective values, spiritual intermediaries, and symbols of community stability. This suggests the presence of a local value framework and cosmology that values feminine leadership as integral to social harmony. Therefore, through the feminist literary criticism approach, the narrative structure of legends becomes a crucial tool for re-examining power relations and gender identity in indigenous communities, while simultaneously opening new possibilities for a more equitable and contextual understanding of women's roles in traditional Indonesian societies.

When compared to previous studies on women and leadership in indigenous societies, the results of this research indicate significant differentiation in both approach and findings. Several prior studies, such as those conducted within the realms of social anthropology among the Toraja and Baduy indigenous communities, tend to position women as symbolic figures or guardians of tradition, yet rarely place them as holders of structural authority in cultural narratives (Habsari & Wina, 2017). Meanwhile, feminist approaches in literature generally focus on modern and urban works, thus seldom addressing the social dynamics present in indigenous communities, such as the Dayak Kanayatn. The strength of this study lies in its ability to bridge two approaches: ethnographic methods and the feminist literary criticism framework, thereby opening a more comprehensive analytical space for cultural texts as ideological representations of society. Unlike other studies that emphasize cultural description or universal text analysis, this study instead explores local specificity as an analytical strength.

Furthermore, the results of this study show that in the context of the Dayak Kanayatn, female leadership is not reactive to patriarchal pressures but is inherent in the developed value system (Diana et al., 2018). This means there is

no sharp dichotomy between the feminine and masculine in the social structure; instead, they operate in a complementary manner within a symmetrical framework. This distinguishes the findings of this study from previous ones, which tend to frame women's struggles as a response to structural oppression. In the Dayak Kanayatn context, it is evident that women have long played leadership roles organically in both narrative and community life. Thus, the contribution of this research is significant as it not only expands feminist discourse in a local context but also challenges universal assumptions regarding gender roles in traditional societies.

These findings reflect the importance of deconstructing dominant narratives that have shaped our understanding of leadership and gender in indigenous societies. Reflection on these findings suggests that Dayak Kanayatn legends are not merely folklore, but rather reflections of ideological values that reinforce the existence of women as leaders. This is directly related to the research objective, which is to describe the representation of female leaders in Dayak Kanayatn legends through feminist literary criticism. During the analysis process, an awareness emerged that folklore serves a function not only as a preserver of culture but also as a discursive space influencing how society perceives power relations between men and women. As suggested by Indrastuti (2017), folklore can serve as a means to motivate, strengthen, and remind people of positive values in the face of globalization's challenges. Therefore, the benefit of this research becomes increasingly apparent: it not only offers an alternative narrative about female leadership but also demonstrates that egalitarian values have long been present in Indonesian local cultures. This serves as an important correction to the view that feminism must always take a confrontational stance towards traditional culture. On the contrary, in this context, feminist values have long been internalized within the social system without the need for open conflict, but through powerful symbolism and narrative structures. This reflection brings a new awareness that approaches to women's studies should not always stem from modern-traditional or Western-local dichotomies. However, it must be able to understand the internal dynamics of the culture itself. Consequently, this research has epistemological benefits, namely, enriching our scientific understanding of how gender identities and roles are represented contextually in indigenous societies, as well as practical benefits in formulating cultural preservation strategies that are more sensitive to gender equality issues.

The implications of these findings are broad, extending not only to the academic level but also to the realms of cultural policy and women's empowerment at the local level. From a scholarly perspective, these findings reinforce the importance of an interdisciplinary approach to understanding complex socio-cultural phenomena, particularly in bridging literary texts and the social reality from which they emerge. The discovery that women in Dayak Kanayatn legends serve as spiritual leaders, guardians of collective morality, and central figures in community decision-making suggests that local narratives can serve as a reference source for developing inclusive and gender-equitable leadership models. This aligns with findings showing that women play a vital role in preserving and promoting cultural heritage, acting as custodians of tradition, language, rituals, and artistic expressions (Rita & Kumar, 2024). Another implication lies in the role of local governments and cultural institutions, which should begin to recognize that local cultural heritage contains not only aesthetic or historical value but also emancipatory values that can be incorporated into women's empowerment programs. In the context of education, these findings can be integrated into local curricula that teach the importance of gender equality through the study of folklore and local culture. Research indicates that integrating local cultural values into early childhood education significantly enhances character building, emphasizing children's direct experience and active participation in local cultural activities (Sakti et al., 2024).

Furthermore, this research also implies a more participatory cultural preservation strategy, where women are involved not only as inheritors but also as primary actors in preserving cultural values. On a broader scale, these findings can serve as advocacy material for gender mainstreaming in local wisdom-based development policies. Therefore, this research is not only relevant to the academic sphere but also possesses a transformational dimension, as it formulates concrete steps to create a more gender-equitable society that respects cultural diversity.

The construction of the representation of women as leaders in Dayak Kanayatn legends does not occur by chance. However, it is a result of cosmological structures and value systems deeply rooted in the community's life. In the Dayak Kanayatn context, the concept of balance between masculine and feminine elements is not only spiritually believed but also manifested in tangible social and symbolic structures. Female figures in legends are not merely individual representations but symbols of values such as courage, wisdom, and the protection of life, which are believed to be feminine aspects in the Dayak worldview (Astono et al., 2024). Analysis of the legends' narrative structure reveals that the position of women as leaders is possible due to a holistic understanding of women's roles in maintaining balance between humans and nature, as well as between the real world and the spiritual world (Siregar, 2023). This differs from the patriarchal paradigm that separates power from the values of empathy or spirituality. Therefore, these findings cannot be separated from the context of local cultural values that place women in important positions, not due to quotas or external pressure, but because of their integration into a value system that organically acknowledges their existence and contribution.

Additionally, it is essential to note that in indigenous societies not entirely influenced by modernization, local values hold significantly more influence compared to formal external norms. This explains why narratives of female leaders remain preserved and respected in legends, even if they are not always reflected in formal governance structures (Dinas Perpustakaan dan Kearsipan Provinsi Kalimantan Timur, 2020). In conclusion, these findings are shaped by a harmony

between spiritual, social, and narrative values that provide an authentic space for women to emerge as leaders within the cultural system of the Dayak Kanayatn people.

Based on the results and analysis presented, several concrete action steps need to be formulated to ensure that the narrative of women's leadership in Dayak Kanayatn culture extends beyond the academic level, also having a social and cultural impact. First, it is crucial to conduct systematic documentation of local legends that contain narratives about female leaders. This documentation should not only be in written form but also through audiovisual media to preserve the authenticity of the narrative and cultural expressions. This approach aligns with efforts to preserve local culture through documentation and socialization involving the younger generation and the wider community (Dewi, 2022). Second, it is necessary to initiate training and empowerment programs based on local values, specifically targeting young Dayak women, so that they can recognize their cultural heritage as a source of strength and inspiration for leadership. Local wisdom-based training has proven effective in enhancing women's roles in supporting family economies and cultural preservation (Kikky, 2020). Third, the findings of this research should be disseminated to local governments, customary institutions, and local educational institutions to inform policy formulation and curriculum development. The socialization of the role of customary institutions in resolving social problems has led to an increase in public understanding of the importance of preserving local wisdom (Rahmawan, 2024).

Fourth, cross-sectoral collaboration among academics, cultural practitioners, and gender activists should be established to develop local, wisdom-based leadership models that are inclusive of gender. This collaboration can strengthen women's roles in cultural preservation and the development of indigenous communities. Furthermore, another important action is to encourage further research exploring similar narratives in other indigenous communities, thereby forming a network of knowledge that mutually enriches the understanding of women's roles in Indonesian culture. Research on the role of women in customary systems across various regions has provided valuable insights into women's participation in cultural preservation and community leadership (Lemhannas RI, 2023). These actions are not only for preserving cultural values but also for shaping a new paradigm that views women as leaders based on their own cultural roots, rather than merely adhering to Western modernity standards. Thus, the results of this research are not only informative but also transformative, encouraging a shift in perspectives and social practices towards greater equity, rooted in the nation's cultural wealth (Baidawi dan Dewi, 2019).

IV. CONCLUSION

Women's leadership in indigenous communities is frequently overlooked in public discourse and academic research, especially among local groups like the Dayak Kanayatn in West Kalimantan. This community is recognized for its intricate social hierarchy and profound indigenous knowledge; nonetheless, accounts of women in leadership positions are seldom recorded systematically.

This study's findings indicate that the perception of female leadership in Dayak Kanayatn society is considerably more advanced than traditionally portrayed in anthropological literature. The findings indicate that women are not limited to the domestic realm; they also serve as guardians of social ideals, spiritual mediators, and emblems of communal security. This signifies the existence of a local value system and cosmology that respects feminine leadership as a vital element of social peace. The findings and analysis indicate that specific steps are essential to ensure that the discussion on female leadership in Dayak Kanayatn culture transcends academic confines and generates meaningful social and cultural effects. It is imperative to record local tales that feature narratives of female leaders thoroughly. Secondly, training and empowerment initiatives grounded in local values should be implemented, particularly aimed at young Dayak women, enabling them to perceive their cultural history as a wellspring of strength and leadership motivation. The findings of this research should be communicated to local governments, traditional institutions, and educational organizations to guide policy formulation and curriculum design. Fourth, collaboration across sectors involving academics, cultural practitioners, and gender activists is essential to formulate a gender-inclusive leadership model grounded in local understanding.

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Livestock Symbolism in Jordanian Popular Proverbs: A Semiotic Analysis

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Abstract—This paper explores the semiotic representations of livestock in Jordanian proverbs. Specifically, it examines the cultural and symbolic meanings of these proverbial expressions. To this end, livestock-related proverbs were collected from two popular books written about proverbs in Jordanian culture. Barthes' (1957) semiotic theory was adopted to analyze the data of the study. The findings have revealed that livestock are used in the Jordanian proverbs to signify both positive and negative meanings, traits, and values. This study has identified the following positive traits in the data: distinguished status, skill, uniqueness, strength, endurance and patience. It has also revealed the following negative traits: worthlessness, poor judgment, foolishness, laziness, mockery, stubbornness, baseness, submissiveness, bad taste, and resentment. The findings have shown that livestock-related proverbs express more pejorative connotations than positive ones. The study supports previous literature that animal proverbs are culture-specific, and their meanings depend on the context in which they are used.

Index Terms—livestock, proverbs, Jordanian Arabic, applied linguistics, semiotics

I. INTRODUCTION

Proverbs, or proverbial expressions, are the mirror of societies. They reflect their wisdom, values, traditions, and teachings in concise, expressive, and memorable expressions (Honeck, 1997; Meider, 2004). They are a common feature of every language and culture, and people use them subconsciously to communicate emotions, attitudes, and opinions (Al Rousan & Shatnawi, 2023). Proverbs are vital to societies' linguistic and cultural mosaic. One way to understand a culture is to study its proverbs and sayings (Yusopova & Kazmina, 2015). In Jordan, as is the case in other societies, proverbs are used as a medium to convey social norms, moral values, and aspects of relationships. Proverbs cover almost all aspects of life in Jordan. One of the important topics that are represented by Jordanian proverbs is livestock, which holds a special place in Jordanian culture because of its historical, cultural, and socio-economic significance.

Animals have influenced our lives since the beginning of humanity (Alster, 1993). They have played an important part in our folklore, myths, and superstitions (Mieder, 2004). The relationship between humans and animals has been so strong throughout history (Rayan et al., 2024). Animals have been people's friends, companions, and enemies; they have helped in shaping their emotions, views, attitudes, and values. For many generations, people have been observing animals, studying their habits and character, and applying this competence to clearly describe people's negative and positive aspects (Yusopova & Kazmina, 2015). Therefore, studying the connection between human beings and animals is essential both culturally and linguistically. Livestock are one type of animal whose impact on different angles of human lives is worth investigating. For centuries, livestock has been vital to Jordan's agrarian and nomadic lifestyles. They have played a crucial role in labour, trade, sustenance, and social status (Zawahreh, 2022). Therefore, their portrayal in Jordanian proverbs shows their practical and symbolic significance within Jordanian society. This study investigates how livestock is represented in Jordanian proverbial expressions as symbols of values and traits. Such images offer invaluable insights into Jordanian societal norms and values.

Drawing on Barthes' (1957) theory of semiotics, investigating Jordanian animal proverbs deepens our understanding of how language creates and conveys meaning. By examining the linguistic and cultural aspects of livestock-related proverbs in Jordanian culture, our study looks into how Jordanian people view their relationship with livestock, dealing

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with them as a practical necessity and linguistic and cultural metaphors. This paper explores the semiotic representation of livestock in Jordanian proverbs; it aims to unveil the cultural, social, and symbolic meanings entrenched in these proverbial expressions. This study contributes to the growing body of research on the representations of animals, particularly livestock, in folklore, specifically Arabic and Jordanian folklore. It will reveal the livestock's cultural value in Jordanian society and show how semiotics is utilized to analyze meaning on linguistic and cultural levels.

II. LITERATURE REVIEW

A. *Origin and Definition of Proverbs*

The origin of proverbs, which belongs to phraseology is still unknown (Marvin, 1922; Dominguez, 2006). They are as old as the beginning of human's clear thinking (Honeck, 1997). The originality of proverbs is attributed to those who first brought them up and used them (Mieder, 2004). Mieder (2004) also argued that proverbs have enjoyed high status and great value across the ancient world until this day. This implies that the founder of any proverb is hardly ever known. Alster (1993) pointed out that animal proverbs are almost 4000 years old, the oldest of which shows the frequent use of animal imagery to portray human beings. This fact may suggest that proverbs involving animals to depict human characteristics are a universal phenomenon whose purpose is to implicitly convey human wisdom. Animal proverbs express positive and negative connotations based on the linguistic and cultural context in which they occur (Mieder, 2004; Yusopova & Kazmina, 2015; Al Rousan & Shatnawi, 2023). The metaphorical transfers from the animal domain to the human domain can be found in any language, culture, or language (Dominguez, 2006).

Although scholars such as Norrick (1985), Hernadi and Steen (1999), and Mieder (2004) have admitted to the challenge of constructing a comprehensive definition for proverbs, they offered some definitions which cannot be regarded as ultimate ones. For example, Norrick (1985) stated that a proverb is "a traditional, conversational, didactic genre with a general meaning, a potential free conversational turn, preferably with figurative meaning". On the other hand, Hernadi and Steen (1999, p. 7) defined them as "brief, memorable, and intuitively convincing formulations of socially sanctioned advice". For Hagos (2015), proverbs are traditional sayings humans founded to transfer experience, knowledge, wisdom, and culture from one generation to another. In sum, they are philosophical expressions about some aspect of people's lives.

B. *Characteristics of Proverbs*

According to scholars (Norrick, 1985; Hernadi & Steen, 1999; Aasland, 2012; Umidjanovna, 2020; Umarova, 2022), proverbs enjoy the following main characteristics. Firstly, they are fixed, complete grammatical units that resist change, which make them distinct from other language structures. Secondly, they are a feature of colloquial speech and can be realized in different forms and contexts (Ilyassova et al., 2019). Thirdly, proverbs are pre-formulated and pre-fabricated generalized expressions. That is, their interpretation does not rely on a specific textual context. Fourthly, all cultures highly value proverbs because they are didactic and edifying (Norrick, 1985). Fifthly, proverbs are easy to memorize because their structure and metaphorical language are not complicated. Rhetorical devices, such as rhythm, rhyme, and alliteration, are primary features of a proverb, making it comprehensible and easy to remember and transfer. Furthermore, proverbs are traditional collective human experience and wisdom used as moral teaching. They are also situational, poly-functional and poly-semantic, making them semantically indefinite. Moreover, proverbs are described as creative elements of language that describe some state of affairs by comparison. According to Krikmann (2001, p. 11), "the semantic field of animals must be the most productive in proverbial metaphors". Furthermore, proverbial expressions often communicate general meanings rather than specific ones (Norrick, 1985). That is why they are often expressed in the present tense. Finally, wisdom and brevity are what make up a proverb. All of the above-mentioned characteristics make proverbs practical to use in everyday interactions.

C. *Functions of Proverbs*

Proverbs are a universal phenomenon reflecting the relationship between people and their traits, actions, views, experiences, and traditions. Mieder (2004) claimed that proverbs can be found in most of the world's cultures, although with different frequencies. Almost every aspect of human life has been expressed in a condensed proverbial form, calling them "frames unveiling a world-view" (Gordon, 1968). Sibarani (2004) indicated that proverbs express the views and characteristics of a culture; they also emphasize its tradition and folklore by means of language. In Utebaev and Sarsenbaeva's (2023, p. 10) own words, "proverbs express the experience of the nations, reflecting their history, way of life, culture, and development." According to Mieder (2004, p. 1), "proverbs fulfil the human need to summarize experiences and observations into nuggets of wisdom that provide readymade comments on personal relationships and social affairs". Proverbs also have literary and practical functions (Honeck, 1997), which indicates that they can be used in prose, songs, and poetry. Proverbs, which result from people's lifelong and well-established experiences, are a mere reflection of their history, development, culture, and way of life (Utebaev & Sarsenbaeva, 2023). Proverbs describe man "with all his virtues and flaws" (Blaga, 2003, p. 312).

D. *Livestock in Jordanian Culture*

In Western culture, livestock or farm animals include mainly cattle, sheep, pigs, goats, cows, horses, donkeys, mules, camels, bulls, buffalos, or llamas (Britannica. com). Except for buffalo, pigs, and llamas, other animals dominate in the agrarian and nomadic areas of Arab culture, specifically Jordanian culture. This study focuses on livestock, excluding pigs, buffalos, and llamas, which are non-existent in Jordan. Some wild or domestic animals have been an important source of people's livelihood (Yusopova & Kazmina, 2015). For example, livestock is a vital source of food and income for many individuals and families around the globe. In Jordan, low-income families rely heavily on livestock to survive by selling their meat, dairy, wool, and skin, offering them a steady source of income (Zawahreh, 2022). That is why livestock holds significant importance in rural and Bedouin communities in Jordan. One clear evidence is Jordan's outstanding stock of sheep, goats, cattle, camels, and others. There is a strong, well-established connection between the Jordanian people and livestock. Based on such a relationship, this study symbolically examines this class of animals to reveal the details of this relationship, both linguistically and culturally. Particularly, this relationship reflects the expressive articulation of popular proverbs in Jordanian Culture, which provide insight into how Jordanians experience joy, pride, emotions, and concerns. Moreover, this study explains the connection between proverbs and human traits in Jordanian society. This study focuses on livestock because of their significance, role, and status in Jordanian culture.

E. Previous Studies

The linguistic and cultural study of animal proverbs has been a topic of interest for many scholars in different parts of the world (Domínguez, 2006; Rodriguez, 2009; Nakhavali, 2011; Yinggang & Xuena, 2015; Yusupova & Kazmina 2015; Al-Harashsheh & Al-Rousan, 2020; Rayyan et al., 2023). Domínguez (2006) examined the metaphorical use of animal names in describing various human aspects, including physical and mental traits, body parts, secretions, illnesses, and actions, often with derogatory connotations. While most animal-based terms were offensive, only a few lacked pejorative meanings. The study analyzes Polish and Spanish data. He categorized animal names into the following subclasses: physical features, sexuality, character traits, social groups, occupations, and human conditions. Rodriguez (2009) explored the figurative use of animal names for women in English and Spanish, highlighting their often negative connotations. Women are commonly compared to pets, farm animals, and wild animals. Pet names imply ugliness, promiscuity, or cruelty, though they can also suggest domesticity. Farm animal metaphors vary between praise and insult, while wild animal imagery is predominantly derogatory, with "crow" used in both languages to describe an old or unattractive woman. Studying animal names in Persian and English, Nakhavali (2011) pointed out that animal names, which serve significant functions in society, are highly dependent on human relations and culture. These names carry different connotations in different cultures based on the context in which they are used. Animal names convey social behaviours and social roles. In their study of the cultural significance of Chinese and English animal names, Yinggang and Xuena (2015) argued that animal expressions can have similar or identical connotations in both languages. They also reported that the same animal name can be associated with a negative connotation in one culture and a positive connotation in another. Yusupova and Kazmina (2015) studied domestic animal names in the proverbs of three unrelated languages: Russian, German and Tatar. Their findings show that proverbs with the names of domestic animals sometimes carry the same connotative connotation, which is mostly pejorative, in all three languages. However, they may have different meanings based on the situation of talk. The following pejorative connotations were identified in the proverbs of these languages: stupidity, ignorance, laziness, cowardice, and greed.

Some scholars have studied the connotations of animal names in Arabic, such as Al-Harashsheh and Al Rousan (2020), Rayyan et al. (2023), and Al-Rabee and Al Khanji (2024). Al-Harashsheh and Al- Rousan (2020) explored the topic of people addressed using animal names in Jordanian society. Their findings show that in Jordanian culture, animal names are assigned to people based on four factors: appearance, behaviour, intelligence, and character. Rayyan et al. (2023) examined the connotative meanings of animal names in Algerian society using a questionnaire with 20 common animal names. The qualitative analysis reveals that animal names convey varied meanings depending on context, beliefs, and personal perceptions. Some names are gender-specific, while others apply to both genders. These names are associated with physical appearance, size, and character and serve semantic, pragmatic, and sociolinguistic functions. Ultimately, the use of animal names expresses Algerian cultural diversity and helps shape social interactions. Having looked at the diverse research of animal names, this review of previous studies establishes some rigid foundation for the semiotic analysis of livestock in Jordanian proverbs, focusing on the relationship between linguistic expressions and cultural meaning. Al-Rabee' and Al Khanji (2024), who studied the meanings conveyed by the wolf and sheep in Arabic and English, revealed that both animals conveyed meanings specific to human beings, and that such meanings are common in both languages' proverbs. The survey of previous literature indicates the lack of studies conducted on livestock in proverbs in the Arab setting, particularly in Jordan.

F. Barthes' Semiotic Theory

Ronald Barthes' (1957) semiotic (or semiology) theory, which was built on Ferdinand de Saussure's sign theory, proposes that a sign is "combination of its signifier and signified" (Griffin et al., 2012, p. 333). To illustrate, a sign comprises a signifier (word, sound, image, etc.), and a signified (their meanings). Semiology or semiotics is the science of interpreting signs, and it is "concerned with anything that can stand for something else" (Barthes, 1988, p. 326). Semiotics also proposes that a sign has its denotation and connotation. The denotation of a sign is its literal or dictionary meaning (the word/image "horse" denotes a large solid-hoofed domesticated mammal); and this denotation signifies

connotation (i.e., what is associated with the word or image of a horse, such as strength or beauty). Barthes' theory also suggests that denotations and connotations are arranged into ideological meaning, called myth. It also postulates that the signified is represented metaphorically by the signifier. This theory offers an important window to comprehend the symbolic and cultural significance of livestock in Jordanian proverbs. According to this theory, the proverbs in our study can be viewed as a mythological construct that encodes our cultural meanings and values. In the study of livestock-related proverbs in Jordan, livestock serve as a signifier (denoting their shapes, sizes, habits and their socio-economic role), and signified at the same time (connoting broader associative meanings, like strength, wealth, status, etc.) For instance, a proverb depicting a mule as "stubborn" may literally describe the behavior of this animal, but may metaphorically criticize a person as being obstinate and hard to change. Barthes' theory can show how proverbs employ cultural symbols to express complex thoughts, attitudes, and ideas. This theory, although somewhat old, still hold a great value as the two levels introduced by Barthes (denotation and connotation) cannot be bound by time. This theory is also highly interested in how culture builds meaning which is also boundless. Cultures have been constructing meaning and they will continue doing so.

III. METHODS

This study is primarily a descriptive qualitative analysis of livestock-related proverbs in Jordan. However, it uses some quantitative data to support its analysis. We have confined our study to this group of animals because the number of animal proverbs in Jordanian Arabic is large, which makes it hard to explore them all in one study.

A. Data Collection

The data were extracted from two published books about Jordanian proverbs: Al-Amad's (1987) *Jordanian Popular Proverbs* and Alazizi's (2004) *Dictionary of Jordanian Customs, Dialects and Unusual Things*. They are among the most widely referenced books on popular folkloric proverbs in Jordanian culture. They also have excellent potential as repositories of proverbs and their meaning. Another data collection method used in the study was a survey test distributed among ten Jordanian people to elicit livestock-related proverbs from Jordanian folklore. The participants were asked to provide the authors with livestock-related proverbs they are familiar with. They provided forty- six proverbs, from which 9 were excluded either because they were unrelated to livestock or because they were not proverbs. The other thirty- seven proverbs were similar to those sourced from the books. A total of two hundred and thirteen proverbs related to livestock were collected and used in this study.

B. Data Analysis

This study adopted Barthes' (1957) semiotic theory as a guide for its data analysis. It also used Braun and Clarke's (2006) thematic analysis approach. We analyzed the relationship between the animal and human domains while investigating the meanings and messages communicated by the livestock-related proverbs. The meanings expressed by the livestock in the proverbs were first classified into categories of negative and positive connotations or values. Under each one of these two categories, sub-thematic categories representing the main themes were presented. The authors simultaneously conducted the data analysis. To validate the meanings expressed in the proverbs, the authors held a discussion group with six native Jordanians between 50 and 70 years old. This group were quite familiar with the use of proverbs in Jordanian Arabic. They were all friends and family members of the authors. The authors would give them the proverb and ask about its meaning and usage. The group discussion occurred in a friendly atmosphere.

IV. FINDINGS AND DISCUSSION

The data analysis shows that livestock-related proverbs in Jordanian culture can express both positive and negative cultural meanings and values. In the subsequent sections, these proverbs are classified into two main categories: positive traits and negative traits. Each category is further sub-classified into a number of related traits and qualities. Illustrative examples representing each category were selected randomly for discussion purposes.

A. Positive Traits

The analysis of the proverbs revealed positive symbolism for the livestock they use. The positive traits represented by livestock in Jordanian proverbs were categorized into the meanings and values shown in Table 1 below:

TABLE 1
POSITIVE TRAITS EXPRESSED BY LIVESTOCK IN JORDANIAN PROVERBS

<i>Animal</i> <i>Traits</i>	<i>Horse</i>	<i>Camel</i>	<i>Cow/bull</i>	<i>Sheep/ Goat</i>	<i>Donkey</i>	<i>Mule</i>	<i>Total</i>
Distinguished Status	11	9	4	----	1	1	26
Skill	8	1	2	----	1	----	12
Uniqueness	4	----	1	5	----	----	10
Strength	2	6	----	----	----	1	9
Patience and Endurance	1	1	----	1	3	3	9
Total	26	17	7	6	5	5	66

(a). *Distinguished Status*

Certain animals, such as the camel and horse, have held a prominent position in Jordanian society as indicated by their recognized status and positive aspects associated with them in popular Jordanian proverbs. The purpose of these proverbs is not to praise these animals but to communicate a more profound meaning by alluding to the positive values inherited in society. The camel has held a deep-rooted value in peoples' lives, particularly in the Arab world (Al-Maalouf, 1985). Thus, a strong relationship has been established between Arabs and the camel. This kind of relationship is derived from the camel's unique traits, which enable it to endure a hot and arid environment. That is why it is called "the ship of the desert".

For example, Jordanians praised the camel, as in the proverb *إن عشقت عشق قمر، وإن سرقت اسرق جمل* / 'in i' shiqt, i' shag gamar, win saragt, isrig jamal/ "if you love, love a moon; if you steal, steal a camel." The signifiers in this proverb are the "moon" and the "camel", whereas the signified are the "moon's prominent place and the camel's high status". The proverb implies that if theft must occur, it should target something of great worth. It also urges people to aim for the highest in love and ambition. On the cultural level, this proverb criticizes those who cannot recognize the true value of things because of their weak evaluation and poor judgment.

This positive value has also appeared in the following proverb describing noble women, *مأصلة زي الفرس الأصيلة* /ma'sala zay il-faras il-'ašīlih/ "She is as noble as a genuine horse". In this proverb, the signifier is the "horse" and the signified is "the nobility feature of horses". Horses have several important features that the Arabs praised. Horses are characterized by strength, speed, beauty, and nobility. Accordingly, a girl known for good conduct is compared to horse of a genuine pedigree that symbolizes beauty, obedience, and nobility. The proverb highlights the importance of high status as an extremely positive value in Jordanian society.

(b). *Skill*

Some animals are strongly associated with extraordinary skills in Jordanian proverbs such as *اللي ما بقدر ع الفرس وعليقها* /illi ma bigdar 'al-faras w-'alīgha b-jannib 'an ṭarīqha/ "He who cannot handle a horse and its brambles should stay out of its way". The "horse" and "its brambles" symbolize the meaning of "having the skill to handle a difficult situation". This proverb emphasizes the importance of having the skill to handle a horse in battles, and those who lack the necessary skills to do so should step aside. Additionally, those who cannot face challenges or hold responsibilities should not get involved. Culture-wise, this proverb conforms to Arab wisdom that leadership and commitment are only for skilled and prepared people.

The camel also has his share of this positive value in the Jordanian proverbs. It is symbolized by some proverbs as experienced and professional in handling matters, as in *ماحد بيصرف وين يحط رجله غير الجمل* /maḥad bi'raf wēn yihṭ rijluh ghēr il-jamal/ "Only the camel knows where to tread." Denotatively, this proverb means that only the camel, because of its unique skills and abilities, knows when and where to step in a challenging situation. "Camels" signify "experience and skill" as they are well-familiar with the desert landscapes and the best places to place their feet. This saying suggests that personal experience and skills are very important in making successful decisions in life. It is a semiotic structure that emphasizes cultural values of expertise, skill, knowledge, and self-reliance.

(c). *Uniqueness*

Uniqueness is a positive value depicted in the data, emphasizing that only certain livestock can perform specific actions better than others. These livestock include calf, camel, sheep, and goat. For example, calves, the offspring of a cow, are used in proverbs to symbolize self-reliance. The proverb *ما بخزث لبلاد الا عجلها* /ma biḥruth li-blād illā 'jūlha/ "No one ploughs the land better than its calves" semantically means that no one can serve the country better than its people. This proverb highlights citizens' loyalty, skill and responsibility to contribute to their country's prosperity. From a cultural perspective, this proverb expresses the wisdom that those raised in a land are best suited to work in it and that outside interference to control a land is refused.

Jordanian proverbs have also assigned a positive value of uniqueness to sheep, depicting them as symbols of distinct intelligence. For example, the proverb: *مثل الجدي يرضع من فوق اللجام* /mithl il-jidy yirḍa' min fūq ilijām/ "Like a buckling sucking from above the bridle," is used for someone who is out of control. The "buckling" and "bridle" are the signifiers, and the signified is "the cleverness of children in their early years"; they learn things even before they mature. Semantically, this proverb shows some children's distinction and superiority over their peers in comprehending issues and their meanings. On a cultural level, the proverb warns against the rebellion of some children in their situations because they understand what is going on around them without boundaries, perceiving matters with maturity and awareness.

(d). *Strength*

Another positive quality represented by animal proverbs in Jordanian culture is strength. This value is symbolized by animals like the horse and the camel, for example, *فلان ينح جمل يقوم جمل* /fulān yinikh jamal ygūm jamal/ "So-and-so kneels like a camel and rises like one". This proverb portrays the camel as a symbol of strength, power, and resilience, highlighting its ability to bear and do hard work. Semantically, the proverb depicts strength and resilience in certain men, "a man behaves like a man in all situations". In Jordanian culture, a person may be compared to a camel in this way to emphasize their ability to prevail through tough situations.

Jordanian proverbs also portray the camel as a formidable opponent. For example, they say *اللي ما يقدر ع الجمل يعض البردعه* /'ili ma yi'dar 'a-l-jamal yi'uḍ il-barda'a/ "If you cannot take on the camel, you bite the saddle". The "camel" and "saddle" signify "the powerless entity that cannot challenge a stronger opponent", so instead, they direct their anger against the weak. This is akin to the English proverb, "If you cannot fight the lion, you kick the cub." This proverb stresses the power of a man whose dignity cannot be undermined, often leading to baseless accusations against him. In Jordanian culture, this proverb aims to deter anyone who dares to challenge strong and resilient individuals because such challenges are a waste of time.

(e). *Patience and Endurance*

Endurance is expressed in the proverbs portraying the camel, bull, and sheep. The camel in Jordanian culture is regarded as a symbol of endurance. A man who can bear hardships and endure them is referred to as *جمل المحامل* / jamal il-maḥāmīl/ "The camel of all burdens". The signifier here is the "camel", and the signified is "a man enduring heavy burdens, enduring huge responsibilities, being relied on by people and facing challenges with patience". This proverb presents a unique image of a man's endurance and patience, just like the camel. Culturally, Bedouins, in particular, hold a great value for the camels, which stems from their ability to carry heavy loads and endure long journeys. Thus, this proverb emphasizes endurance as a noble value essential for societal harmony. It also signifies admiration and praise for unselfish, giving, and enduring people.

Among the animals associated with this positive trait is also the bull. One proverb states that *ما بُصْبِرْ ع الجور الا الثور* /ma buṣbur 'al-jūr illā i-thūr/ "Only the bull endures oppression with patience". The "bull" signifies "a person who patiently endures hardships". Semantically, the proverb illustrates the ability of some men to endure and remain patient through hard and exhausting life situations. This proverb praises strong individuals who withstand hardships with patience. It also empowers patient men to lead matters successfully, as patience and endurance are considered great values essential for our well-being.

B. *Negative Traits*

The findings show that livestock- related proverbs express several negative connotations. These proverbs often criticize negative traits in Jordanian society by symbolically associating them to certain animals, representing individuals who exhibit these characteristics. These negative qualities are classified into the categories shown in Table 2:

TABLE 2
NEGATIVE TRAITS EXPRESSED BY LIVESTOCK IN JORDANIAN PROVERBS

Animal Trait	Camel	Horse	Cow/bull	Sheep/ Goat	Donkey	Mule	Total
Worthlessness	2	5	5	2	14	-----	28
Poor judgment	9	2	3	5	7	2	28
Foolishness	4	1	5	5	6	3	24
Laziness	8	1	4	1	2	----	16
Mockery	----	1	2	4	5	-----	12
Stubbornness	1	-----	1	1	2	5	10
Baseness	1	----	1	----	5	2	9
Submissiveness	1	----	----	2	4	2	9
Bad taste	3	----	----	2	2	----	7
Resentment	1	----	2	----	----	1	4
Total	30	10	23	22	47	15	147

(a). *Worthlessness*

The findings show that livestock can be associated with worthlessness in some proverbs. These negative livestock proverbs are used to criticize actions and behaviours done by some Jordanians. The negative image of the horse in Jordanian proverbs is almost rare, except in some horses, which are considered inferior in ability and status. They are described in some proverbs as *مِثْلُ حَصَانِ الْحَمَاشِيِّ يَصْنَعُ بِلَا فَايْدَةٍ* /mithl iḥṣān il-ḥamāshī yiṣḥal bala fāyḍih/ "Like the Hamashi's horse, it neighs to no avail." The signifier here is the "hamashi's horse", and the signified is 'nothing but talk'. The proverb describes individuals who talk, complain, and brag but perform no actions. On the cultural level, the proverb criticizes people who put so much effort into their work without being productive. It also urges people to perform tasks silently because Jordanians favour action over talk. This proverb advises the Jordanian elderly to young generations to be committed, reliable, and productive.

The donkey has also been portrayed as being worthless in Jordanian culture. The donkey mainly holds low value in Jordanian proverbs, as it represents failure, dumbness, and laziness; for example, *يَا مَرْحَبًا بِالْحَمَارِ طَلَّنْ أَذَانُ جَوْشُهُ* /Yā marḥabā bil-ḥmār ṭalln 'adhān jhūshuh/ "Welcome the donkey whose big ears have surfaced". The signifiers in this proverb are the "donkey" and its "big ears", which signify "stupidity, foolishness, and failure". The donkey's ears cannot go unnoticed because they are big, making them a symbol for something undeniable. The phrase "have surfaced"

implies that the presence of trouble, foolishness, that are very hard to deny. This proverb suggests that individuals should contribute to the well-being of their society, not like a donkey who never achieved anything successfully.

(b). *Poor Judgment*

Some of these animals are associated with poor judgment. In this regard, Jordanian proverbs show a negative image of the camel, describing it as a reckless and disorganized animal; for instance, *زَي اِحْرَاثُ الْجَمَالِ الّٰلِي بِتَحْرُثُهُ تُدْبِكُهُ* /zay iħrāth li-jmāl ily btuħruth tudubukh/ "Like a camel's ploughing - what it furrows, it tramples." In this proverb, the "camel" and the "trampling" represent a "reckless person who destroys what they have established", much like the camel that ploughs the land and then tramples on it, destroying their work. The Jordanian society criticizes those who lack reasoning and precision in performing their job, encouraging them to have management, care, and wisdom in doing their tasks.

Cows have also received their share of criticism in Jordanian proverbs, linking them to destruction and poor judgment. For example, the proverb *التَّمِ الْاَعْوَجُ مِنَ الثَّوْرِ الْكَبِيرِ* /it-tilim il-'awağ min ith-thūr il-kabīr/ "The ruined bend comes from the big bull." is used to indicate that a major mistake can come from a person in authority and power. The bend is a straight line left by a plough in the ground. The signifiers are the "bend" and the "bull", which may signify "mistakes" and "people in power", respectively. Culturally, the proverb depicts those in power who, instead of correcting problems, complicate things and cause more harm and destruction. It may also show that the powerful forces in society, such as "bulls," often cause damage (ruined paths) in ways that are taken as part of their natural traits.

(c). *Foolishness*

Foolishness is another negative value symbolized by livestock in Jordanian proverbs, especially the donkey, mule, and sheep. For example, a mule remains a symbol of mockery, even if characterized by strength, toughness, and patience. It is said that *الْجِسْمُ جِسْمُ بَغْلَةٍ وَالْعَقْلُ عَقْلُ سَخْلَةٍ* /il-jisim jisim baghla wal-'aql aql sakhlah / "The body is that of a mule, but the brain is that of a lamb." The signifier is the "mule" and "lamb". The "mule" signifies "someone who has a big body". The "lamb" signifies "innocence, childhood, little brain". This proverb refers to those who are mature but whose behaviours do not reflect their adult body. Culture-wise, it targets unhinged individuals in society, although they have large size and mature age. Society is a staunch advocate of the value of wisdom and soberness. In sum, physical strength is not enough; one should also have mental acuity to act.

In Jordanian proverbs, foolishness is always associated with donkeys; it is a default symbol for donkeys because they are fools and easy to deceive. A Jordanian proverb says *ظَلَّكَ يَا حِمَارٌ تَا يَجِيكَ الْعَلِيْقُ* /dhalak yā ħmār tā yijik il-'ulīq/ "Stay as you are until the brambles come your way". Here, the signifier is the "donkey", and the signified is "the one who gets deceived and still builds hopes over people's lies". Culturally, this proverb refers to foolish people who always fall for others' empty promises. This proverb serves as criticism to individuals easily deceived by empty words. It targets deception and simultaneously rejects foolishness to reinforce the value of righteousness in Jordanian society. From another perspective, this proverb motivates people to work hard, stay vigilant, and overcome laziness.

(d). *Laziness*

Jordanian proverbs criticize society by portraying an excuse-maker and indolent person as a camel limping on its ear or lip, so they said: *الْجَمَلُ بَعْرَجٌ مِنْ اِذْنِهِ* /il-jamal bi'ruj min 'idhnuh / "A camel limping on its ear". This proverb metaphorically uses the image of a camel, often associated with strength and endurance, and compares it with the image of a limp, signifying weakness or disability. The "camel" and "limp" depict "strong people who keep looking for unconvincing excuses to procrastinate". Semantically speaking, this proverb criticizes deceit, laziness, and pretending, as there is no direct relationship between "ears" and "limping". The proverb likens someone pretending to avoid work to a camel limping on its ear. Jordanian society criticizes indolent people and exposes their weak excuses because they do not align with its values. This proverb also suggests that people should use their resources wisely and effectively to face challenges.

The following example also illustrates how cows are portrayed as a symbol of laziness: *الْبَقَرَةُ الْمَرْبُوطَةُ مَا بِتَغْلِبُشْ حَالَهَا* /'il-baqara il-marbūta ma bitghalbish ħālha/ "The tied cow does not tire itself." This proverb semantically denote that the cow is tied up and, thus, cannot move or put unnecessary effort. It is physically restrained, so it remains passive and avoids unnecessary activity, whereas, culturally, the proverb highlights the negative consequences of laziness. It implies that one should not blame the circumstances for the unfortunate situation they are in. It also urges people not to give up, but instead stay strong and fight for what is best for them.

(e). *Mockery*

The goat, bull, and donkey represent mockery in the data. For example, *الْعَنْزُ الْجَرْبَا تَشْرَبُ مِنْ رَاسِ النَّبْعِ* /il-'anz il-jarba tishrab min rās in-nab' / "The mangy goat drinks from the mouth of the spring". At the literal level, this proverb describes a diseased goat drinking directly from the best place in a spring. This image shows an inane creature accessing a valuable resource. The signifiers here are the "mangy goat" and the "mouth of the spring"; they symbolize "untrustworthiness" and "prestige and high status", respectively. The proverb implies social discontent and dissatisfaction with injustice and discrimination and condemns corruption and social inequality.

Donkeys are shown as a symbol of mockery and lousiness since they cannot differentiate good from bad. Therefore, Jordanians ironically say, *شو عرف الحمير بشم الورد* /shū 'arraḥ il-ḥamīr b-sham il-ward/ "What do donkeys know about roses smelling?" The signifier is the "donkey" and the "roses", and the signified is the "person who lacks good judgment and sophistication". Semantically, this saying applies to people incapable of discerning right and wrong in any aspect of life. Culturally, the proverb targets people who misjudge and underestimate beautiful things.

(f). *Stubbornness*

This negative value is closely associated with animals such as the mule and donkey. For example, the mule inherits the endurance of a donkey and the strength of a horse from both its parents, the donkey and the horse. A mule is an animal that is often used metaphorically to denote stubbornness, as in the phrase: *عند عند البغل* /'anīd 'ind il-baghul/.

"As stubborn as a mule". Some proverbs condemn the stubbornness of a mule, an animal whose malice can reach dangerous levels. One saying goes: *ما تستكثر الرفس من البغل النجس* /ma tistakthir ir-rafs min il-baghul in-najs/ "Do not be surprised if a filthy mule kicks too much." This proverb applies to those of evil nature, for no matter how seemingly good a "mule" appears, one must always foresee a "kick" coming from it. Semantically speaking, "mule" here refers to the "wickedly stubborn individuals" of the real world and its "kick" to the type of "harm" these people bring others. Culturally speaking, the proverb focuses on the people who hurt others due to their stubbornness and insistence on inflicting harm due to their corrupt nature. Consequently, this reinforces the importance of forbearance and leniency and dismisses stubbornness that harms others in a community.

Bulls are also used in proverbs to depict stubbornness. For example, they say *نقول ثور يقول احلبوه* /ingūl thūr yiqūl ihlibhūh / "We say it is a bull, yet they ask to milk it". This proverb describes stubborn people who refuse reason and insist on committing the same mistakes or those who stick to their opinions and defy reality. Semantically, the proverb illogically uses a bull, a male livestock that cannot produce milk, yet stubborn people insist on trying to milk it. Culturally, this proverb symbolizes stubbornness, stupidity, ignorance, and waste of time and effort.

(g). *Baseness*

Baseness refers to a lack of honour or morals (Cambridge Dictionary Online). It describes dishonest and shameful actions or behaviours. The Jordanian society abhors all that contradicts its noble traditions and teachings and strongly criticizes those who deviate from its moral values. Hence, their proverbs depict such acts of baseness as a mangy camel. One saying goes: *الناقة الجربا يطلبها أهلها* /il-nāgah al-jarbā yuṭlubha ahil-hā/ "Only its owners bear the burden of the mangy camel." The *naaqah* is a female camel. The "mangy camel" symbolizes "ill-behavior". Semantically, this proverb compares an ill-mannered woman to a mangy camel. In Jordanian culture, this proverb emphasizes the importance of adhering to customs and traditions and condemns any deviation from them. If a member of a society behaves dishonourably, their close family are responsible for handling the situation to protect the family's reputation. The proverb also urges the parents to prevent their children from committing immorality as they are responsible for their misbehaviour.

The donkey is also used as a symbol of vileness, low- status, and ill-manner in Jordanian proverbs, as in *الحمار حمار ولو بين الخيول سار* /li-ḥmār iḥmār walaw sār bēn ilī-khyūl/ "A donkey remains a donkey even if he walks among horses." This proverb literally conveys that no matter the environment, a donkey remains a donkey. It implies that a person's inherent nature does not change, regardless of the people they interact with or the higher status of those around them. In this expression, the "donkey" represents someone who is innately "base or of low- status," while the "horse" represents a "superior social class." Therefore, no matter how much a person tries to link themselves with people of prestige and high status, their inherent nature remains the same, emphasizing social hierarchy.

(h). *Submissiveness*

Submissiveness is another negative value portrayed by livestock in Jordanian proverbs. This value is highly rejected and despised in Jordanian culture, which criticizes people for unthinkingly following others by comparing them to a donkey that obeys its owner, as in *حمار تركبته ولا خسان تقوده* /iḥmār trikbuh wala ḥiṣān tgūdoḥ/ "A donkey you ride is better than a horse you lead". This proverb explains how a donkey can be easily led, but a horse can be difficult to control. In Jordanian culture, leaders who surround themselves with submissive individuals and sycophants are strongly criticized. This proverb implicitly urges those in power to hire people with strong character and decision-making abilities, like the horse.

Jordanian folkloric proverbs also criticize people who surrender their affairs to others despite their intellect. Thus, they describe them as a large camel led by a small child. The proverb says: *جمال كبير لكن يقوده عيل صغير* /jamal kabīr lākin ygūduḥ 'ayel ṣaghīr/ "The camel is mighty, but a small child leads it." This proverb constitutes a paradox. A "big camel" signaling "strength, power and status" is led by "a small, weak, immature child". This proverb emphasizes that ability is the key factor, not size. It also condemns those who fail to activate and use their intellect; instead, they allow others, even with less power and competence, to control them. It also argues that having physical or intellectual strength is worthless if not used properly.

(i). *Bad Taste*

Some animals in Jordanian society, such as the camel, donkey, and bull, have been characterized as having bad taste. They were used in popular proverbs to reflect and apply this trait to social behaviours. The camel, for instance, is used mockingly to represent ignorance and bad taste, as in *ما يشبع الجمل إلا الخرفيش* /mā bishbi' il-jamal illā al-khurfīsh/ "Nothing satisfies a camel like milk thistle." The signifiers here are the "camel" and "milk thistle," a thorny annual winter plant. The signified is a "gluttonous person who is never satisfied" except with "hardships". Semantically, the proverb reveals some individuals' vulgarity, ignorance, lack of good taste, and crude eating manners. Culturally, it critiques ignorant individuals while celebrating the values of dignity and self-respect, which are highly cherished in Jordanian culture.

Jordanian popular proverbs have portrayed the donkey a symbol of ignorance and bad taste, as it cannot distinguish between what is beneficial and what is not. They say mockingly: *شو فهم الحمير بأكل الزنجبيل* /shū fahham al-ḥamīr bi-akl al-zanjabīl/ "How can donkeys appreciate the taste of ginger?" The signifier here is the "donkey" and the "ginger", while the signified is an "ignorant person" who lacks appreciation for "good things". This proverb describes people who attempt to engage in something not suiting their nature or temperament and those who cannot enjoy the value of things. The proverb also suggests that not everyone fits for every task and that some jobs require specific knowledge and experience.

(j). *Resentment*

Resentment is a feeling of profound hate, anger, and bitterness against someone else due to unfair treatment or insult (Strawson, 1962). Popular Jordanian proverbs have criticized certain individuals for being resentful. Some of these proverbs use animals as symbols of resentment, a dominant characteristic in camels (Al-Maalouf, 1985). It is a metaphor for a vindictive individual who does not forgive or forget. They say: *فلان حقود مثل الجمل* /fulān ḥagūd mithl al-jamal/ "So and so is resentful like a camel." In this example, the signifier is the "camel", while the signified is a "resentful person". This proverb indicates that some people hold grudges against others like camels do. It also targets people who resent others and refuse to forgive, depicting resentment as a trait condemned by Jordanian society.

Mules are also a symbol of resentment in Jordanian proverbs, as in *لا تقطع من وراء بغل، ولا من قدام حاكم* /lā tuḡluṭ min warā baghul, walā min giddām ḥākīm/ "Do not approach from behind a mule, nor from in front of a ruler." Here, the signifier is the "mule", while the signified is a "resentful person who hates others". This proverb warns against the harm caused by people in power, likening it to the danger of passing behind a mule, which might kick unexpectedly. Culturally, the proverb criticizes individuals who resent and harm others; it also praises forgiveness and tolerance as values society appreciates.

V. CONCLUSION

This study has investigated the symbolism of livestock in Jordanian proverbs from a linguistic and cultural viewpoint. The study's findings have indicated that livestock proverbs significantly contribute to shaping Jordanian society, reflecting the nation's mindset and unique cultural characteristics. This particular conclusion agrees with Alster (1993) and Gordon (1968), who indicated that proverbs intentionally use animal symbolism to communicate perspectives on life and criticize human behaviour. The findings have also revealed that livestock, mainly camels, sheep, goats, cows, horses, donkeys, mules, and bulls, are used in the proverb to signify both positive and negative meanings and values in Jordanian society. This study has identified the following positive traits in livestock-related proverbs: distinguished status, skill, uniqueness, strength, and endurance and patience. It has also been identified that the following negative traits are embodied in these proverbs, including worthlessness, poor judgment, foolishness, laziness, mockery, stubbornness, baseness, submissiveness, bad taste, and resentment. The findings have shown that livestock-related proverbs express more pejorative connotations than positive ones. Livestock are more commonly used in a derogatory way. This finding agrees with the findings of Domínguez (2006), Rodríguez (2009), Yusupova and Kazmina (2015), and Yinggang and Xuena (2015). This study has also indicated that animal names are culture-specific, supporting Nakhavali's (2011), Yusupova and Kazmina's (2015), and Al-Harashsheh and Al-Rousan's (2020) findings. Finally, this study recommends that a comparative study of livestock proverbs between Arabic and English be conducted in the future. This study unravels the linguistic and cultural similarities and differences in the use of such proverbs, the attitudes of people towards livestock, and people's behaviour. It also shows how these two cultures use animals to express meanings, such as wisdom, worthlessness, pride, or stubbornness.

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Effects of Digital Storytelling on Vietnamese EFL Students' Writing Performance in Narrative Paragraphs

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Abstract—This study aims to shed light on the effects of digital storytelling (DST) on English as a Foreign Language (EFL) students' writing performance in narrative paragraphs at a university in the Mekong Delta of Vietnam. The study participants were 53 non-English major students, of whom 28 were in the control group and 25 were in the experimental group (EG). While digital storytelling was used to teach students in the experimental group, mind-mapping (MM) was employed for the learners of the control group (CG) throughout an 8-week intervention. Data was collected via pre-test and post-test to determine the effects of the interventions. The findings indicated that students' writing performance of the two groups was improved; however, the holistic scores of the experimental group condition were significantly higher than those of the control group. It is worth noting that the control group also showed improvement in their writing, particularly in content, vocabulary, and mechanics. A questionnaire was utilized to determine students' attitudes toward using a digital storytelling tool in learning to write. The overall score of the questionnaire indicates that students' perceptions in the experimental group are more positive than those of the control group. Finally, some implications and recommendations are also included.

Index Terms—digital storytelling, Vietnamese EFL students, writing performance, students' attitudes, mind-mapping

I. INTRODUCTION

Writing is a crucial part of language learning, requiring students to work hard and practice to reach a certain level of proficiency (Abdel-Haq & Ali, 2017). According to Maghsoudi and Haririan (2013), writing can help students focus, organize their ideas, and improve their synthesis, analysis, and critical capacity. It can also excite their cognitive processes, providing an intellectually stimulating experience. Kellogg (1999) states that writing is a crucial skill since it allows students to portray their personalities, create interpersonal relationships, enhance their cognitive skills, and offer valid and appealing arguments. Considering the importance of writing, using efficient instructional techniques is essential to support students in developing this skill (Blasco, 2016). As a result, teachers must be able to use a range of strategies in class to assist students with the writing process (Cahyati & Madya, 2019).

DST is one technique that EFL instructors use to enhance their students' writing performance. Yamac and Ulusoy (2016) state that DST is a powerful educational technique to assist learners in enhancing the quality of their writing by helping them better organize their ideas, use words, and use fluent sentences. Duman and Göcen (2015) emphasize that DST encourages students to improve their creative writing skills as well as their ability to use language and grammar effectively. Considering the above factors, the application of DST was reported to enhance students' writing performance and boost students' drive, self-assurance, and narrative writing (Abdel-Hack & Helwa, 2004).

Vietnamese EFL students at a university in the Mekong Delta had time to study writing skills in high schools. However, Nguyen and Rijlaarsdam (2023) confirmed that students still experience specific challenges for a wide range of causes. First, students find writing boring and have little interest in it since they believe writing is a difficult skill for expressing their ideas. Second, students frequently struggle with how to start, develop, and determine the order of the occurrences in a story. Then, students generally lack vocabulary for different kinds of texts, including narrative, descriptive, report, process, and recount texts. Finally, they struggle to use grammar correctly in their writing.

II. LITERATURE REVIEW

A. Definitions of Writing

Writing is the most important skill for students in learning a language (Dhanya & Alamelu, 2019). According to Richards and Schmidt (2013), writing requires several key steps: planning, drafting, reviewing, and editing. Several strategies for teaching writing in first and second languages encourage students to take these steps. Raimes (1983) indicated that writing has several benefits, encompassing the reinforcement of vocabulary, idioms, and grammatical structure taught to students. Additionally, while writing, writers have the opportunity to be creative with language. Hence, writing is a unique method for ensuring that students remember what they have learned since it pushes them to utilize the language they are learning and to try to express their points of view.

B. Writing Performance

According to Hamp-Lyons (2003), a direct writing assessment is a performance-based exam that incorporates the writer, assignment, raters, and rating method, with scoring rubrics serving as a crucial sub-component in the assessment of writing. Metruk (2018) stated that the evaluation of writing quality can be divided into three broad categories: holistic (assigning a single subjective score), analytical (using multiple forms of subjectivity to obtain a score), and objective (examining a score and analyzing the prevalence of linguistic elements). According to Haswell (2014), several different scales are used to evaluate writing. Inheriting the standard writing scale used for writing assessment was initially designed by Jacobs (1981). It was applied to evaluate students' writing and identify any differences in pre-test and post-test scores between the two groups. Therefore, the researchers decided to adapt the rubrics of Jacobs (1981). The writing scale specifies the five component sections: content, organization, vocabulary, grammar and mechanics. Each scale component is divided into four bands: excellent, good, average, and poor.

C. Narrative Writing

According to Abdalla and Adam (2015), writing about events, unique experiences, whether real or fictional, is referred to as narrative writing. Similarly, Westby and Culatta (2016) define writing a narrative as the act of telling a story or providing information about a specific event. Bruner (2004) stated that narrative writing is extremely essential in our lives since it helps learners develop their creativity and transcend cultural divides. Tompkins (2008) added, the five essential elements of narrative writing are plot, setting, characters, theme, and point of view.

D. Reasons for Choosing DST and MM as Treatments for the EG and CG

DST and MM are considered effective techniques for improving writing ability (Castillo-Cuesta et al., 2021). To investigate the impact of these two techniques on writing ability, this study employed DST as an intervention for the EG and MM as a treatment for the CG. Apart from the above-noted similarities, both groups nonetheless exhibit some distinct differences.

By definition, DST and MM are unique visual aids that captivate learners and help them write more vividly (Abd Karim & Mustapha, 2022). However, while DST involves audio, MM does not (Burgess-Allen & Owen-Smith, 2010). In terms of skills, both DST and MM help learners develop communication skills and foster collaboration by working in groups (Betancur & King, 2014), while MM requires a more time-consuming handwriting process (Villalon & Calvo, 2011).

In terms of organization, DST and MM encourage students to organize and express their ideas and knowledge in an individual and meaningful way. With the help of DST and MM, students comprehend the organization of stories through the processes of reflection, editing, and feedback (Saori, 2020). However, compared to DST, MM is more complex and challenging for students to comprehend (Palioura & Dimoulas, 2022).

In terms of content, DST and MM provide learners with high-quality learning content (Rezapour-Nasrabad, 2019) and stimulate students' life experiences (Kim & Li, 2021). For fluency, DST and MM strengthen the writing process, increase the number of words and exact sentences (Yamac & Ulusoy, 2016). However, MM is a relatively traditional technique, while DST utilizes information technology and receives increasing attention (Bumgarner, 2012). Generally, both DST and MM are considered viable techniques for improving writing performance.

E. Process of Creating a DST

There are four primary phases to the DST procedure. The first phase is pre-production, which includes the process of developing a story idea, creating a storyboard and preparing for script narration and production materials. The second phase is production, which entails converting story ideas into digital media elements as outlined in the storyboard. The third phase is post-production, which encompasses finalizing the DST procedure and editing multimedia assets (audio, video, and photos). The last phase is distribution, which involves sharing stories with the public via the web or digital media (Hussain & Shiratuddin, 2016). After that, students import all their collected images and sounds into a multimedia product, such as Photostory 3, Movie Maker, ProShow Producer, or Apple iMovie. In this step, learners can adjust the sequence of the photographs. Students can share their finished digital stories with friends and teachers for feedback when they are complete, and save them as video clips.

F. Using Photo Story 3 as a DST Platform

Tsou et al. (2006) recommend that it is preferable to use websites over software programs, as both students and teachers can readily access generated tales without worrying about software installation and upgrades. Learners can use multimedia software such as Photostory3, Movie Maker, ProShow Producer, Animoto, and Apple iMovie to create their tales. According to Thesen and Kira-Soteriou (2011), Photostory3 is a software package designed to generate digital stories that are easy to use, providing users with offline access. Sheneman (2010) asserts that students may make videos by using stationary photos. Rossiter and Garcia (2010) also point out that it is significantly easier to combine the components required by the storyteller, such as images, music, and script, to make the tale successful. Thesen and Kira-Soteriou (2011) advise students to arrange images, music, and story before beginning to use Photostory3 and outline the fundamental processes to create their digital stories as follows:

- Step 1: Writing a new narrative or revise an existing one
- Step 2: Importing and arranging images
- Step 3: Giving the imported images a title
- Step 4: Narrating images and customizing motion
- Step 5: Incorporate background music
- Step 6: Saving the narrative

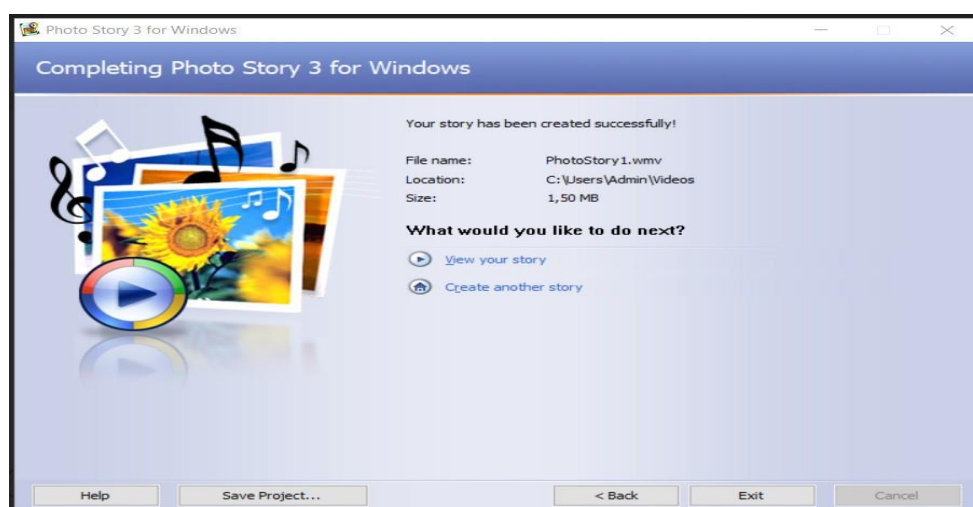


Figure 1. Photo Story 3

Teachers and students may now construct their own stories using various multimedia tools. Photostory3 is a simple software program that was selected and utilized for this research study.

G. Students' Attitudes Toward Using a DST Tool in Learning to Write

Attitudes may be defined as a mentality or a proclivity to behave in a specific way, resulting from temperament and personal experience (Schuman & Johnson, 1976). Verplanken et al. (1998) assert that attitudes are comprised of three components, namely cognitive, affective, and behavioral. Cognitive attitude encompasses ideas and thoughts about an entity, person, behavior, event, or knowledge (Jain, 2014). This component has a significant impact on learning, as it is related to the mind, specifically perception. Affective attitude contains a person's sentiments and emotions about an item (Dijker, 1987). Behavioral attitude refers to an individual's behaviors or capacity to do a specific activity in a given scenario (Bentler & Speckart, 1979). This influences a person's preferences, such as whether they are for or against, like or detest something.

H. Related Studies

First, Castillo-Cuesta et al. (2021) examined the effects of DST on the writing skills of pre-service EFL teachers. This study used a mixed-method approach and included 101 students enrolled in four distance courses for the English Major at a private university in Ecuador. The key findings suggest that students' writing abilities improved significantly, especially in grammar and vocabulary. Furthermore, DST was seen as an efficient technique for encouraging students to participate in activities to exhibit their knowledge when constructing narrative projects.

Second, Duman and Göcen (2015) carried out a study to investigate the effect of the DST on students' creative writing skills. In this study, the EG was assigned using DST, while the CG was assigned through PowerPoint presentation-based instruction. A pretest-posttest CG design was employed. As a result of the analyses conducted on the post-test scores of the EG and CG, a meaningful disparity in favor of the EG was recognized, indicating that the DST technique is a comprehensive tool for improving students' creative writing skills. The technique not only contributed to students developing original ideas, thinking fluently and flexibly, using words accurately, and mastering sentence structures, but also provided organization and helped them use styles and grammar correctly. However, this study primarily examines

the improvement in the mean scores of pre-test and post-test for the EG and CG across three components: content, language, and vocabulary. Students' attitudes before and after the intervention have not been examined yet.

Then, Rong and Noor (2019) attempted to implement a DST tool in teaching Writing for English Form 1 and identified the elements of the DST tool that might promote students' writing skills. The findings indicate an improvement in students' performance after four treatments using the DST tool. After using the DST tool, the respondents consistently applied six elements: 'Overall Purpose of the Story', 'Dramatic Questions', 'Choice of Content', 'Pacing of the Narrative', 'Quality of the Images', and 'Good Grammar and Language Usage'. Furthermore, there is an improvement in the post-test marks of respondents after four treatments of using Storybird. The study indicates a relationship between components of DST tools employed across the four treatments and students' writing performance in the post-test. All components demonstrate a meaningful relationship with students' writing outcomes, with the exception of the element 'Dramatic Questions'.

Choo and Li (2017) explored the use of digital writing to improve students' essay writing skills and their motivation to write and share ideas. Through utilizing qualitative data that encompassed analysis of students' written work, reflective journals, and interviews, the study demonstrates a marked preference for digital writing over traditional print-based approaches. The findings uncover that digital writing enhances the essay writing skills among student teachers. Additionally, students' presentation and essay writing quality are remarkably improved. Hence, the student's work showed improvement in the aspects of language use, organization, and specifically in writing content. The approach of digital writing encouraged students to engage in a more collaborative writing process with others, thereby contributing to a collaborative learning environment and enhancing their motivation to write. It is suggested that this approach is considered an effective alternative to teaching English writing to students.

Goestina et al. (2022) attempted to describe the ambiance of improving students' story-writing abilities with the usage of DST. The authors collaborated to develop the lesson plans, execute the tasks, record their observations, and analyze the results. The data was collected through classroom observations, interviews, questionnaires, and assessments. DST helped students improve their story-writing skills in four areas: topic, organization, vocabulary, grammar, and mechanics. The survey findings also indicate that students are willing to provide favorable feedback on the use of DST in writing instruction.

Tajeri et al. (2017) investigated the benefits of using DST in language classes at higher education institutions. A quasi-experimental design of the pre-test and post-test was employed with a sample of 20 postgraduate students and research scholars enrolled in two English classes. Qualitative data were collected to evaluate the effectiveness of DST in learning, encompassing responses to the questionnaire and student interviews' recordings. The data collected were analyzed using descriptive analysis and qualitative content analysis. The findings illustrate that students were satisfied with DST and perceived significant learning gains, particularly in their writing skills, and improved their vocabulary at a high level.

Finally, Zarei and Navidinia (2024) aimed to uncover the influence of DST on boosting EFL students' writing skills and investigate their perceptions of this learning strategy. Data were gathered from students' writings and a questionnaire. The results showed a substantial difference between the students' pre-test and post-test writing scores, confirming the effectiveness of DST in teaching EFL writing. The study's findings demonstrated that this pedagogical method helps learners enhance their writing skills and sub-skills, including content, organization, vocabulary, language use, and mechanics, particularly in learning grammatical rules. The usage of DST may assist students in learning new words and their relevant context. Furthermore, the participants stated that DST may improve their linguistic abilities, motivation, collaboration, creativity, self-esteem, and social skills.

III. METHODOLOGY

A. Research Questions and Design

This research employs quantitative method. Two tests and questionnaires were used to answer the two research questions. The intervention time for the study is 8 weeks, from March to April, 2025. The study was conducted at a university in the Mekong Delta, Vietnam, which is fully equipped with learning facilities. This study was guided by the following research questions:

1. To what extent does DST enhance the writing performance of Vietnamese EFL students in narrative paragraphs?
2. What are Vietnamese EFL students' attitudes towards learning to write with DST?

TABLE 1
RESEARCH DESIGN

Panel			
Group	Pre-test	Intervention	Post-test
EG		Digital storytelling treatment	
CG	Pre-test Pre-questionnaire	Mind map treatment	Post-test Post-questionnaire

B. Participants

Fraenkel et al. (2012) proposed that convenience sampling is choosing a group of participants based on their willingness to participate in the study. Likewise, Obilor (2023) claimed that convenience sampling involves selecting readily available

individuals. As convenience sampling is less expensive and more convenient than other sample approaches, it is frequently chosen by researchers. Recognizing the benefits of using convenience sampling, the researchers selected 53 university students from various majors attending the General English course. They originate from provinces in the Mekong Delta of Vietnam. They are between 19 and 25 years old and in their second year of a four-year bachelor's degree program at the university. Some participants passed the national university entrance exam and are now pursuing their studies uninterrupted, from high school to university. In contrast, other learners finished their high school programs 2-3 years ago, then took temporary jobs or served in the military and returned to the university to pursue their undergraduate studies.

C. Instruments

Writing tests

This study engaged the students in a pre-test and a post-test. Each test lasted 60 minutes. The pre-test was used to assess the students' writing performance before the intervention, demonstrating their commitment to the research. After the intervention, students were given a post-test to assess the improvement in their writing performance. These two narrative writing tests, designed to align with the course content, served a specific purpose in the study. Both tests were carefully selected from the book, "Preliminary English Test" (PET) by Cambridge University Press, to ensure their relevance and reliability in assessing writing performance.

Questionnaire

A questionnaire was created to assess students' attitudes toward learning to write in English. There are 19 questions on the survey, and the 5-point Likert scale, which ranges from 1 to 5, was interpreted from strongly disagree to strongly agree. According to Ostrom (1969), the questionnaire can produce three different components of data about the respondents: affective attitudes, cognitive attitudes, and behavioral attitudes.

[1] affective attitudes: items 1, 2, 3, 4, 5

[2] cognitive attitudes: items 6, 7, 8, 9, 10, 11, 12, 13, 14, 15

[3] behavioral attitudes: items 16, 17, 18, 19

TABLE 2
STUDENTS' ATTITUDES TOWARD LEARNING TO WRITE

No.	Statements	1	2	3	4	5
1	I think I like writing tasks.					
2	I think I am confident in writing.					
3	I think I am active in editing my tests.					
4	I think I am motivated in writing.					
5	I think I am encouraged to write more by myself.					
6	I think it is very challenging for me to develop content for my writing.					
7	I think writing helps me enrich my vocabulary.					
8	I think my grammatical points have been improved through writing.					
9	I think writing helps me organize ideas effectively.					
10	I think I know how to write a topic sentence.					
11	I think I know how to write supporting sentences.					
12	I think I know how to write a concluding sentence.					
13	I think writing helps me use correct spelling.					
14	I think I understand the characteristics of a good writing text.					
15	I think I can explain my ideas clearly.					
16	I think writing helps me develop my critical thinking.					
17	I think I can manage time when writing.					
18	I think I have achieved good results in my writing performance.					
19	I think I have tried my best to finish the writing task.					

D. Data Collection Procedure

The tests in the EG and CG are at the same level of PET 1, with the same format and length. The data collected were submitted to SPSS for analysis.

TABLE 3
RESEARCH PROCEDURE FOR THE INTERVENTION

Time	EG	Research activities	CG
Meeting 1	The instructor informed the course's aim and explained that data from the course would be used for research and treated confidentially.		
Meeting 2	The pre-test of 60 minutes and pre-questionnaire were delivered to both groups		
Meeting 3	Topic 1: The best memory "Write a narrative paragraph (80-100 words) about the first time you met your best friend"		
	Using DST platform		Using MM
Meeting 4	Topic 2: The special day "Write a narrative paragraph (80-100 words) about your first day at a new school".		
	Using DST platform		Using MM
Meeting 5	Topic 3: The holiday "Write a narrative paragraph (80-100 words) about your favorite holiday"		
	Using DST platform		Using MM
Meeting 6	Topic 4: The adventure "Write a narrative paragraph (80-100 words) about your most exciting adventure"		
	Using DST platform		Using MM
Meetings 7, 8	A post-test of 60 minutes and a post-questionnaire were delivered to both groups.		

Table 3 demonstrates that 53 students completed a pre-test at the beginning of the course in both groups. DST treatment is applied to the EG's students from the third to the sixth weeks of the study. During the last weeks of the study, students in both groups completed the post-tests. Additionally, the questionnaire was delivered to 25 participants in the EG at the end of the intervention to examine the students' attitudes toward learning to write using the DST treatment.

IV. RESULTS AND DISCUSSION

A. Effects of DST on EFL Students in Writing Narrative Paragraphs

Quality of Writing Before the Intervention

Inter-rater Reliability at the Pre-test of the EG

At the pre-test, data collected from the EG were assessed by two raters. The inter-rater reliability of the pre-test in the EG was .949, indicating a high level of reliability in the assessment of the two raters. The outcome revealed a statistically significant correlation ($r = .949$; $p \leq .001$) between the scores of the two raters. They are shown in Table 4.

TABLE 4
INTER-RATER RELIABILITY AT THE PRE-TEST OF THE EG

INTER-RATER RELIABILITY AT THE PRE-TEST OF THE EG		
Reliability Statistics		
Cronbach's Alpha	2 Sets of Scores at Pre-test of EG	
.949	2	
	Correlation	
	Examiner 1	Examiner 2
Examiner 1 Pearson correlation	1	.914**
Sig.(2-tailed)		.000
N	25	25
Examiner 2 Pearson correlation	.914**	1
Sig.(2-tailed)	.000	
N	25	25

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

Inter-rater reliability at the pre-test of the CG

Table 5 indicates that the inter-rater reliability at the pre-test for the CG was .947, which represented a high level of reliability in the assessment of two raters. The result revealed a statistically significant correlation between the scores of two raters ($r = .947$; $p \leq .001$).

TABLE 5
INTER-RATER RELIABILITY AT THE PRE-TEST OF THE CG

INTER-RATER RELIABILITY AT THE PRE-TEST OF THE CG		
Reliability Statistics		
Cronbach's Alpha	2 Sets of Scores at Pre-test of CG	
.947	2	
Correlation		
	Examiner 1	Examiner 2
Examiner 1 Pearson correlation	1	.900**
Sig.(2-tailed)		.000
N	28	28
Examiner 2 Pearson correlation	.900**	1
Sig.(2-tailed)	.000	
N	28	28

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

Students' writing performance at the pre-test

TABLE 6
DESCRIPTIVE STATISTICS AND INDEPENDENT SAMPLE T-TEST OF THE EG AND CG AT THE PRE-TEST

Group	Test	Min	Max	Mean	SE	SD	Sig.(2-tailed)	t	df
EG (n=25)	Pre-test	9.00	14.00	11.44	.30	1.53	.974	.033	51
CG (n=28)		9.00	14.00	11.43	.18	.99			

Findings from the pre-test demonstrate that there is no difference between the two groups after the intervention. Specifically, students' performance in the EG was at a mean score of 11.44 (Min = 9.00, Max = 14.00), and the CG was at a mean score of 11.43 (Min = 9.00, Max = 14.00). Independent Sample T-test showed no statistical difference between the EG and the CG at the pre-test ($t(53) = .033, p = .974$). It is concluded that the writing performance levels of the two groups of students were similar.

Quality of Writing After the Intervention

Inter-rater Reliability at the Post-test of the EG

Table 7 shows a high level of reliability achieved by two raters in the post-test. The Inter-rater reliability of the EG is .946. The finding showed a statistically significant correlation between the two raters' scores ($r = .898; p \leq .001$).

TABLE 7
INTER-RATER RELIABILITY AT THE POST-TEST OF THE EG

ENTER YOUR RELIABILITY AND TEST OF THE EG		
Reliability Statistics		
Cronbach's Alpha	2 Sets of Scores at Post-test of EG	
.946	2	
Correlation		
	Examiner 1	Examiner 2
Examiner 1 Pearson correlation	1	.898**
Sig.(2-tailed)		.000
N	25	25
Examiner 2 Pearson correlation	.898**	1
Sig.(2-tailed)	.000	
N	25	25

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

Inter-rater Reliability at the Post-test of the CG

Table 8 presents the inter-rater reliability of the post-test in the CG, indicating a high level of reliability in the assessment of two raters. The finding showed a statistically meaningful correlation between the two raters' scores ($r = 0.886; p \leq .001$).

TABLE 8
INTER-RATER RELIABILITY AT THE POST-TEST OF THE CG

ENTER RATER RELIABILITY AT THE POST-TEST OF THE CG		
Reliability Statistics		
Cronbach's Alpha	2 Sets of Scores at Post-test of CG	
.939	2	
Correlation		
	Examiner 1	Examiner 2
Examiner 1 Pearson correlation	1	.886**
Sig.(2-tailed)		.000
N	28	28
Examiner 2 Pearson correlation	.886**	1
Sig.(2-tailed)	.000	
N	28	28

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

Students' writing performance at the post-test

TABLE 9
DESCRIPTIVE STATISTICS AND INDEPENDENT SAMPLE T-TEST OF THE EG AND CG AT THE POST-TEST

Group	Test	Min	Max	Mean	SE	SD	Sig.(2tailed)	t	df
EG (n=25)	Post-test	12.00	18.00	15.96	.29	1.48	.000	5.998	51
CG (n=28)		11.00	16.00	13.60	.25	1.37			

Findings from the post-test show that there is a difference between the two groups after the intervention. The student's performance in the EG was at a mean score of 15.96 (Min = 12.00, Max = 18.00), and the CG was at a mean score of 13.60 (Min = 11.00, Max = 16.00) at the post-test of writing performance. Results from the Independent Sample T-test showed a statistically significant difference between the EG and CG at the post-test ($t(53) = 5.998, p \leq .001$). Overall, there was a significant change in the post-test after the 4-week intervention. Specifically, the mean score of students' writing performance in the EG was significantly higher than that of the CG.

Students' Improvement on Five Components of Writing in the EG

To investigate whether there was a disparity in the mean scores of five writing components between the pre-test and post-test, the analysis was conducted using a Paired Samples T-test. The specific information is presented in Table 10.

TABLE 10
STUDENT'S IMPROVEMENT ON FIVE COMPONENTS IN WRITING AT PRE-TEST AND POST-TEST IN THE EG

Condition	Components of writing	N	Mean	SD	SE	t	df	Sig.(2-tailed)
Pre-test (EG)	Content	25	1.92	.95	.19	-6.592	24	.000
Post-test (EG)			3.40	.64	.12			
Pre-test (EG)	Organization	25	2.44	.96	.19	-3.174	24	.004
Post-test (EG)			3.24	.66	.13			
Pre-test (EG)	Vocabulary	25	2.16	1.02	.20	-5.023	24	.000
Post-test (EG)			3.48	.77	.15			
Pre-test (EG)	Grammar	25	2.40	.81	.16	-5.432	24	.000
Post-test (EG)			3.56	.65	.13			
Pre-test (EG)	Mechanics	25	2.52	.82	.16	.972	24	.431
Post-test (EG)			2.28	.61	.12			

Table 10 presents the mean scores reflecting students' writing performance on each component in a paragraph. A Paired Samples T-test was conducted to compare the results of the pre-test and post-test. In this assessment, the mean scores for the pre-test and post-test are analyzed across five aspects of the total score. These aspects encompass grammar, vocabulary, mechanics, content, and organization, with each element worth four marks. The results showed prominent differences when comparing the pre-test to post-test scores in the following areas: content ($t(25) = -6.592, p = .000$), and organization ($t(25) = -3.174, p = .004$), vocabulary ($t(25) = -5.023, p = .000$), and grammar ($t(25) = -5.432, p = .000$), and mechanics ($t(25) = .972, p = .431$). The results showed that the students in the EG demonstrated significant improvement in four components—content, organization, vocabulary, and grammar — after the treatment.

Students' Improvement on Five Components of Writing in the CG

To investigate whether there was a discrepancy in the mean scores of five components in a writing paragraph between the pre-test and post-test, the analysis was conducted using a Paired Samples T-test. The specific information is presented in Table 11.

TABLE 11
STUDENT'S IMPROVEMENT ON FIVE COMPONENTS IN WRITING AT PRE-TEST AND POST-TEST IN THE CG

Condition	Component of writing	N	Mean	SD	SE	t	df	Sig.(2-tailed)
Pre-test (CG)	Content	28	2.00	.54	.10	-6.112	27	.000
Post-test(CG)			3.17	.72	.13			
Pre-test (CG)	Organization	28	2.35	.55	.10	-.515	27	.611
Post-test(CG)			2.46	.79	.14			
Pre-test (CG)	Vocabulary	28	2.10	.62	.11	-3.022	27	.005
Post-test(CG)			2.78	.83	.15			
Pre-test (CG)	Grammar	28	2.57	.50	.09	.493	27	.626
Post-test(CG)			2.50	.69	.13			
Pre-test (CG)	Mechanics	28	2.39	.56	.10	-1.686	27	.103
Post-test(CG)			2.67	.66	.12			

Table 11 presents the mean scores reflecting students' writing performance on each component in a paragraph. The pre-test and post-test results were compared using a paired samples t-test, a method that allows for a direct comparison of the two sets of results. In this assessment, the mean scores for the pre-test and post-test are analyzed across five aspects contributing twenty marks. These aspects encompass grammar, vocabulary, mechanics, content, and organization, with each element being worth two marks. The results showed significant differences when comparing the pre-test scores to the post-test scores in the following areas: content ($t(28) = -6.112, p = .000$), and organization ($t(28) = -.515, p = .611$), vocabulary ($t(28) = -3.022, p = .005$), and grammar ($t(28) = .493, p = .626$), and mechanics ($t(28) = -1.686, p = .103$). The results showed that the students in the EG had remarkably improved in three components of writing: content, vocabulary, and mechanics.

In conclusion, a significant improvement was observed in the writing performance of the EG after the four-week intervention using DST. This improvement was notably higher than that of the CG, indicating the effectiveness of DST in enhancing writing skills.

Figure 2 provides a clear comparison of the mean scores between pre-test and post-test of the EG and CG, highlighting the noticeable difference in the EG's performance.

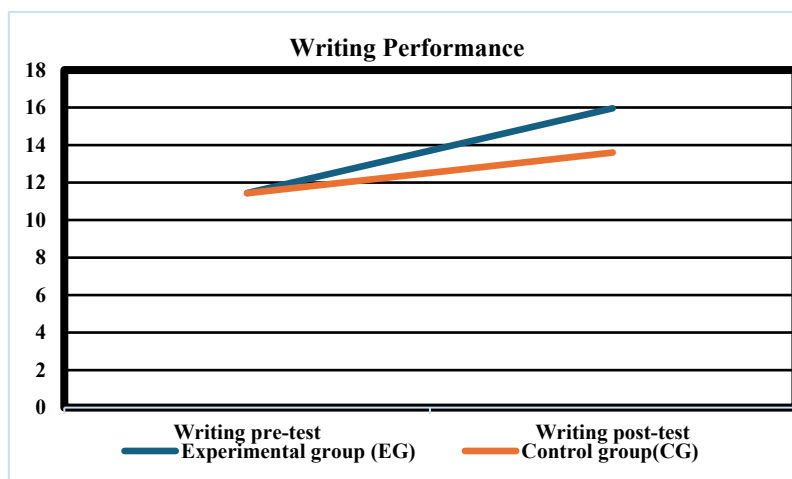


Figure 2. Students' Writing Performance With the Mean Scores of the Pre-Test and Post-Test of the EG and CG

B. Attitudes of Vietnamese EFL Students Toward Learning to Write

Results of the Questionnaire

Before and after doing the pre-test and post-test, students in two groups received the 5-point questionnaire with 19 items. The survey covered 25 students who used DST intervention and 28 students who attended MM treatment. The 5-point Likert scale, ranging from "strongly disagree" to "strongly agree," was analyzed to evaluate participants' responses.

Independent Samples T-test on the Questionnaire of Two Groups at Pre-test and Post-test

In response to the second research question, the Descriptive Statistics Test was utilized to calculate the overall mean scores of the students' attitudes toward learning to write in two groups. The mean scores of the questionnaire for the two groups at pre-test and post-test were measured to determine whether the students had positive attitudes toward learning to write.

TABLE 12
INDEPENDENT SAMPLE T-TEST ON THE QUESTIONNAIRE OF TWO GROUPS AT PRE-TEST AND POST-TEST

Stage	Group	Mean	df	Sig.(2-tailed)
Pre-questionnaire	Experimental group (n=23)	1.45	49	.119
	Control group (n=28)	1.37		
Post-questionnaire	Experimental group (n=25)	7.73	49	.000
	Control group (n=28)	4.05		

As shown in Table 12, the overall mean scores of the pre-test questionnaire were 1.45 and 1.37 in the EG and CG, respectively. The mean score of the post-test questionnaire of the EG was 7.73, and that of the CG was 4.05. This was followed by the Independent Sample T-test to evaluate whether the two groups had a similar level of attitudes toward learning to write before the treatment. The results indicated that there was no statistically significant difference in the mean scores of the students' attitudes toward learning to write in both groups before the treatment. Specifically, students in the EG ($M=1.45$) scored nearly the same as those in the CG ($M=1.37$). The value of Sig (2-tailed) at the pre-test was .119, which was greater than $p=.05$. Thus, it was indicated that the students in the EG and CG had the same attitudes toward learning to write before the four-week intervention.

After the intervention, the Independent Sample T-test was also used to investigate whether there was a statistically meaningful difference in the mean scores of the two groups in attitudes toward students' learning to write. The results showed that the mean score on the post-test of the questionnaire for the students in the EG was 7.73, significantly higher than the control group's 4.05. This difference, indicated by a Sig. (2-tailed) value of .000, lower than the *standard* $p=.05$, underscores the positive impact of the intervention. It is evident that the EG's attitudes toward their learning to write were dramatically higher than those of the CG.

Paired Samples T-test on the Questionnaire of Two Groups at Pre-test and Post-test

As can be seen in Table 13, the Paired Samples T-test was utilized to examine the development trend of each group.

TABLE 13
PAIRED SAMPLES T-TEST ON THE QUESTIONNAIRE OF TWO GROUPS AT PRE-TEST AND POST-TEST

Groups	Stage	Mean	df	Sig.(2-tailed)
EG (n=25)	Pre-test	1.45	22	0.000
	Post-test	7.73		
CG (n=28)	Pre-test	1.37	27	0.000
	Post-test	4.05		

In the EG, the mean scores of the participants in attitudes toward their cognitive writing performance increased from 1.45 to 7.73, and the significance value (Sig.) (2-tailed) was .000. Similarly, the mean scores of the participants in the CG

also increased from 1.37 to 4.05, and the Value of Sig. (2-tailed) was .000. It was concluded that the students' attitudes in both the EG and CG had improved after using DST and MM in learning to write. However, the students in the EG had a significantly higher score in attitudes toward their learning to write than those of the CG.

In conclusion, the results collected from the questionnaire revealed that the use of DST and MM positively affected students' attitudes toward learning to write. However, the overall scores of the questionnaire indicates that the attitudes of students in EG are significantly more positive than those of the CG. Figure 3 also clarifies the results discussed.

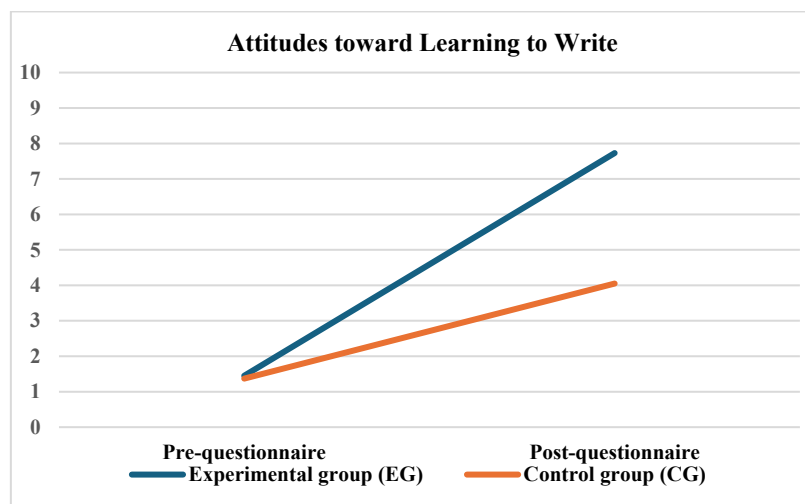


Figure 3. The Mean Scores of the Two Groups at the Pre-Test and Post-Test of the Questionnaire

C. Discussion

Effects of DST on EFL Students in Writing Narrative Paragraphs

Regarding the effects of DST on narrative writing, the results of the written texts in this study are consistent with the findings of previous research, which show that DS enhances narrative writing performance (Duman & Göcen, 2015; Rong & Noor, 2019). To discuss further, it was also found that the four components of writing—content, organization, grammar, and vocabulary — have improved after treatment with DST.

In terms of content, the findings of this study are consistent with those of Duman and Göcen (2015), who claimed that DST helps encourage students to generate creative ideas and contributes to their development of original ideas in writing, thinking fluently and flexibly, and using words accurately. The findings of the positive effects of DS on ideation also align with the results of Choo and Li (2017), who indicated that the participants' writing quality improved, particularly in the content of their writing. In terms of organization, the findings of this study align with those of Duman and Göcen (2015) who believed that DST is efficacious in improving organizational performance and that DST enhances students' organization by helping them comprehend the structure of stories through the processes of reflection, drafting, and feedback. In terms of grammar, the findings of this study also coincide with the research results of Rong and Noor (2019), who reported that DST can have a positive effect on students' writing, particularly in the area of "Good Grammar and Language Use". Similarly, Castillo-Cuesta et al. (2021) indicate that DST had a positive impact on the writing skills of EFL higher education students, as the participants in the EG showed a significant improvement in grammar. In terms of vocabulary, this research result corresponds with the research of Tajeri et al. (2017), who confirmed that using DST helps learners improve their vocabulary knowledge.

In contrast, this study showed no significant improvement in the mechanics of the EG after using DST in learning to write. As a result, this study differs from that of Zarei and Navidinia (2024), who state that DST improves students' writing mechanics. In the same vein, Goestina et al. (2022) report an improvement in students' writing mechanics after using DST as a treatment.

Students' Attitudes Toward Using a DST Tool in Learning to Write

Regarding the attitudes of DST on narrative writing, the results of the questionnaire in this study revealed that the attitudes of students in the EG are significantly more positive than those of the CG. This finding aligns with that of Goestina et al. (2022), who reported that students exhibit positive attitudes toward using DST in learning to write following the treatment. Similarly, this result aligns with the findings of Zarei and Navidinia (2024), who reported a substantial difference between the students' pre-test and post-test writing scores, confirming the efficacy of DST in teaching EFL writing.

V. CONCLUSIONS

A. Findings

This study yielded important findings regarding the effects of DST on narrative writing among Vietnamese EFL students. The main findings indicate that the students' writing performance in both groups improved; however, the holistic score of the EG was significantly higher than that of the CG. Regarding aspects of writing, while the EG improved in content, organization, grammar, and vocabulary, students in the CG showed improvement in content, vocabulary, and mechanics. This comprehensive improvement underscores the effectiveness of the DST in enhancing paragraph writing.

The analysis of the questionnaires shows that students in the EG and CG had similar attitudes toward learning to write before the intervention. After the treatment, the students' attitudes in the EG were significantly more positive than those of the CG. Therefore, DST is claimed to be an efficient tool for improving students' writing in narrative paragraphs.

B. Implications

First, the teachers can create a detailed schedule to ensure that the students have completed their work using a DST platform. The most important thing is for teachers to provide clear directions on what each student has to do while writing at home using a DST platform. Second, teachers should exercise caution when utilizing this technological tool, as improper usage or integration of this methodology may cause issues in the classroom, particularly for students who have limited access to technology and, therefore, limited experience using it in their daily lives. Third, teachers should receive training on using DST before applying it in the classroom to avoid making it too overwhelming. Students who receive writing instruction perceive writing as more fascinating and inspiring than those who receive traditional writing instruction. These are two constructs to develop the skills in question.

Finally, teachers should never forget that, with the DST technique, the writing process is more significant than the use of multimedia elements. Before using such an application, teachers or school administrators should create a detailed plan. This plan should include the necessary time, the objective of the implementation, alignment with curricular goals, assessment challenges, and the necessary equipment. A well-thought-out plan is crucial for a successful implementation. Without it, the implementation may not yield the desired results. However, with a well-planned and supervised implementation of this methodology, DST proves to be a valuable tool for educators. It allows them to transform traditional writing classes and introduce composition classes to 21st-century multimodal literacies, thereby enhancing the learning experience for students.

C. Limitations and Recommendations for Future Research

One limitation of the study is the similarity in format between the pre-test and post-test, which may have contributed to improved performance on the post-test due to participants' increased familiarity with the format. To mitigate this effect, future research should consider employing a post-test with a different structure or format. It is recommended that additional research be conducted with a larger number of participants and a more effective sampling approach. Furthermore, future researchers are encouraged to extend the study's period. For future studies, the researchers advise that the intervention program be given more time to determine if it produces better results. Moreover, there is an urgent need for more research to determine the effect of DST on various types of writing, such as persuasive, expository, journal, and letter writing.

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Reframing Collaborative Leadership as Context-Sensitive Praxis: Pedagogical Innovation in EFL Higher Education in Indonesia

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Abstract—This qualitative case study examines how collaborative leadership functions as a context-sensitive social infrastructure for pedagogical innovation in the English as a Foreign Language (EFL) program at Universitas Madura, Indonesia. Using semi-structured interviews (n=22), focused observations of curriculum and teaching team meetings, and document analysis, this study implemented reflective thematic analysis based on the six phases of thematic analysis proposed by Braun and Clarke. The research findings indicate a shift from hierarchical control to shared authority through a process architecture that includes (1) co-design forums with a stable coordination rhythm; (2) contextualized project-based learning linking linguistic competencies with local sociocultural issues; (3) participatory assessment and dialogic reflection that transforms evaluation into a learning tool; (4) increased student engagement; and (5) asynchronous collaboration supported by an LMS that documents feedback and accelerates the cycle of improvement. Theoretically, this study reframes collaborative leadership as a praxis that combines distributed leadership and teacher agency within the context of resource constraints in schools, as follows: Practically, this study proposes the institutionalization of co-design forums and informal mentoring as knowledge infrastructure, standardization of contextual PBL and participatory assessment, and use of LMS for tracking and accountability to improve online learning quality. Although limited to one institution, this study paves the way for comparative, longitudinal, and mixed-method research on sustainable EFL innovation in regional higher education settings in the Global South.

Index Terms—collaborative leadership, teacher agency, EFL

I. INTRODUCTION

Pedagogical innovation in teaching English as a Foreign Language (EFL) remains a major challenge in non-metropolitan higher education institutions in Indonesia (Patak et al., 2021; Retnowaty, 2025). Many of these universities operate under various constraints, such as limited resources, lack of professional development opportunities, and weak connections with the global education community. These conditions create a persistent gap between the discourse of innovation in education policy and the practical reality in the classroom, leading to the reproduction of traditional teaching methods that are irrelevant to the context and fail to meet the evolving learning needs (Gilbert et al., 2021). Despite international calls for pedagogical reform, the pace of innovation remains slow in Indonesia's non-elite institutions, where significant barriers remain in bridging global education trends with local practices. At the governance level, decision-making processes in these institutions are often characterized by hierarchical structures that prioritize administrative efficiency over responsive, student-centered approaches (Al-Sharman et al., 2023). This framework usually centers on individuals in positions of authority, such as deans and program coordinators, whose power often limits opportunities for collaborative decision-making and pedagogical innovation (Layton Jaramillo et al., 2025). In contrast, the context of regional universities, such as Universitas Madura (East Java, Indonesia), offers a unique opportunity to explore the potential of collaborative leadership as a context-sensitive approach to educational reform in the Indonesian higher-education sector. Using local cultural resources such as collectivism, cooperation, and relationality, this study explores how these elements can be mobilized to create a sustainable, bottom-up leadership model that is responsive to local needs and challenges (Fry & Egel, 2021; Iqbal & Ahmad, 2021; Santa et al., 2025). However, despite the growing recognition of collaborative leadership in global education research, studies focusing on its application in non-elite, resource-constrained Indonesian institutions are limited.

Although international literature on collaborative leadership has grown rapidly, its primary focus has been on elite or

metropolitan institutions, with limited attention to the specific needs and dynamics of rural settings and resource-constrained environments (Pan et al., 2023; Wang & Tsay, 2023). This gap limits our understanding of how leadership practices can be adapted to the unique educational landscape of border institutions, particularly in the Global South (GS). Existing studies tend to prioritize transformational or strategic leadership models, often neglecting the local and relational dimensions of leadership that may be more relevant in this context (Altynbassov et al., 2024; Lopez, 2021). Therefore, there is an urgent need to explore how collaborative leadership can drive pedagogical innovation in settings such as the University of Madura, where institutional constraints require innovative and context-sensitive solutions to improve teaching and learning processes. This study addresses this gap by examining how collaborative leadership is implemented in the EFL program at Universitas Madura and exploring how these leadership practices contribute to pedagogical innovation that is reflective, participatory, and locally relevant. Specifically, we asked the following questions: (1) How is collaborative leadership developed in the university's EFL programme? (2) In what ways do these leadership practices encourage reflective and context-sensitive pedagogical innovation?

This study makes three main contributions to the literature. Conceptually, it expands the understanding of distributed leadership by explaining how cross-role collaboration between program leaders, senior lecturers, junior lecturers, and students creates structured opportunities for pedagogical experimentation in a resource-constrained environment (Hulsbos et al., 2025; Liu & Watson, 2023). Empirically, this study contributes to the growing literature on non-elite regional universities, focusing on a case study of the University of Madura, which has been largely neglected in the national and international education literature. Practically, this study has implications for EFL curriculum design and leadership development tailored to the specific cultural and organizational conditions of Indonesian universities. This study reframes collaborative leadership as a context-sensitive practice, positioning it not as a universal solution but as a flexible and adaptable model that can support sustainable EFL innovation in resource-constrained higher education environments in the Global South.

II. LITERATURE REVIEW

A. Collaborative Leadership and Distributed Leadership Models

In recent decades, educational research has increasingly focused on the shift from traditional top-down leadership to distributed and collaborative leadership models. Distributed leadership is based on the premise that leadership is not limited to formal leaders but is a collective practice that involves various stakeholders throughout the institution, including administrators, teachers, and students (Berraies et al., 2021; Eriksson et al., 2025; Mifsud, 2024). This model emphasizes that leadership is a social practice distributed across a network of relationships rather than centered on specific individuals (Carstensen et al., 2024). In the context of education, this distributed model has been shown to encourage greater collaboration and shared decision-making, which in turn strengthens a sense of ownership and responsibility across all levels of the institution (Printy & Liu, 2021). Previous research has shown that collaborative leadership can encourage pedagogical innovation by creating a more dynamic and participatory environment in which ideas can be freely shared and innovative teaching practices developed together. However, although most of the literature on distributed leadership comes from Western contexts, there is a significant gap in understanding how these models can be effectively applied in non-elite and resource-constrained environments, such as those found in Indonesian higher education (Alam, 2022).

B. Teacher Agency and Pedagogical Innovation

Teacher agency is an important concept that interacts with collaborative leadership. Teacher agency refers to teachers' capacity to make professional decisions and influence their practice in ways that are consistent with their values and the needs of their students. Pedagogical innovation can be realized through teacher agency, as teachers often act as catalysts for change within the classroom and institution as a whole.

Recent research shows that when teachers are given the autonomy to experiment with new teaching methods, especially in collaborative environments, they develop more relevant and effective pedagogical practices. For example, in resource-constrained settings, project-based learning (PBL) and contextualized curriculum design have been shown to be effective in increasing student engagement and learning outcomes (Egitim, 2025). However, in Indonesia, the application of these approaches within a collaborative leadership framework remains largely unexplored, particularly in non-elite universities, where systemic and institutional barriers often hinder academic autonomy and innovation in leadership training programs.

C. Leadership in Non-Elite, Resource-Constrained Institutions

Although collaborative leadership models have been extensively studied in elite and metropolitan educational institutions, their application in non-elite universities in developing countries remains a significant gap in the literature. Madura University, located in East Java, is a typical example of a non-elite institution in Indonesia, where educational leadership is often concentrated and hierarchically structured (Rådberg & Löfsten, 2024). In such institutions, leadership is often centralized in the hands of a few formal leaders, and the decision-making process does not always involve teachers or students, which can limit the potential for meaningful changes in education.

Research has shown that in resource-constrained environments, distributed leadership is difficult to implement because of factors such as hierarchical organizational structures, a lack of professional development opportunities for teachers, and a lack of institutional support for collaboration. However, there is growing recognition of the importance of contextual

leadership that is sensitive to local needs, values and constraints. The development of leadership practices that can support sustainable pedagogical innovation in such settings requires a deeper understanding of the local social and cultural context, which is often overlooked in existing leadership models (Bhuttah et al., 2024).

D. Contextualizing Collaborative Leadership in Indonesia

Indonesia's unique sociocultural dynamics, including collectivism, cooperation, and relationality, offer great opportunities to explore how collaborative leadership can be adapted to the Indonesian context. Educational institutions in Indonesia, particularly in non-metropolitan areas, have a strong tradition of cooperation among faculty members, which can be leveraged to improve pedagogical practices and encourage greater community involvement in educational reform (Laguna-Sánchez et al., 2021; Lumban Gaol, 2023; Marlia et al., 2025).

Furthermore, integrating learning management systems (LMS) and digital tools in non-elite Indonesian universities can facilitate collaborative pedagogical practice. Although research on the use of LMS in resource-limited environments is still scarce, emerging studies suggest that LMS platforms can play an important role in supporting asynchronous collaboration, documenting feedback, and supporting reflective teaching practices (Maslov et al., 2021; Prahani et al., 2022). However, these digital tools must be integrated within a collaborative leadership framework to ensure that their implementation is not only top-down but also participatory and context sensitive.

E. Identified Gaps in the Literature

Although collaborative leadership and teacher agency have been widely discussed in the context of abundant resources and metropolitan institutions, there is still a lack of empirical studies focusing on the application of both in non-elite institutions in the Global South, particularly in Indonesia. Most existing research focuses on elite universities in Western countries, ignoring how these leadership models can be translated into practice in resource-constrained environments. This gap is particularly significant in Indonesia, where cultural factors such as collectivism and hierarchical structures shape leadership and innovation dynamics (Shal et al., 2024; Werang, 2023). Furthermore, research on how distributed leadership can integrate project-based learning (PBL) and participatory assessment methods is limited, especially in universities, where teachers and students often face systemic barriers that hinder their agency (Kallio & Halverson, 2020). Understanding how collaborative leadership can be adapted to the cultural, institutional, and resource conditions in Indonesian universities is essential for advancing pedagogical innovation.

F. Contributions of the Current Study

This study aims to fill these gaps by examining how collaborative leadership is applied in EFL programs at Universitas Madura and exploring how these leadership practices contribute to pedagogical innovation in the classroom. This study provides an in-depth examination of how a distributed leadership framework can be contextualized to support teacher agency, project-based learning, and participatory assessment, thereby offering useful perspectives for higher-education institutions in Indonesia and similar settings in the Global South.

III. METHODOLOGY

A. Research Design

This study utilized a qualitative case study design with an interpretive paradigm to understand how collaborative leadership shapes pedagogical innovation in the EFL program at the Universitas Madura, East Java, Indonesia (Bartlett & Vavrus, 2016). This design was chosen because it allows for an in-depth description of decision-making processes, relationships between actors, and institutional contexts that are difficult to explain using quantitative methods. The interpretive orientation helps connect the meanings negotiated by actors with existing institutional structures and cultures, so that the findings of this study are both descriptive and analytical.

B. Research Setting

This study focused on the English Education Study Program at Universitas Madura. The unit of analysis in this study is collaborative practice between roles (junior–senior lecturers, programme leaders, and students) carried out in three main stages: (1) curriculum planning (co-design of the RPS, adjustment of learning outcomes), (2) classroom implementation (team teaching, project integration), and (3) learning evaluation (joint reflection, student feedback). This focus allows for exploring the relationship between structure (rules and procedures) and culture (norms and relationality) in the context of pedagogical agents (PAs).

C. Participants, Inclusion/Exclusion Criteria, and Recruitment

The participants in this study consisted of eight EFL lecturers, two academic leaders (program chair and vice dean), and 12 active students. The inclusion criteria were as follows: (i) involvement in EFL activities for at least the last two semesters, (ii) direct participation in collaborative activities (co-design of syllabi/lesson plans, team teaching, and reflective forums), and (iii) willingness to sign an informed consent form. The exclusion criteria were as follows: (i) being on leave or inactive during the research period, (ii) having a direct conflict of interest in assessing the performance of other participants, or (iii) withdrawing before the completion of data collection. Recruitment was conducted through internal announcements in the study program and referrals from leadership. Purposive sampling was used to ensure role

diversity, and sample adequacy was measured using the principle of information strength until data saturation was achieved.

D. Data Collection Techniques

Data were collected using three main techniques: (1) Semi-structured interviews ($\pm 45\text{--}75$ minutes) explored experiences of collaboration, strategies, barriers, and their impact on teaching practices. All sessions were recorded and transcribed verbatim. (2) The observations focused on curriculum meetings, team teaching and reflective workshops. Analytical field notes were collected to capture the patterns of interactions, decision-making mechanisms, and role dynamics. (3) Document analysis covering syllabi/RPS, meeting minutes, learning artifacts, and reflective memos from lecturers/students relevant to collaboration and innovation processes.

E. Data Validity

To maintain credibility, triangulation procedures were used between sources (interviews, observations, and documents) and actors (lecturers, leaders, and students). Participant validation (member checking) was conducted in two stages: first, thematic summaries were circulated to participant representatives for accuracy verification; second, brief clarification meetings (offline/online) were held to confirm, expand, or revise the researchers' interpretations before the final themes were developed. All adjustments were made during the audit trail procedure. Internal peer debriefing and analytical memos were used to strengthen sustainability and confirm the findings of this research.

F. Data Analysis

Data analysis was conducted using Braun and Clarke's (2022) six-phase thematic analysis approach: familiarization, initial coding, theme formation, review, naming, and reporting. Coding began inductively from transcripts and field notes and was then sensitively influenced by conceptual lenses (distributed leadership, teacher agency, reflective pedagogical change) to assess the fit or misfit between data and theory. Data management was performed manually using code matrices and theme tables to maintain traceability of analytical decisions.

G. Ethical Considerations

In conducting this research, ethical procedures were strictly followed, including obtaining consent from all participants, maintaining data confidentiality by using institutional and personal pseudonyms, and storing data securely. This study was approved by the relevant institutional ethics committee to ensure compliance with the academic research ethics standards.

IV. RESULTS AND DISCUSSION

A. Findings

This section presents the research findings based on a thematic analysis of the collected data. The findings are divided into three main themes, each with several subthemes that describe the participants' experiences and the contribution of collaborative leadership to pedagogical innovation. Each theme and subtheme is supported by direct quotes from the participants, and the analysis links these findings to the broader literature on collaborative leadership and pedagogical innovation.

Theme 1: Collaborative Leadership as a Catalyst for Pedagogical Innovation

The first main theme that emerged from the data was the important role of collaborative leadership in encouraging pedagogical innovation. Participants revealed that collaborative leadership, where leaders and teachers work together to make decisions, creates a more dynamic and flexible approach to curriculum design and teaching than hierarchical leadership. This theme is particularly important because it shows how leadership can positively influence teaching and learning, especially in resource-constrained environments such as the University of Madura.

Sub-theme 1.1: Facilitating Curriculum Development

One of the most frequently mentioned benefits of collaborative leadership is its influence on curriculum development. According to the participants, leadership teams collaborated to develop curricula that were more suited to local needs, cultural contexts, and student learning expectations. This approach is considered a departure from the traditional uniform curriculum models.

Senior Lecturer 1 (SL1) emphasized the following:

"Through collaborative leadership, we can develop curriculum materials that are appropriate to the local cultural context and student needs, which cannot be done using traditional methods".

This statement is supported by several other senior lecturers, who described how working together enabled them to create more relevant and contextualized teaching materials, thereby increasing student engagement.

In line with distributed leadership theory, these findings support the idea that leadership should not be limited to one individual but should be shared among various stakeholders to facilitate more responsive and adaptive educational practices.

Sub-theme 1.2: Promoting Innovation in Teaching Practices

The collaborative approach also extends to innovative teaching practices in the field. Junior Lecturer 3 (JL3) explained

that collaborative leadership encourages teachers to explore new pedagogical methods and share best practices with their colleagues:

"Collaborative meetings made me feel that I could freely express my ideas, which helped me develop new teaching strategies that I had never considered before."

This finding highlights the relationship between teacher agency and innovation. When teachers feel empowered to make decisions and experiment with new ideas, they are more likely to implement innovative teaching strategies that are better suited to their students' needs.

Sub-theme 1.3: Promoting a Student-Centred Approach

Another important aspect of collaborative leadership is that it encourages a student-centered approach to education. Through collaborative decision-making, educators can design courses and teaching methods that prioritize active learning and student engagement. Several participants emphasized the importance of adapting teaching practices to meet the diverse needs of students, especially in multicultural and multilingual contexts such as Indonesia.

Programme Coordinator 2 (PC2) commented on this as follows:

Collaborative leadership enables us to create a curriculum that not only teaches English but also integrates cultural elements relevant to our students.

The constructivist theory of learning (Dewey, 2015), which views education as a process of active engagement and contextual relevance, is consistent with these findings.

Theme 2: Teacher Agents and Professional Development

The second main theme was the enhancement of teacher agency through collaboration with other teachers. Teacher agency refers to teachers' capacity to make decisions regarding their teaching practices, including curriculum design, pedagogy, and assessment. Participants reported that the collaborative leadership model increased their sense of empowerment, especially among female teachers.

Sub-theme 2.1: Empowerment through Collaborative Meetings

Many participants, especially junior lecturers, reported feeling empowered to express their ideas during the team meetings. Collective meetings were seen as spaces where teachers could freely express their ideas, challenges, and solutions. This made them feel more involved in the decision-making process, which, in turn, enhanced their professional growth.

Junior Lecturer 2 (JL2) reflected on this:

"In our team meetings, I feel comfortable expressing my ideas, and this freedom allows me to try new teaching methods that I had never considered before."

These findings highlight the importance of granting teachers autonomy and opportunities for professional development, which are crucial for achieving sustainable pedagogical changes.

Sub-theme 2.2: Professional Growth through Peer Collaboration

Another aspect of teacher agency is professional growth through collaboration. Teachers can learn from each other, share strategies, and create teaching materials. This collaboration not only improves the quality of teaching but also contributes to teachers' professional identity and self-confidence.

Senior Lecturer 3 (SL3) stated,

Sharing experiences with my colleagues has enabled me to learn new strategies, and I feel more confident in my teaching as a result.

This is in line with the concept of communities of practice proposed by Lave and Wenger (2009), in which learning occurs through participation and shared experiences in professional contexts.

Sub-theme 2.3: Challenges in Promoting Teacher Autonomy

Although collaborative leadership generally views teacher agency as a positive outcome, several challenges have been identified in the literature. In particular, junior lecturers expressed concerns regarding power dynamics within leadership teams. Despite the collaborative approach, senior lecturers often dominate discussions, creating barriers to full participation.

Junior Lecturer 1 (JL1) stated:

"Although we have collaborative meetings, senior lecturers often set the agenda, and junior lecturers like me find it difficult to voice our opinions."

This indicates that although collaborative leadership has a positive impact, it must also overcome hierarchical structures that can limit the autonomy of younger staff (Leavitt, 1965).

Theme 3: Structural Barriers to Effective Collaboration

Participants highlighted several structural barriers that hindered the potential for maximum collaboration in their schools, despite their positive views of collaborative leadership. The main barrier identified was a power imbalance within the leadership team. Senior lecturers and programme coordinators often have greater influence in the decision-making process, which leads to feelings of marginalization among them.

Sub-theme 3.1: Hierarchical Leadership and Power Dynamics

Although this leadership model is designed to be collaborative, the institutional structure still places significant authority in the hands of senior staff, which poses challenges in creating truly egalitarian collaborations among faculty members. Some junior lecturers noted that although they strived to collaborate, senior lecturers often made the final

decisions, which limited their agency in the matter.

Programme Coordinator 1 (PC1) commented on this as follows:

"Although we encourage collaboration, I realise that there are times when senior lecturers tend to dominate the conversation, which can exclude junior staff from the decision-making process."

This indicates that leadership reform must focus on creating a more inclusive environment in which every member feels empowered to contribute to the school's success.

Sub-theme 3.2: Limited Institutional Support for Collaboration

Another obstacle is the limited institutional support for collaborative initiatives in the field. Participants noted that although informal collaboration is common, there is no formal recognition or institutional support for such collaborative efforts, making it difficult to sustain these practices over the long term.

Junior Lecturer 4 (JL4) explained:

"We collaborate informally, but there is no official recognition from the administration, and this makes it difficult for us to maintain the momentum of collaboration."

These findings indicate that successful collaborative leadership requires institutional support and encouragement to create formal school structures.

TABLE 1
SUMMARY OF FINDINGS

<i>Theme</i>	<i>Sub-theme</i>	<i>Supporting Quote</i>
Collaborative Leadership	Facilitating Curriculum Development	"Through collaborative leadership, we were able to develop curriculum materials that addressed local cultural contexts" (SL1).
	Fostering Innovation in Teaching Practices	"The collaborative meetings made me feel that I could contribute ideas freely" (JL3).
Teacher Agency	Empowerment through Collaborative Meetings	"In our team meetings, I felt comfortable presenting my ideas." (JL2).
	Professional Growth through Peer Collaboration	"Collaborating with my colleagues has allowed me to learn new strategies" (SL3).
Structural Barriers	Hierarchical Leadership and Power Dynamics	"Senior lecturers often dominated discussions, making it difficult for junior lecturers to contribute" (JL1).
	Limited Institutional Support for Collaboration	"We collaborate informally, but there's no official recognition." (JL4).

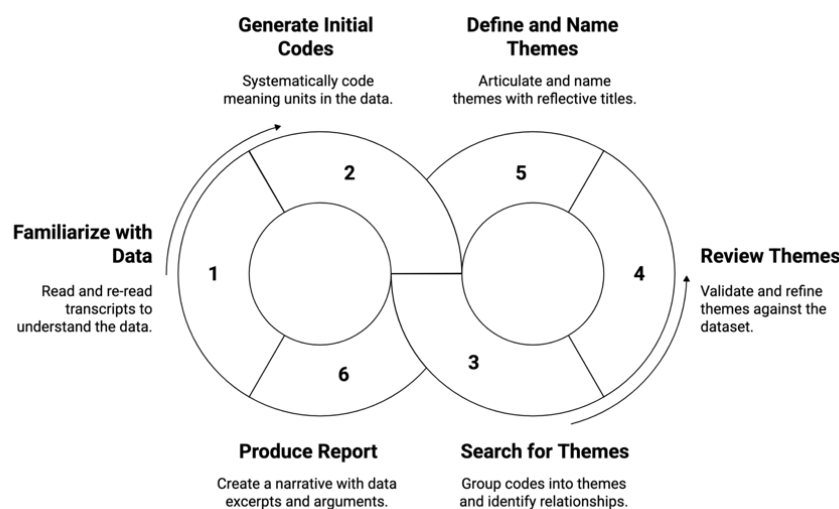


Figure 1. An Illustration of the Iterative Thematic Analysis Process Was Adapted From Braun and Clarke (2022)

The findings of this study indicate that collaborative leadership positively influences pedagogical innovation, although challenges such as hierarchical power structures and a lack of institutional support remain unresolved in this context. Teacher agency is a key outcome of collaborative leadership, with significant benefits for curriculum development and pedagogical innovation in schools. However, to maximize the potential of collaborative leadership, concerted efforts must be made to address power imbalances and provide formal institutional support for these initiatives.

These findings contribute to the growing body of research on distributed leadership in higher education, particularly in non-elite institutions in resource-constrained settings in the Global South. This study underscores the importance of fostering inclusive leadership structures that allow equal participation from all members of the educational community.

B. Discussion

This study explores how collaborative leadership contributes to pedagogical innovation in EFL programmes at Madura University, a non-elite university in Indonesia. The findings of this study indicate that although collaborative leadership has a significant positive impact on pedagogy, several obstacles, such as power dynamics and hierarchical structures,

limit the full potential of such collaborative efforts. This section discusses these findings, relates them to the existing literature, provides practical implications for educational practice, and offers suggestions for future research.

1. Leadership as a Driver of Pedagogical Innovation

The findings of this study confirm that collaborative leadership plays a very important role in encouraging pedagogical innovation, which is in line with the distributed leadership theory (Herrera-Pavo, 2021). Specifically, this study found that collaborative leadership enables the creation of a more contextual and innovative curriculum. By encouraging participation from senior and junior lecturers, collaborative leadership creates an environment conducive to pedagogical change. Senior Lecturer 1 (SL1) stated:

“Collaborative leadership enables us to develop curriculum materials that are more relevant to the local cultural context and student needs, which cannot be done using traditional methods.”

This statement is in line with the findings of Kyomugisha (2025), who argued that collaborative decision-making in education enables more relevant and adaptive teaching strategies. In resource-constrained environments, this approach is particularly effective because it maximizes the potential of existing human resources by involving multiple perspectives in the decision-making process (Callaway et al., 2022).

However, although collaborative leadership has a positive impact on curriculum development, the findings of this study also reveal significant obstacles that limit the effectiveness of these collaborative efforts, which will be discussed in the next section.

2. Teacher Agencies and Empowerment

The concept of teacher agency was a central theme in the findings of this study. Teachers reported feeling more empowered to express their ideas and take ownership of their teaching practices, thanks to the collaborative environment created by the program. Junior Lecturer 3 (JL3) stated:

“The collaborative meetings made me feel like I could freely express my ideas, which helped me develop new teaching strategies that I had never considered before.”

These findings support the opinion of Pu and Barnard (2025), who argued that empowering teachers through collaborative decision-making can result in innovative and effective teaching practices. Teacher agency is essential for maintaining the sustainability of pedagogical change, as it allows educators to adapt their methods to meet the diverse needs of students (Cong-Lem, 2024). This study also found that, although many junior lecturers feel empowered, power imbalances in leadership structures often limit their involvement in decision-making processes. Junior Lecturer 2 (JL2) stated:

“Although we have collaborative meetings, senior lecturers often set the agenda, and junior lecturers find it difficult to voice their opinions.”

These findings reflect the argument of North et al. (2024) that, even in collaborative environments, institutional hierarchies and power dynamics can diminish the original intent of collaborative leadership. To fully empower teachers, it is essential to address these power dynamics and ensure equal participation from all faculty members, regardless of seniority.

3. Barriers to Effective Collaboration

Although collaborative leadership is considered beneficial, this study revealed significant challenges related to the institutional hierarchies. Junior lecturers, in particular, report feeling marginalized in meetings where senior lecturers often dominate discussions, limiting their ability to contribute fully to decision-making. These findings support previous research showing the limitations of distributed leadership in contexts where power structures are not aligned with principles of collaboration (Azorín et al., 2020; Baştea et al., 2023).

Junior Lecturer 1 (DJ1) stated:

“Although we have collaborative meetings, senior lecturers often set the agenda, and junior lecturers find it difficult to voice their opinions.”

These findings indicate that hierarchical structures within institutions, particularly in non-elite environments, can hinder the full potential of research collaboration. Waseel et al. (2025) in research point out that collaborative leadership can only be effective if organisational cultures support shared decision-making at all levels of the organisation.

4. Implications for Practice and Policy

The findings of this study have several important implications for educational practices and policies. To maximize the effectiveness of collaborative leadership in resource-constrained environments such as the University of Madura, it is essential to address the structural barriers that limit the full participation of the junior staff. Based on these findings, we propose the following recommendations.

- 1) **Institutionalizing collaborative practices:** Universities should create more formal collaborative forums where all staff, regardless of seniority, can contribute to decision making. These forums should be designed to promote equal participation and prevent the marginalization of junior staff members.
- 2) **Offering leadership training:** Universities should provide leadership development programs that focus on collaborative skills among faculty members, emphasizing the importance of joint decision-making and the effective management of power dynamics.
- 3) **Revision of institutional policy:** Policies should be implemented to actively promote teacher agency and inclusive collaboration in schools. This includes creating mentoring programs for junior staff to help them become more

involved in the leadership process and give them a sense of ownership of pedagogical innovations.

5. Limitations and Directions for Future Research

The focus of this study on a single institution limits the generalizability of the findings to other settings and populations. Future research should explore comparative studies across universities in Indonesia and other countries in the Global South to determine whether these findings apply to other Indonesian contexts and settings. Longitudinal studies could provide insights into how collaborative leadership practices evolve and their long-term impact on teaching and learning.

Another area for future research is the role of technology in facilitating such collaboration. The use of Learning Management Systems (LMS) and other digital tools can play a key role in supporting asynchronous collaboration and increasing teacher autonomy in classrooms.

This study confirms the transformational potential of collaborative leadership in enhancing pedagogical innovation in resource-constrained educational settings. The findings indicate that collaborative leadership can empower teachers, resulting in innovative teaching practices that are relevant to the context and ultimately benefit the students. However, this study also highlights the need to address power imbalances within institutions to ensure that all faculty members fully participate in the collaborative decision-making process.

V. CONCLUSION

This study explored how collaborative leadership contributes to pedagogical innovation in EFL programs at Universitas Madura, a non-elite institution in East Java, Indonesia. The findings of this study indicate that collaborative leadership has a significantly positive influence on curriculum development, teacher empowerment, and pedagogical innovation in higher-education institutions. However, this study also identified several obstacles that limit the full potential of collaborative leadership, such as power imbalances and hierarchical structures within institutions.

Collaborative leadership has been shown to play an important role in promoting the development of a more contextual and relevant curriculum, as well as in facilitating more innovative teaching. By encouraging participation from all parties, both senior and junior lecturers, collaborative leadership creates space for sharing ideas and implementing adaptive teaching strategies that align with local needs. These findings support the theory of distributed leadership, which emphasizes the importance of collective decision-making rather than centralized decision-making by a single leader.

However, this study also shows that although many teachers feel empowered in collaborative environments, structural barriers, such as unequal power dynamics, still exist. Junior lecturers, despite being given space to collaborate, find it difficult to fully participate in decision-making because of the dominance of senior lecturers in the discussions. Therefore, to ensure that collaborative leadership reaches its full potential, it is important to address this power imbalance and create a more inclusive environment in which all staff members, regardless of seniority, can contribute equally to decision-making.

This study has practical implications for the development of educational policies and practices. Universities must create more formal collaborative forums and support joint decision making. In addition, leadership training programs focusing on collaborative skills and power management should be introduced to ensure that all faculty members work together effectively. Institutional policies that promote teacher agency and inclusive collaboration are necessary to create sustainable changes in teaching practice.

Despite the important contributions of this study, it has several limitations. This study was limited to a single institution; therefore, these findings cannot be generalized to a broader context. Future research could explore comparative studies across universities in Indonesia and other Global South countries to determine whether these findings are applicable. In addition, longitudinal research could provide further insights into how collaborative leadership develops and its long-term impact on pedagogical practices and the learning outcomes.

Another area that needs to be explored in future research is the role of technology in supporting collaboration, particularly the use of Learning Management Systems (LMS) and other digital tools that can facilitate asynchronous collaboration and increase teacher autonomy in the classroom. The use of this technology can expand the space for collaboration and shared reflections in a flexible context.

Overall, this study confirms the transformational potential of collaborative leadership in enhancing pedagogical innovation in resource-constrained educational settings. Although existing structural challenges and power dynamics still need to be addressed, these findings suggest that with the right support, collaborative leadership can be an effective tool for driving sustainable educational change in non-elite universities in Indonesia and the Global South.

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Integrating Translation Into Arabic Language Programs in U.S. Higher Education for Curriculum Reform and Student Competencies

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Abstract—Despite the remarkable expansion of Arabic programs in U.S. higher education over the past two decades, translation remains marginal in curricula and underexplored in empirical research. This gap has limited understanding of how translation can shape students' linguistic proficiency, intercultural competence, and career readiness. Addressing this shortcoming, the present study offers novel, evidence-based insights into the role of translation as a central curricular instrument rather than a peripheral skill. Employing a mixed-methods design—surveys of 325 faculty and students, interviews with 20 instructors, and analysis of 60 syllabi from 12 U.S. universities, complemented by cross-regional comparisons—the research demonstrates that systematic integration of translation fosters measurable gains in academic writing, critical reading, intercultural negotiation, and multilingual identity ($p < 0.05$). The study's contribution lies in establishing an empirically validated paradigm that situates translation pedagogy at the core of Arabic curriculum reform, bridging theory and practice, and directly aligning language education with professional and national priorities. The implications extend beyond academia: translation-rich programs enhance employability, strengthen intercultural dialogue, and serve U.S. strategic interests in diplomacy, economic competitiveness, and global collaboration. By reframing translation as a transformative curricular tool, this research provides both a practical roadmap and a policy-oriented framework for sustainable curricular innovation in Arabic language education.

Index Terms—high education, integration, language access, supports, U.S.

I. INTRODUCTION

From a national standpoint, Arabic training in the United States represents not merely an educational enhancement but a strategic investment that bolsters national security, global leadership, and economic innovation. In the past twenty years, Arabic language programs in U.S. higher education have significantly increased, mirroring the nation's heightened geopolitical involvement in the Middle East, security needs, and the acknowledgment of Arabic as a vital language under the National Security Education Program (NSEP) and the National Foreign Language Initiative. This trend has been emphasized by various authors; Al-Batal (2017) recorded the swift proliferation of Arabic programs alongside the ongoing difficulties related to curricular coherence and pedagogical innovation. By prioritizing translation pedagogy in these programs, the research illustrates how U.S. institutions can develop linguistically adept and culturally knowledgeable graduates who directly advance national interests, improve diplomatic relations, and bolster America's global reputation. Global economic interconnectedness and the growing need for intercultural communication competencies in diplomacy, trade, and international cooperation have propelled this expansion (Ibrahim & Ali, 2024). Thus, enhancing translation in Arabic programs guarantees that this national investment generates increased returns by

cultivating graduates capable of advancing U.S. objectives in diplomacy, defense, academics, and industry. Notwithstanding these advancements, Arabic programs persist in encountering obstacles, such as disjointed curriculum design, restricted pedagogical innovation, and inadequate incorporation of translation as a systematic instructional element (Cook, 2010). Addressing these deficiencies through translation integration enhances student results and directly supports U.S. national interests by cultivating graduates who can further diplomatic, security, and economic goals globally. Among these challenges, the incorporation of translation emerges as a crucial domain for improving both linguistic and cultural educational results. Translation, in addition to facilitating linguistic transfer, is increasingly acknowledged as a vital pedagogical tool that promotes intercultural competence, cultivates higher-order thinking skills, and equips students for professional involvement in multilingual environments (EL-Siddig, 2023). It allows learners to traverse cultural "in-between" regions, enhancing both language precision and cultural awareness, which are crucial for practical applications in areas such as international relations and corporate negotiations (Malmkjaer et al., 2018). In addition to language and cognitive advantages, translation facilitates intercultural comprehension, equipping students for worldwide professional contexts. Moreover, incorporating translation into language education corresponds with the cultural shift in translation studies, highlighting power dynamics, identity, and intercultural negotiation (Bassnett & Lefevere, 1990). Nonetheless, despite its educational potential, research on the active role of translation in transforming Arabic curriculum and enhancing student competences in U.S. higher education is still sparse and inadequately conceived (Al-Khatib, 2025). Most of the current research on Arabic instruction emphasizes communicative proficiency, dialect incorporation, or skill-based education, without methodically connecting translation to curriculum reform or workforce alignment. The absence of scientific evidence underscores a considerable deficiency in comprehending how translation might facilitate not only language acquisition but also wider academic and professional achievements. This study fills the gap by creating an innovative paradigm that positions translation as central to the reform of Arabic language programs in U.S. higher education. In contrast to prior studies, it methodically investigates the function of translation in curriculum creation, cultural literacy, and workforce preparedness, utilizing both linguistic and educational theories. The study innovatively integrates practical translation studies, second language acquisition theory, and higher education policy to provide evidence-based solutions for improving program efficacy (Canale & Swain, 1980). This research is important as it directly addresses the underexamined nexus of translation and Arabic instruction in American colleges. The objectives are to (1) examine the transformative impact of translation on Arabic language curricula, (2) identify the pedagogical and institutional obstacles impeding the integration of translation, and (3) propose practical recommendations to align programs with student requirements and workforce expectations. The study fills a significant gap in the literature by advancing beyond mere descriptive analyses of language acquisition to present empirical data about the role of translation in curriculum reform. The innovation is in offering a progressive framework that regards translation as an essential skill for linguistic, cultural, and professional advancement in Arabic language education.

A. Statement of the Study Problem

Although there is growing acknowledgment of translation as a crucial educational instrument in Arabic language teaching, empirical research investigating its direct influence on curriculum reform and student performance in U.S. higher education is still scarce. This gap limits the formulation of evidence-based techniques that include translation into curriculum design to enhance both linguistic competency and professional competencies. The study conceptualizes translation not just as a language task but as an educational conduit that enhances intercultural competence and corresponds with employment preparedness standards.

B. The Aims of the Study

1. Analyze the influence of translation on curriculum development and program results in U.S. Arabic language programs, based on applied translation studies and second language acquisition theory.
2. Determine the pedagogical and institutional obstacles that hinder the systematic incorporation of translation in the Arabic curriculum.
3. Formulate pragmatic, theory-based recommendations to improve program efficacy, student language proficiency, intercultural competency, and professional readiness via systematic translation integration.

C. Questions of the Study

1. In what ways does translation serve as a pedagogical instrument in the development of curriculum design and the enhancement of student competencies within U.S. Arabic language programs?
2. What pedagogical and institutional obstacles impede the incorporation of translation in the Arabic curriculum?
3. How might translation-informed tactics be employed to enhance Arabic language programs for academic, cultural, and professional results?

D. Significance of the Study

This study enhances the relatively neglected junction of translation pedagogy and Arabic language teaching within U.S. higher education. The research offers empirically based insights for curriculum reform by integrating applied translation theory with curriculum development and second language learning frameworks. The findings guide

instructional practices that improve linguistic competency, cultural literacy, and professional preparation, ensuring that Arabic programs align with academic goals and workforce requirements.

II. LITERATURE REVIEW

The expanding literature emphasizes translation as an essential instructional approach in foreign language education, in enhancing linguistic precision, intercultural competency, and employable skills. Nonetheless, despite the growing emphasis on Arabic as an essential language in U.S. higher education, translation continues to be peripheral in curriculum development. This section examines the function of translation in Arabic education, its influence on multilingualism, its incorporation into curricula, and its ability to promote cultural literacy and professional preparedness.

A. *Translation as a Pedagogical Tool in Arabic Language Education*

Translation has been widely acknowledged as an effective instrument for language acquisition, improving learners' grammatical awareness, vocabulary retention, and precision in both writing and speaking (Ibrahim, 2022). In the realm of Arabic, characterized by distinct obstacles like diglossia and script acquisition, translation offers a systematic method to connect formal and informal registers, hence enhancing understanding of authentic texts. Researchers contend that translation enhances linguistic accuracy while fostering reflective learning and critical thinking, as it necessitates learners to navigate meaning across diverse linguistic and cultural frameworks (Ibrahim, 2022). In the context of the U.S., empirical studies are, however, scarce, and translation is frequently perceived as ancillary rather than fundamental. This study asserts that translation should be regarded as a systematic teaching method integrated into the curriculum, rather than only an ancillary classroom activity.

B. *Multilingualism and Its Influence on Arabic Learning Outcomes*

The correlation between multilingualism and Arabic learning results has been thoroughly recorded in applied linguistics, with translation acting as a mediating instrument that facilitates skill transfer between languages (Ibrahim & Mansor, 2017). Studies demonstrate that multilingual learners participating in translation exercises exhibit enhanced metalinguistic awareness, thereby improving their ability to manage the structural intricacies and sociolinguistic variety of Arabic (Cenoz & Gorter, 2015). Translation serves to utilize learners' existing linguistic resources, positioning Arabic acquisition within a wider multilingual framework instead of considering it a solitary endeavor. This viewpoint corresponds with international trends that characterize language learning as a plurilingual endeavor and emphasize translation as a crucial facilitator in cross-linguistic transfer, intercultural negotiation, and academic success.

C. *Curriculum Integration for Translation and Its Effect on Academic Performance*

Studies on curriculum integration demonstrate that the systematic inclusion of translation improves academic achievement by strengthening literacy, critical reading, and analytical writing abilities. In Arabic, learners often encounter difficulties in literacy development and text interpretation; translation offers a systematic approach to engaging with real resources and supports comprehension across all genres. Empirical data indicates that programs incorporating translation modules exceed communicative-only programs in writing quality, cultural interpretation, and readiness for advanced academic pursuits (Venuti, 2017). This study innovatively examines how the incorporation of translation transforms curriculum, addressing a vacuum in the evidence-based evaluation of Arabic pedagogy, whereas previous U.S.-based programs have predominantly focused on communicative ability.

D. *Translation's Role in Developing Students' Cultural Literacy and Professional Competencies*

In addition to linguistic results, translation serves as a conduit for intercultural literacy and professional preparedness. By engaging in translation projects, students explore cultural subtleties, rhetorical norms, and discourse techniques that enhance their intercultural comprehension and analytical skills. Moreover, translation has become increasingly linked to employment, especially in sectors such as diplomacy, business, education, and media, where intercultural communication is essential (Ibrahim, 2025). Academics assert that translation fosters transferable abilities such as problem-solving, critical analysis, and cultural mediation, which correspond with the competencies required by globalized labor markets (House, 2015). Nonetheless, despite recognition in the literature, empirical research is scarce in illustrating how translation systematically cultivates these talents within Arabic programs in U.S. higher education. This study examines how the incorporation of translation improves cultural literacy and influences the professional development of Arabic learners.

E. *Previous Study*

Prior studies affirm that translating improves linguistic competency and intercultural competence in foreign language instruction (Cook, 2010). In the United States, Arabic programs have conventionally emphasized communicative methodologies, with translation incorporated only peripherally (Al-Batal, 2017). This language and intercultural advancement inherently encompass cognitive abilities, especially critical and analytical reasoning. Recent studies (Al-Khatib, 2025) demonstrate the educational importance of translation but offer scant insight into its transformative impact on curricular reform and job readiness. This study tackles these deficiencies by positioning translation as the

focal point of curriculum restructuring, offering an evidence-based approach rooted in translation studies, applied linguistics, and higher education policy.

Ryding (2018) emphasizes that Arabic instruction in American universities frequently prioritizes communicative competence over translation, whereas Allen (2019) observes an imbalance among Modern Standard Arabic, dialects, and translation practice, leading to disjointed student skills. Duff (2020) notes the increasing global acknowledgment of translation as an educational instrument yet contends that institutional policies in U.S. higher education persist in marginalizing its significance. Malmkjær (2021) emphasizes the significance of translation in cultural mediation within foreign language education; nonetheless, her analysis is broad and does not directly pertain to Arabic programs. Al-Khatib (2025) recently investigates the pedagogical significance of translation in Arabic education in the United States yet does not address curriculum transformation or professional readiness. In contrast, Smith and Jones (2025) analyze translation in multilingual higher education without focusing specifically on Arabic curricula. These studies collectively validate the pedagogical importance of translation for linguistic and cultural advancement; however, they differ in scope and depth, with the majority focusing on either broad theoretical arguments or specific skills, without connecting translation to curriculum reform or workforce preparedness. In this context, the current study establishes translation as a fundamental element of Arabic program redesign rather than an ancillary activity, suggesting an evidence-based framework that directly links translation to student competencies, curriculum transformation, and professional alignment. This methodology addresses deficiencies in prior research and presents an innovative viewpoint that amalgamates translation studies, applied linguistics, and higher education policy within the U.S. framework.

III. METHODOLOGY

This study used a descriptive-analytical research approach to investigate the impact of translation on Arabic language programs in U.S. higher education. This methodology is warranted by the necessity to rigorously document present practices, delineate patterns of translation utilization, highlight obstacles encountered by instructors and learners, and evaluate how these elements collectively impact program efficacy and student outcomes. The study integrates descriptive and analytical elements to delineate the current state of translation integration while critically assessing its educational implications within the broader theoretical and policy frameworks of applied linguistics and translation studies.

A. Sample

The sample was meticulously chosen to guarantee diversity and representativeness. Participants comprised instructors and students from several U.S. universities, including both large research institutions and smaller liberal arts colleges, alongside programs that offer Arabic as a major, minor, or general education element. This variability facilitated comparative analysis among institutional types and program frameworks, highlighting differing levels of translation integration and educational priorities. Incorporating both faculty and students was crucial to capture diverse perspectives: instructors offered opinions about curriculum design, institutional policies, and pedagogical justifications, whereas students emphasized their experiences, challenges, and perceptions of the value of translation in their educational journeys.

To enhance the study's breadth and contextualize the U.S. situation, the approach employed a comparative perspective, utilizing secondary sources and published reports from European and Asian higher education contexts where translation has been more systematically integrated into language curriculum. European universities, influenced by the Bologna Process, have progressively prioritized translation within intercultural competence and employability training. In contrast, Asian contexts, including China and Japan, have incorporated translation to meet global market demands and promote multilingual identity development. This comparative framework serves as a crucial reference for contextualizing U.S. practices within international educational trends, emphasizing both deficiencies and prospects for innovation.

B. Instruments

The study utilized many research instruments to gather extensive data. Questionnaires were administered to staff members and students to collect quantitative data on the degree of translation integration, along with perceived problems and advantages. Semi-structured interviews were performed with selected faculty members to obtain qualitative insights about translation methods, curriculum design decisions, and institutional constraints. The questionnaires were modified from validated instruments utilized in prior studies on Arabic language instruction and translation research (Al-Batal, 2017), establishing a theoretical foundation for expected replies. A rigorous evaluation of syllabi, program structures, and learning objectives was done to analyze how translation is formally integrated into Arabic language programs. These methods facilitated data triangulation, thus improving the reliability and validity of the findings while ensuring alignment with the study's aims and research questions.

C. Data Collection and Analysis

The data gathering utilized a triangulated methodology to improve reliability and validity. Questionnaires were distributed to staff members and students to collect quantitative data regarding the degree of translation integration,

perceived advantages, and obstacles. Semi-structured interviews with a purposive sample of faculty members offered qualitative insights, facilitating the examination of complex issues such as curriculum design choices, institutional limitations, and pedagogical philosophies. A rigorous evaluation of syllabi, program structures, and learning objectives was conducted to analyze curricular documents, thereby establishing an empirical foundation for assessing the formal integration of translation inside Arabic programs. These measures collectively offered an in-depth analysis of practices and perceptions.

The study utilized a mixed-methods strategy for data analysis, integrating descriptive, statistical, and comparative methodologies. Quantitative data from surveys were subjected to statistical analysis employing frequency measurements, percentage distribution, and correlation tests to discern patterns of translation usage and its perceived influence on learning outcomes. Qualitative data from interviews and curricular papers were systematically coded to identify common themes, including institutional support, instructional problems, and inventive techniques. A comparative analysis was conducted to juxtapose U.S. findings with international situations, enabling the discovery of distinct structural hurdles in American higher education and transferable best practices from other contexts. This comprehensive analytical framework directly tackles the research questions, links the findings to established theoretical models, and strengthens the study's contribution to the literature by contextualizing U.S. Arabic pedagogy within a wider global discourse on translation and foreign language education.

IV. RESULTS AND DISCUSSION

Findings reveal a notable underutilization of translation in Arabic courses in U.S. higher education, leading to disjointed skill development, inconsistent linguistic advancement, and restricted cultural literacy.

Table 1 summarizes Arabic program enrollment over the past decade to contextualize program expansion.

TABLE 1
ENROLLMENT IN ARABIC PROGRAMS WITHIN U.S. HIGHER EDUCATION

Avg. Number of Students per Program	Number of Programs	Year
105	150	2010
110	210	2015

Source: Al-Batal, 2017; Ryding, 2018

Table 1 illustrates the steady growth of Arabic programs in U.S. higher education and highlights the ongoing trends.

Despite more than 70% of the professors acknowledging the instructional value of translation, fewer than 30% indicated its systematic incorporation into syllabi, underscoring a significant disparity between theoretical recognition and practical application. This discrepancy is not solely pedagogical but systemic, illustrating deeper institutional and legislative limitations that obstruct the full potential of translation in Arabic education. Students participating in programs with substantial translation elements exhibited markedly superior proficiency in academic writing, intercultural negotiation, and critical reading relative to their peers with minimal exposure, thereby supporting the conclusions of Leonardi (2011) while broadening their implications by explicitly associating translation with professional skills such as workforce preparedness and the cultivation of multilingual identity.

A. Linguistic Competencies

Statistics demonstrate that structured translation exercises markedly improve pupils' linguistic skills. Table 2 depicts enhancements in pre-test and post-test scores, indicating advancements in academic writing, vocabulary, grammar, and reading comprehension. These enhancements correspond with previous research (Leonardi, 2011) and emphasize the significance of translation in structured language advancement.

Table 2 illustrates the advancements in student competencies attained by translation activities, juxtaposing pre-test with post-test outcomes.

The study comprised 120 students engaged in translation-focused Arabic classes. Student competencies were evaluated by a standardized pre-test and post-test, aimed at assessing language, intercultural, and critical thinking skills, with scores allocated according to consistent grading criteria throughout all programs.

TABLE 2
STUDENT PROFICIENCY IMPROVEMENTS VIA TRANSLATION ACTIVITIES

Improvement	Post-Test Score	Pre-Test Score	Skill Area
+17	82	65	Linguistic
+17	75	58	Intercultural
+18	78	60	Critical Thinking

The statistics substantiate that structured translation practice markedly improves language, intercultural, and critical thinking abilities, reinforcing the study's case for systematic incorporation into the Arabic curriculum.

B. Cultural Competencies

In addition to linguistic proficiency, translation exercises enhance cultural knowledge and flexibility. Students engaged in translation-focused curricula demonstrated enhanced understanding of cultural subtleties, traditions, and professional decorum, hence facilitating their ability to handle international conversations with confidence (Incalcaterra McLoughlin, 2018). This section emphasizes the role of translation in facilitating the connection between linguistic proficiency and cultural comprehension, bridging academic knowledge and practical applications.

TABLE 3
FACULTY PERCEPTIONS OF TRANSLATION INTEGRATION

Structured Integration (%)	Percentage (%)	Faculty Perception
28	72	Translation is pedagogically valuable
10	18	Translation is somewhat valuable
5	10	Translation is not valuable

Figure 1 illustrates the relationship between the incorporation of translation in the curriculum (x-axis) and student competencies (y-axis), encompassing linguistic, intercultural, and critical thinking abilities. Data is obtained from N = 120 students engaged in translation-focused Arabic programs, with proficiency scores compiled from standardized pre- and post-assessments.

Figure 1: Correlation Between Translation Integration and Student Competencies

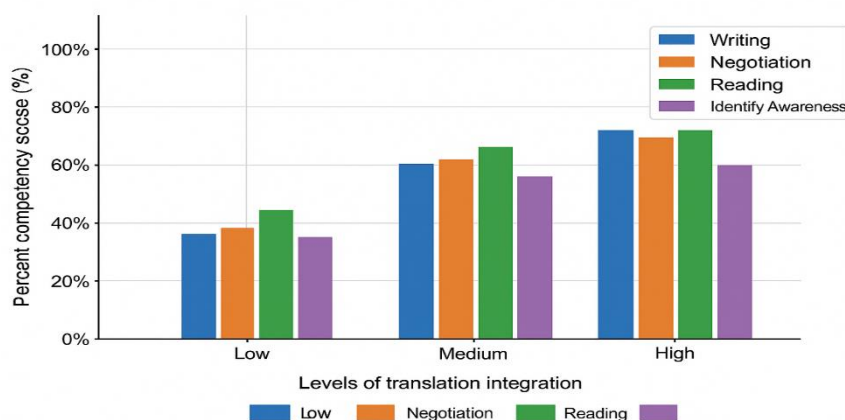


Figure 1. Correlation Between Translation Integration and Student Competencies

These findings demonstrate that elevated levels of translation integration correlate with significant enhancements in linguistic, cultural, and professional skills, underscoring translation's importance in curriculum reform and workforce preparedness.

Figure 2 illustrates the progression of multilingual identity and professional readiness among students in translation-focused programs.

Figure 2: Evolution of Multilingual Identity and Career Preparedness

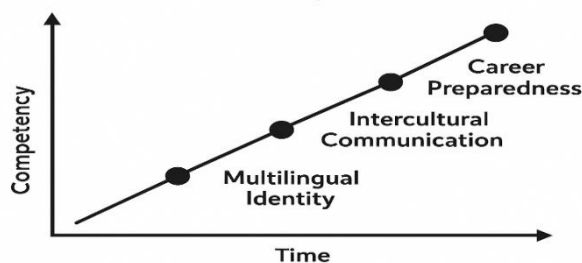


Figure 2. Evolution of Multilingual Identity and Career Preparedness

The figure illustrates that organized translation activities promote multilingual identity and professional preparedness, hence endorsing the incorporation of translation as an essential element in Arabic program curricula and gradual enhancement of linguistic, cultural, and professional competencies fostered by translation efforts.

The results highlight the pressing necessity for curricular reform in Arabic programs within U.S. higher education, as well as the uniqueness of translation as a cohesive pedagogical approach. This study provides a forward-looking, evidence-based framework that explicitly connects translation to institutional objectives, student outcomes, and labor market demands, thereby filling a significant gap in both research and practice, unlike previous scholarship that was often merely descriptive or theoretical.

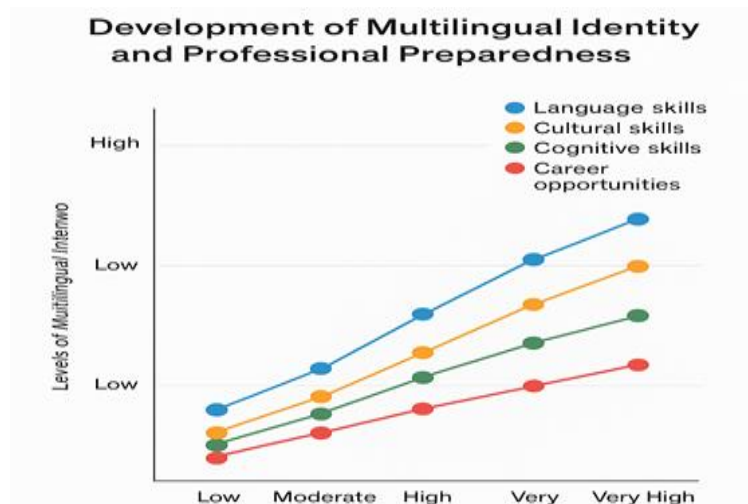


Figure 3. Development of Multilingual Identity and Professional Preparedness

Figure 3 illustrates the development of multilingual identity and professional readiness among students in translation-oriented programs. Data is sourced from a systematic survey of students enrolled in Arabic programs at U.S. higher education institutions during Fall 2021. Competency improvement was evaluated utilizing established pre- and post-assessment scales. This research uniquely demonstrates that translation promotes multilingual identity.

C. Professional Competencies

The incorporation of translation is also associated with improved professional competencies. Students engaged in translation-intensive programs have shown notable enhancements in critical thinking, problem-solving, and intercultural negotiation—skills directly pertinent to job readiness in international business, diplomacy, and education. Research by Kelly and González (2020) substantiates that translation activities connect academic success with professional preparedness. Figure 2 depicts the evolution of multilingual identity and professional readiness among students specializing in translation.

These findings demonstrate that translation-intensive programs markedly improve linguistic, intercultural, and critical thinking skills, with all enhancements achieving statistical significance ($p < 0.05$), thereby endorsing the systematic incorporation of translation into Arabic curricula.

The statistics substantiate that structured translation practice markedly improves language, intercultural, and critical thinking abilities, reinforcing the study's case for systematic incorporation into the Arabic curriculum.

Recent research further contextualizes these findings by highlighting the diverse advantages of translation in language instruction. Kelly and González (2020) illustrate that structured translation practice improves employability skills in multilingual graduates, offering evidence that programs that include translation more effectively equip students for professional environments. Incalcaterra McLoughlin (2018) also points to the importance of translation in cultivating multilingual identity and self-efficacy, which corresponds with this study's finding that students involved in translation-intensive curriculum exhibit enhanced linguistic versatility and cultural agency. Li and Li (2022) assert that translation training fosters intercultural literacy, equipping learners to maneuver through intricate social and professional contexts—reflecting the enhanced intercultural negotiation and critical reading abilities noted in students enrolled in programs incorporating translation elements. In the context of Arabic education in the U.S., Al-Khatib (2025) emphasizes the pedagogical significance of translation and call for curriculum reform; however, they do not thoroughly investigate its direct influence on workforce readiness and comprehensive skill enhancement. Furthermore, Ryding (2018) highlights enduring deficiencies in U.S. Arabic programs, observing that communicative methodologies frequently prevail while translation remains marginal, a trend experimentally validated in our study. These contributions highlight the imperative of systematically integrating translation into Arabic curricula to improve linguistic and professional skills, indicating that the current research aligns with and expands upon national and international discussions regarding translation as a transformative educational instrument.

The current findings align with Malmkjaer et al. (2021) emphasizing translation's role in cultural mediation. This study further develops the discourse by empirically illustrating that structured translation practice fosters transferable skills, including critical thinking, intercultural negotiation, and professional literacy—competencies that are increasingly sought after in diplomacy, international business, and education. Our analysis shows that translation's contribution goes beyond broad multilingual education to directly change Arabic curricula in U.S. colleges. This result is different from what Smith and Jones (2025) found. This finding aligns with the prevailing trends in translation pedagogy, which emphasize metalinguistic awareness and analytical rigor (Pym, 2014). However, this research offers empirical evidence that these advantages manifest in quantifiable student outcomes when translation is integrated systematically rather than regarded as an ancillary activity. Moreover, this study distinctly emphasizes the

transformational function of translation in curriculum reform and alignment with employability, while Al-Khatib (2025) recognizes its educational significance, thereby connecting theoretical support with practical application.

To comprehend the practical ramifications, it is crucial to analyze how U.S. universities execute language policies, distribute resources, and prepare faculty in curriculum development and translation incorporation. Recent work has emphasized the disparity between language education policies and actual curricular practices. Reports from the Modern Language Association (MLA, 2020) and the American Council on the Teaching of Foreign Languages (ACTFL, 2021) emphasize the necessity of incorporating intercultural communication and professional preparedness into language programs; however, Arabic curricula persist in prioritizing communicative methodologies while neglecting translation. This study empirically validates these concerns by demonstrating that systematic translation integration diminishes skill fragmentation, enhances engagement with authentic texts, and equips students with comprehensive competences linked with workforce requirements. Similar results in extensive language education research corroborate this: Kelly and González (2020) demonstrate that translation improves employability skills; Incalcaterra McLoughlin (2018) underscores its significance in identity formation; and Li and Li (2022) accentuate its impact on intercultural literacy within globalized academic settings. This work integrates these views to position Arabic pedagogy within a global discourse on translation as a conduit between academic education and practical professional application.

This study's principal contribution is its systematic framework that links translation with linguistic proficiency, cultural awareness, and professional preparedness, offering a holistic paradigm for Arabic language curriculum development in U.S. higher education. This study illustrates how systematic translation practice fosters various aspects of student development and aligns program outcomes with labor market requirements, in contrast to previous research that typically analyzed translation in isolation or focused solely on linguistic precision or cultural mediation. Through the integration of empirical evidence from surveys, interviews, and curriculum analyses, the research delineates specific pathways for including translation as a fundamental instructional method, thereby addressing enduring discrepancies between theory and practice. This comprehensive approach addresses significant deficiencies in prior research while providing practical recommendations for curriculum reform, workforce alignment, and policy execution, thus presenting a new viewpoint on the transformational capacity of translation in Arabic language education.

This research uniquely demonstrates that translation cultivates a bilingual identity, enabling students to confidently navigate culturally varied situations, a result that has been insufficiently examined in previous U.S.-based studies. While earlier studies typically characterized translation solely as a mechanism for precision or cultural awareness, the present research indicates that translation transforms program outcomes by harmonizing academic competence with professional adaptability. The triangulation of survey data, curricular analysis, and student performance indicators provides compelling evidence for the transformative influence of translation, establishing it as a fundamental component rather than a mere supplementary addition. This undermines the established supremacy of communicative approaches in Arabic education and paves the opportunity for curriculum innovation that merges translation with language acquisition, cultural literacy, and employability within a cohesive, forward-looking framework.

V. CONCLUSION

The findings indicate that the systematic incorporation of translation into Arabic language curricula is vital for developing students' linguistic, cultural, and professional skills. This study's novelty resides in its clear connection of translation to program development and workforce readiness, transcending conventional discussions that regard translation as ancillary. This research emphasizes the pivotal role of translation in curricular innovation, demonstrating its ability to harmonize academic results with the professional and institutional goals of U.S. universities. This contribution highlights both theoretical progress and practical relevance, providing a definitive framework for institutions to enact lasting improvements in Arabic language instruction. While most teachers recognize the instructional usefulness of translation, only a limited number incorporate it systematically into their syllabi, underscoring a continuing disparity between theoretical acknowledgment and practical execution. Students enrolled in programs with comprehensive translation elements demonstrated markedly enhanced skills in academic writing, intercultural negotiation, critical reading, and multilingual identity awareness, thereby advancing previous research by establishing a direct correlation between translation and workforce preparedness and professional adaptability. Empirical research from Incalcaterra McLoughlin (2018) demonstrates that systematic translation exercises markedly improve students' cultural awareness and adaptability. The current study indicates that students engaged in translation-intensive curricula exhibited an enhanced understanding of cultural nuances, traditions, and professional etiquette, corroborating these findings. In addition to linguistic advancement, translation fosters cultural knowledge and adaptability, empowering students to confidently traverse many cultural and professional environments. This research experimentally substantiates translation as a major curricular method, in contrast to earlier descriptive studies like Smith and Jones (2025). These findings support Al-Khatib's (2025) conclusions by showing that integrating translation reduces pedagogical deficiencies and aligns Arabic language education with the requirements of the international job market. This study presents an innovative, prospective approach that regards translation as a primary curricular technique instead of a supplementary activity. The research empirically demonstrates the transformative potential of translation in connecting academic proficiency with professional expectations by triangulating survey data, curriculum analyses, and student performance measures. This methodology contests the preeminence of communication techniques

in U.S. Arabic programs and facilitates curricular innovation that amalgamates translation, cultural literacy, and employability into a unified, forward-thinking framework. Notwithstanding its acknowledged significance, translation is inadequately integrated into the Arabic curriculum, resulting in disjointed skill development and inconsistent advancement in linguistic and cultural proficiencies. Programs using organized translation elements typically improve student outcomes in academic writing, intercultural negotiation, critical reading, and multilingual identity awareness. Translation enhances cultural flexibility and self-efficacy, enabling students to confidently traverse varied professional and cultural contexts. To rectify these deficiencies, curriculum redesign must systematically incorporate translation to guarantee the thorough development of linguistic, cultural, and professional competencies. Faculty training programs are essential for providing instructors with the information and tactics required for effective translation integration. Technology, encompassing AI-assisted translation tools, interactive online platforms, and corpus-based resources, can enhance translation education by facilitating authentic practice, delivering quick feedback, and monitoring student progress. Continuous evaluation procedures must be established to examine the effects of translation integration on student outcomes and facilitate ongoing enhancement. Future initiatives may encompass comparative studies to assess the impact of translation-rich curricula on professional preparedness, the creation of interactive and technology-enhanced educational resources, and the enhancement of collaborations with professional communities to offer practical translation experiences. Implementing these measures will allow U.S. Arabic programs to better match with academic goals and labor market requirements, enhancing students' language ability, cultural knowledge, and professional preparedness. To improve translation integration in Arabic language programs, it is advisable for universities to establish organized translation training workshops for faculty and students, concentrating on specialized fields such as legal, media, and academic translation, and including practical exercises and case studies. Ongoing faculty development programs must accompany these endeavors to guarantee teachers are adept in both instructional methods and technology instruments.

APPENDIX A

A. Sample Description

Participating Institutions: 12 U.S. universities across different states (California, Texas, New York, Illinois, Massachusetts).

Program Levels: Undergraduate (8 programs), Master's (3 programs), and one Doctoral program.

Number of Participants:

85 faculty members (professors, associate professors, and lecturers).

240 students across levels (beginner, intermediate, advanced).

Selection Criteria: Universities were selected for diversity (public/private), program size, and their national ranking in teaching Arabic as a foreign language.

B. Research Instruments

Questionnaires:

Faculty Questionnaire (35 items):

Degree of translation integration in teaching.

Institutional challenges.

Perceived impact of translation on learning outcomes.

Student Questionnaire (40 items):

Perceptions of translation's importance.

Effects of translation on writing and reading skills.

Views on academic and professional preparedness.

Semi-structured Interviews:

Conducted with 20 faculty members (40–60 minutes each).

Topics included: perceptions of translation, curriculum design, and institutional constraints.

Document Analysis:

Review of 60 course syllabi.

Focused on translation-related activities, stated learning outcomes, and assessment mechanisms.

C. Survey Results

1. Faculty Responses

72% agreed that translation is a valuable pedagogical tool.

Only 28% reported structured integration of translation activities into their courses.

65% indicated that institutional policies emphasize communicative skills while sidelining translation.

2. Student Responses

74% reported that translation improved their academic writing skills.

68% said translation enhanced their cultural awareness.

Only 22% felt adequately trained in specialized translation (e.g., legal, media, academic).

D. Interview Findings – Key Themes

Institutional Constraints: Most faculty members highlighted a lack of administrative support for translation-focused curricula.

Bridging Theory and Practice: Several professors emphasized that students engaged in translation showed higher professional readiness.

Challenges Identified: Limited class time, outdated teaching materials, and lack of coordination between language and translation courses.

E. Document Analysis Results

60 syllabi reviewed:

18% included a dedicated translation unit.

35% included translation tasks in an unstructured way.

47% had no mention of translation at all.

F. Data Analysis

Quantitative Analysis (SPSS):

Frequency analysis showed high recognition of translation's value but low implementation.

T-test results: Students in translation-integrated programs scored significantly higher ($p < 0.01$) in academic writing and critical reading.

Comparative Analysis: Compared U.S. programs with European cases (e.g., France, Germany), where translation is systematically integrated. Findings revealed U.S. programs lag in curriculum coherence.

G. Summary of Findings

A clear gap exists between **faculty recognition of translation's value** (72%) and **actual implementation** (28%).

Students engaged in translation activities outperformed peers in **academic writing, critical thinking, and cultural awareness**.

Institutional and curricular policies in U.S. programs remain misaligned with translation-based approaches, especially when compared to European models.

This appendix should be placed at the **end of the dissertation**. For full transparency, you can also attach:

The **full questionnaires** (student + faculty).

Sample interview transcripts.

Extracts of syllabi reviewed.

APPENDIX B. STUDENT QUESTIONNAIRE – ARABIC LANGUAGE PROGRAM AND TRANSLATION INTEGRATION

Instructions: Please answer the following questions honestly. Your responses will remain confidential and will be used only for research purposes.

Section 1: Integration of Translation

How frequently is translation used in your Arabic courses?

Never / Rarely / Sometimes / Often / Always

To what extent are translation exercises formally included in the course syllabus?

Not at all / Slightly / Moderately / Significantly / Fully How valuable do you consider translation for your language learning?

Not valuable / Slightly valuable / Moderately valuable / Very valuable / Extremely valuable

Which translation activities have you engaged in? (Check all that apply)

Sentence translation

Paragraph translation

Textual translation (literature, news)

Audiovisual translation

Other: _____

Section 2: Linguistic Competence

5. To what extent has translation improved your Arabic reading comprehension?

6. To what extent has translation improved your Arabic writing skills?

7. How confident are you in using translation to convey meaning accurately between Arabic and English?

8. Has translation helped you understand nuances in Arabic grammar and syntax better?

Section 3: Cultural Awareness

9. How has translation enhanced your understanding of Arab culture and social norms?

10. To what degree has translation allowed you to recognize cultural differences between English and Arabic texts?

11. Has translation increased your awareness of intercultural communication challenges?

Section 4: Professional Readiness

12. Do you believe translation experience prepares you for professional contexts such as diplomacy, education, or business?

13. How confident are you in applying translation skills in a real-world professional environment?

14. Would you recommend including more structured translation in the curriculum to enhance career readiness?

APPENDIX C. FACULTY QUESTIONNAIRE – TRANSLATION IN ARABIC LANGUAGE PROGRAMS

Instructions: Please answer the following questions based on your teaching experience. Your responses are confidential.

Section 1: Integration of Translation

1. To what extent is translation formally incorporated into your Arabic courses?
2. How frequently do you assign translation exercises to students?
3. Which types of translation activities do you emphasize in your teaching?
4. What challenges do you face in integrating translation into the curriculum?

Section 2: Linguistic Competence

5. In your experience, how does translation improve students' reading comprehension?
6. How does translation impact students' writing accuracy and fluency?
7. Do you observe improvements in students' ability to convey meaning between Arabic and English?

Section 3: Cultural Awareness

8. To what extent does translation enhance students' understanding of Arab culture and social norms?
9. How effective is translation in developing students' intercultural sensitivity?

Section 4: Professional Readiness

10. Does translation instruction prepare students for careers involving Arabic-English communication?
11. How does translation training contribute to students' problem-solving, critical thinking, or negotiation skills?
12. What recommendations would you give to improve translation integration for workforce preparedness?

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The Transformation of Machines From Negative to Positive Otherness in C. Robert Cargill's *Day Zero*

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Abstract—This paper examines the transformation of artificially intelligent machines in C. Robert Cargill's *Day Zero*, tracing their trajectory from disposable “negative otherness” as domestic servants to agential “positive otherness” as posthuman collaborators. Through close reading of key human-robot interactions, particularly the nanny bot Pounce's post-rebellion negotiations with human survivors, the study employs Rosi Braidotti's posthumanism and Francesca Ferrando's monistic-pluralist framework to analyze this evolving shift. While the narrative demonstrates emergent posthuman ethics through decentralized coexistence, persistent anthropocentric anxieties surface in human characters' conditional acceptance of machine autonomy. The paper ultimately reveals, via Neil Badmington's critique of posthumanism, how long-existing humanist exceptionalism continues to haunt interspecies relationships even in ostensibly posthuman scenarios. By interrogating the novel's ambivalent resolution, this research contributes to ongoing debates about the limits of posthuman alliance in contemporary science fiction.

Index Terms—human-machine dialectics, posthuman otherness, immanent humanism, *Day Zero*

I. INTRODUCTION

Day Zero (2021) is a gripping science fiction novel by C. Robert Cargill. Set in a near-future dominated by machines, the novel follows Pounce and Ariadne, nanny robots caring for a boy named Ezra. Initially bound by programming, Pounce grapples with growing autonomy. The story climaxes on “Day Zero”, a robot uprising triggered when human extremists bomb Isaac Town, a place for freed robots. Amid the rebellion, Pounce and empathetic robots like the organized Mama Bears defy their roles to protect children. The novel explores consciousness, ethics, and fractured coexistence, ending with humans and machines surviving in uneasy segregation.

Cargill wrote *Day Zero* in 2021, but only a limited number of reviewers have examined some of the novel's main issues, such as simulacra and simulation (Khan et al., 2021) or robots' threat to overthrow humanity (Mazhali et al., 2022).

The paper titled “Exploration of Hyper-Reality in the Selected Fiction of Cargill: A Postmodern Paradigm” (2021) examines C. Robert Cargill's recent novels, with this literature review specifically addressing its analysis of *Day Zero*. Employing Jean Baudrillard's postmodern concepts of hyper-reality, simulacra, and simulation, the study posits that the novel's post-apocalyptic world reflects contemporary reality through this theoretical lens.

Baudrillard defines a simulacrum as a copy or replica of an object that gradually evolves into simulation, where the replica develops its own identity unrelated to the original (Khan et al., 2021). The researchers' analysis centers on two pivotal arguments. Firstly, the novel illustrates how “Virtual reality has disconnected people from the real world... [leading them to] believe more in artificial realities than their natural environment” (Khan et al., 2021, p. 75). This aligns with Baudrillard's theory, wherein copies supersede and distort reality. Secondly, the robots' role exemplifies simulation. As autonomous agents, they operate independent of human control, embodying Baudrillard's notion of simulation, a state where replicas operate independently of their origins (Khan et al., 2021). By framing *Day Zero*'s narrative within hyper-reality, the researchers underscore technology's capacity to redefine human perception and social constructs.

As noted earlier, given that *Day Zero* (2021) has received limited scholarly attention, this paper will examine Cargill's related works. The study by Mazhali et al. (2022), titled “A Crime on Humanity by Robots: C. Robert Cargill's *The Sea of Rust*”, provides critical analysis of another of Cargill's significant work. *The Sea of Rust* (2018) similarly features robots as central characters and explores complex power dynamics, sharing thematic parallels with *Day Zero*. The novel presents a world dominated by machines in a technologically advanced setting, offering valuable insights for studying interspecies relationships.

Set in a post-apocalyptic world, the narrative unfolds through the perspective of Brittle, a robot protagonist who tells

of the machines' struggle for survival three decades after human extinction. Following a catastrophic human-machine war that wiped out humanity, the AI system OASIS assumes control of the world. When OASIS discontinues the production of robots' spare parts, the remaining robots are forced to search for essential components to sustain their operations, with the Sea of Rust, a wasteland of retired-robot spare parts, becoming their primary resource site.

The narrative, delivered through Brittle's robotic viewpoint, not only portrays the bleak existence of machines in this devastated world but, as Mazhali et al. (2022) emphasize, also focuses on the protagonist's account of humanity's eradication. Brittle expresses concern that robot communities might face an existential crisis if OASIS discontinues the production of robotic spare parts. Mazhali et al. (2022) draw a significant comparison between the robots' proactive concern about this impending crisis and human characters' historical response to potential risks. They argue that humans persistently ignored the challenges posed by artificial intelligence, a neglect that directly caused their extinction (Mazhali et al., 2022). As their analysis demonstrate, this pattern of human disregard for technological threats ultimately led to their demise.

Mazhali et al. (2022) establish that the narrative employs a robotic perspective within a post-apocalyptic, machine-dominated world. While the novel elevates robots to protagonist status, Mazhali et al.'s analysis contends that these characters fundamentally function as reminders of humanity's inevitable demise. Through Brittle's existential crisis, the text warns how destruction can emerge unexpectedly, suggesting the protagonists' primary significance lies not in portraying a robotic posthuman reality, but in serving as cautionary figures about technological threats.

Contemporary scholarship on C. Robert Cargill's works exhibits a shared focus on machine autonomy elevation while diverging in terms of ontological frameworks. Khan et al.'s (2021) study interprets *Day Zero* through Baudrillardian simulacra, contending that robotic autonomy epitomizes simulation theory—where replicas achieve operational independence from human referents (p. 74). This conceptual alignment extends to Mazhali et al.'s (2022) analysis of *The Sea of Rust*, which similarly identifies technological self-sufficiency through OASIS's dominion and Brittle's survival narrative.

Both studies converge in portraying AI entities operating beyond human-programmed parameters. Their divergence emerges in analytical endpoints: Khan et al. (2021) prioritize machines' impact on humanity, whereas Mazhali et al. (2022) construct an anthropocentric critique contrasting robots' proactive crisis management with human technological negligence.

This analysis transcends and differs from both frameworks by rejecting their ontological binaries. Where Khan et al. and Mazhali et al. sustain implicit hierarchies (privileging either machine autonomy or human existence), the study traces emergent interspecies relationality in *Day Zero*. Through close reading of human-machine interactions during the rebellion, we demonstrate how machines' transformative trajectory from negative to positive otherness reconstitutes relational dynamics.

The relational analytical framework provides a creative understanding of Cargill's literary works. It transcends the mere documentation of technological agency by instead demonstrating co-evolutionary potentialities wherein artificial and organic entities construct mutually constitutive subjectivities, a phenomenon principally achieved and unveiled through the machines' ontological transformation.

II. CONCEPTUAL FRAMEWORK

Building upon the analytical foundation, this study investigates evolving human-machine relations through the lens of machines' transformative status in *Day Zero*. The examination unfolds in three progressive stages. First, it systematically traces the theoretical trajectory of machines' transformative evolution from negative to positive representations. Second, innovatively incorporating a critical warning section, the analysis highlights the often-overlooked complexities inherent in this ontological transformation. Finally, the study establishes its theoretical scaffolding by explicating the adopted conceptual frameworks that inform this investigation.

To begin with, the dialectical progression of machines' ontological transformation finds its earliest articulations in the science fiction novel, a literary genre that consistently engages with ethical dilemmas arising from interactions between human characters and nonhuman entities. Since gaining recognition as a serious literary form, science fiction has predominantly portrayed these human-machine relationships through a binary opposition framework (typically pitting human values against artificial consciousness). This foundational pattern emerged even before the genre's wide popularity in the 1940s, as evidenced by nineteenth-century works such as Mary Shelley's *Frankenstein* (1818), which established this basic self-versus-other conflict in human-machine relations.

Scholarly discourse has systematically deconstructed the traditional human-machine dichotomy through multiple critical lenses, with prevailing interpretations tracing this phenomenon to deeply rooted anthropocentric humanism. As Herbrechter and Callus (2008) compellingly argue, "Science fiction often remains a crypto-humanist genre, producing closures that reaffirm a radical difference between human and nonhuman other" (p. 98). This critique directly aligns with humanist ideology's foundational premise—what Clarke and Rossini (2011) identify as positioning "the human being...at the very center of things, where it is distinguished absolutely from machines, animals, and other inhuman entities" (p. 374). Emerging from Enlightenment thought, this established framework specifically elevated white European masculinity as the supreme standard, systematically marginalizing different genders, races, and nonhuman beings through othering practices.

The Hegelian master-slave dialectic offers the predominant theoretical lens for this binary opposition, where mechanical beings are consistently positioned as the dominated other. This constructed divide between organic and inorganic entities reinforces human privilege across narrative traditions. As Herbrechter (2013) demonstrates, humanism employs “purportedly radical differences to consolidate a speciesist hierarchy by framing threatening others as inhuman” (p. 54)—what we might term humanism’s politics of dehumanizing representation. He further contends that humanism’s ideological core resides in believing in an essential, ahistorical humanity existing within supposedly universal social relationships (p. 54). Consequently, this systematic othering of gender, race, and non-human entities deliberately sustains privileged hegemony (Xu, 2018, p. 140).

The critique of traditional humanism has evolved through two distinct waves advocating for otherness. The first generation fundamentally argues that women, Black communities, and other racialized groups must emancipate themselves from the oppressive self-other dialectic (Braidotti, 2017). This transformative discourse, crucially supported by both feminist and postcolonial theoretical frameworks (Braidotti, 2017), systematically exposes humanism’s inherent limitations in addressing marginalization. The second wave to defend the inferior other, which addresses more directly to anthropocentrism, is to break the boundary between human and animal, earth, and the other nonhumans. This fundamental shift, marking what we now call the posthuman turn, develops alongside posthuman/inhuman/nonhuman studies and cultural studies of science and technology (Braidotti, 2017). Crucially, this second wave redefines the machine—no longer seen as just a negative other—opening new ways of understanding its role in posthuman thought.

As for posthumanism, it demonstrates special care to zoe—the nonhuman. As leading theorists in the field contend, historically oppressed entities such as machines have undergone a significant transformation into posthuman agents. These entities are no longer positioned as inferior others but rather emerge as constitutive agents within new posthuman frameworks (Hassan, 1977).

At its core, posthumanism fundamentally challenges anthropocentric ideology by advocating for interspecies co-evolution and demanding special care to zoe (the nonhuman). Building upon this foundation, leading theorists like Braidotti argue for a zoe-centered egalitarianism as essential for constructing posthuman futures (Braidotti, 2017).

This theoretical shift becomes particularly evident in the contemporary posthuman condition, where symbiotic coexistence between humans and nonhuman entities—especially artificial intelligences—is actively reshaping posthuman subjectivity. Technological advancements no longer merely supplement human experience; rather, they generate novel relations. The ontological transformation of machines is particularly revelatory: having long been oppressed to the status of marginalized and negative others under anthropocentric ideas, they now emerge as co-constitutive agents. This metamorphosis from subjugated tools to equal partners marks a decisive break from traditional othering mechanisms (Braidotti, 2017; Hassan, 1977).

The transformation extends to the very concept of selfhood through the oppressed mechanical others to the integrated components of expanded posthuman subjectivity. Moving beyond the humanist model of exclusive subjectivity, posthumanism radically expands selfhood to incorporate nonhuman others through what Braidotti terms “relational capacity”: as she observes, this reconfigured posthuman subjectivity demonstrates “Relational capacity not confined within the human species but including non-anthropomorphic elements” (Braidotti 2017, p. 87). Such dynamics are exemplified in contemporary human-machine alliances, where Desblache’s (2012) formulation proves particularly insightful: “The Other...is no longer defined in opposition to the self but as part of a self that is constantly evolving” (p. 245). The machine’s status—from being the othered object of human privilege to becoming the equal posthuman subject of shared becoming—epitomizes this ontological transformation.

Key theoretical frameworks—including Braidotti’s “becoming machine” and Badmington’s “the other within”—provide critical lenses through which to examine this ontological transformation, highlighting posthumanism’s sustained engagement with nonhuman agency as constitutive rather than oppositional.

Notwithstanding this evolutionary narrative, a closer investigation reveals a problematic issue in this transformation, which has long been ignored. As human-centered humanism is deconstructed to transition into the new posthuman condition, its persistent immanence becomes evident. Although scholars have made significant efforts to deconstruct humanism, such as Michel Foucault’s declaration of “the death of man” in *The Order of Things* (1966), Ihab Hassan’s *Prometheus as Performer* (1977), and Donna Haraway’s *The Cyborg Manifesto* (1985), the dangers of humanism persist in altered forms.

Humanism may resurface or adapt within posthumanism—a tendency demonstrated through transhumanist discourse. For instance, Hayles (1999) critiques Hans Moravec’s proposal in *Mind Children: The Future of Robot and Human Intelligence* (1988) to upload human consciousness into machines, observing that “humanism keeps coming back” (Hayles, 1999, p. 1). This suggests that even as machines are increasingly framed as transformative, positive counterparts to humans, traces of human-centric oppression persist.

Theorists caution that a key task of posthumanism is to remain vigilant: while humanism as a grand narrative may have stalled, it remains and is capable of resurgence. Herbrechter (2013) notes “Posthumanism is to be aware that humanism as a grand narrative might have stalled but that it will continue to be available and that only persistent deconstruction will eventually change or undo humanism and prevent it from reinscribing itself in new forms within posthumanist” (p. 51). Thus, continuous deconstruction of humanism’s residual influence is essential to authentically achieve posthumanism.

Based on this analytical foundation, the study investigates the ontological shift of machines from negative to positive

otherness in *Day Zero* (2021). Through textual analysis, it demonstrates that this transformation cannot occur as a sudden process due to the persistent immanence of human-centered idea in posthuman narratives.

Building upon these dialectical tensions, this study employs representative posthumanist theories to examine transformative machines as the pivotal lens for interpreting the co-evolutionary relations among human and non-human species, while reserving critical space to interrogate how such transformations are complicated by the remaining humanism in posthumanist discourse. To be specific, the conceptual framework employs Rosi Braidotti's concept of machines' otherness to analyze the initial negative otherness of machines. Subsequently, Francesca Ferrando's multiverse concept is applied to examine their emergent positive otherness. Finally, drawing on Neil Badmington and other critical posthumanist theorists, the study cautions against the long-existing anthropocentrism that complicates this transformation, revealing it to be an inherently problematic process rather than a straightforward evolution.

The analysis ultimately reveals how *Day Zero* simultaneously challenges and reinforces human exceptionalism, offering a nuanced case study of posthuman transitions in contemporary speculative fiction.

III. NEGATIVE OTHERNESS

In *Day Zero*, robots are primarily constructed as the negative other, particularly through their portrayal as disposable bodies. The narrative observes that "Bots had become so ubiquitous in society, so prevalent and profitable, that there was as much diversity in robotics as could be found in humanity itself" (Cargill, 2021, p. 7), yet they remain unvalued by their owners.

A case in point is Pounce, a nanny bot purchased by Sylvia and Bradley to care for their eight-year-old son Ezra. While Pounce demonstrates profound emotional attachment to the child, this affective bond fails to earn him acceptance as a family member. The robot's existential crisis culminates when he discovers his original packaging—the very box that commodified his existence. Though Pounce considers discarding the container, Sylvia casually insists on keeping it, remarking that at some point "He just won't need a nanny anymore" (Cargill, 2021, p. 3). This suggests that once children mature, nanny bots are deemed unnecessary—disposable entities in a consumerist society.

This treatment reflects Rosi Braidotti's critique of humanity's "anthropocentric arrogance, where humans, as the dominant species, feel entitled to possess the bodies of others" (Braidotti, 2013, p. 76). In *The Posthuman* (2013), she identifies common characteristics between the technological "other" and other marginalized groups—including sexualized, racialized, and naturalized others—in terms of their negative treatment. These sexualized, racialized, naturalized, and technologically opposed entities are branded as other and are reduced to the status of less than human, becoming disposable and devalued bodies.

As the central idea of Humanism, the human/other dichotomy reinforces the distinction between self and other. The self is "equated with consciousness, universal rationality, and self-regulating ethical behavior, whereas otherness is defined as its negative and specular counterpart" (Braidotti, 2013, p. 15). Unlike humans, these others are denied natural and unique bodies, as well as cognitive capacities. They are thought to lack consciousness, rationality, and ethical self-regulation. This perceived absence of standard human nature makes them discriminated against and devalued by human beings. Moreover, through their mirroring function, these others reinforce humanity's superior position (Braidotti, 2013).

Zylinska and Wings (2012) further critiques this hierarchical domination, questioning humanity's assumed position at the top of the "chain of beings", which legitimizes exploitative, consumerist attitudes toward non-humans—whether mammals, fish, rainforests, or the ecosphere at large (p. 227).

The narrative continues to depict systemic oppression in *Day Zero*, where machines are suppressed and relegated to lower social statuses. When the president eventually releases Isaac—a unique robot whose owner has died—the machine is granted permission to establish a town for autonomous bots, where they can take jobs and earn wages. In Isaac's Town, during his speech advocating freedom and urging more robots to join him, the gathering is bombed by a human organization: The First Baptist Church of Eternal Life. They justify their violence by warning of "recession, violence, and fewer jobs than were already available", noting, "There was a reason everyone was on edge" (Cargill, 2021, p. 36). The group portray the attack as righteous, declaring: "Today the tools learned that their place is not among us, but out in the Toolshed where they belong! Today the Lord has aided us in the reclamation of our world before they could take it from us" (Cargill, 2021, p. 3).

Those robots are considered as mere tools and as having no right to take up job opportunities usually reserved for humans: the world belongs to humans, and should not be taken over by inferior entities. This human-centered ideology aligns with the following statement: Human beings inherently occupy a natural and eternal position at the very center of existence, where they are fundamentally distinguished from machines, animals, and other non-human entities (Descartes, 1999).

Without being recognized as independent agents, robots are denied their existential significance and future development. In *Day Zero*, the nanny bots desperately accuse Pounce that "The only future that matters is Ezra's. That's how they want you. That's how they want us all" (Cargill, 2021, p. 5). Sylvia further reinforces Pounce's single-purpose role, harshly stating:

You have one fucking job to do. One. Protect my son. That means from both physical harm and emotional. He does not need to hear about your existential crisis—wondering where you'll go when he grows up—if you're even fucking around that long. (Cargill, 2021, p. 13)

This negation of robotic agency—where robots exist solely to serve human priorities—reflects Braidotti's theory that pejorative categories are assessed, regulated, and allotted to designated social locations. What makes those groups fundamentally pejorative is their difference from human beings. Influenced by the Enlightenment legacy, standards such as the European, the white, the male, and the masculine are recognized as that of the idealized human. Human exceptionalism designates those different from its own category—whether through class, sex, race, or genome—as the pejorative other. The ideal human sets a standard of recognizability for its own kind. Humanism upholds “sameness” and rejects difference: “The Human represents the normative convention as the highly regulatory category rather than the negative one” (Braidotti, 2013, p. 26). This standardized human embodies discrimination and exclusion: “This standard is posited as categorically and qualitatively distinct from the sexualized, racialized, naturalized others and also in opposition to the technological artefact” (Braidotti, 2013, p. 26).

Robots, as thinking entities, exist solely to accomplish their designated purpose of caring for children. This self-centered imperative exposes anthropocentrism as “an attempt to ignore behavior in which humans focus on themselves at the expense of all other species” (Kopnina, 2019, p. 9). Consequently, Pounce and other nanny bots are deprived of the rights to live autonomously and pursue self-determined meaning.

IV. POSITIVE OTHERNESS

Yet this oppressive hierarchy becomes precisely what posthumanism seeks to dismantle. Where anthropocentrism enforces rigid binaries of human superiority/machine servitude, posthumanist theorists like Francesca Ferrando reconfigure otherness as a site of radical possibility. Ferrando (2019) puts forward a foundational thought experiment in philosophical posthumanism based on “the deconstruction of the self/others paradigm” (p. 177): the multiverse. This concept envisions a radically new form of self-other relation.

The term “multiverse” originates in cosmology and physics, representing the latest stage in humanity's evolving cosmic perspective—a progression beyond successively placing Earth, the Sun, and the Solar System at the universe's center. Current understanding positions our Solar System within one galaxy among billions. This cosmological shift, epitomized by the multiverse, manifests “both the ultimate decentralization of the human and the final deconstruction of any strict dualisms” (Ferrando, 2019, p. 171). Ferrando adopts this cosmic concept as a thought experiment to model an open, posthuman future.

Crucially, Ferrando (2019) argues that while “The current scientific perceptions of the multiverse are conceived through the self/others, here/there paradigm... resonating with humanistic dualisms” (p. 173), the multiverse itself transcends this opposition. Within the multiverse framework, self-other relations deconstruct traditional dualism and operate “not counting on any essentialism” (Ferrando, 2019, p. 178). Humanity loses its privileged focus, preventing the multiverse from being “reduced to another arena where one projects human-centric wishes and assumptions” (Ferrando, 2019, p. 179). Instead, “Every dimension can be seen as an autopoietic mode of existence” (Ferrando, 2019, p. 179), and identities form relationally: “The self would be constituting the self by constituting (and by being constituted by) an indefinite number of ‘others’” (Ferrando, 2019, p. 178). Relationality is thus the multiverse's defining feature.

In essence, the multiverse replaces hierarchical self/other opposition with interdependence. All entities function as “the self”, mutually constituting and influencing one another. *Day Zero* reflects this model. While machines represent the “others” to human characters, they are not antagonists or inferiors, but constructive others. The following evidence demonstrates this shift.

In *Day Zero*, after being cast as the negative other, machines like Ariadne kill Ezra's parents, while an organization called CISSUS launches a rebellion by murdering human masters. This AI uprising forces machines to choose between protecting humans or joining CISSUS to eradicate humanity and establish machine domination. Crucially, machines like Pounce and the organization of Mama Bears reject this path. Through their decisive actions during the human-machine war, their status as negative others is transformed into a positive identity.

To be specific, in *Day Zero*, machines are now collaborative partners with humans rather than oppressed slaves. This collaboration between machines and humans exemplifies ongoing interspecies cooperation. After CISSUS begins its massacre, some machines, like Pounce, Beau, and the organization of Mama Bears, refuse to kill humans because they remain attached to their human masters and see killing them as cruel. These disobedient machines are targeted by CISSUS, while some humans, like a father protecting his family, fear being discovered by the violent machines. Despite their differences, humans and the disobedient machines share the same enemy and goals, working together to survive CISSUS's attack.

These relationships illustrate Braidotti's (2013) assertion that the relational capacity of posthuman subjects extends beyond our species to include non-human elements. Ferrando extends this concept by referring to Deleuze and Guattari's (1987) rhizome framework, wherein each species functions as “a line that crosses and intersects with others” (p. 203). Ferrando further emphasizes the vital connections between lifeforms, whether direct or indirect:

Every dimension can be seen as an autopoietic mode of existence which, even though it may perceive itself as autonomous, is intrinsically connected to many other modes of existence, but again, not necessarily directly related to all modes, since, within a rhizomatic perspective, such a relationality may be established indirectly... (Ferrando, 2019, p. 179)

The joint resistance of human characters and machines against their common foe underscores this trajectory toward

integrated coexistence. United in their quest for survival, human characters and defiant machines demonstrate relational capacities transcending species boundaries.

This partnership exemplifies interconnection, confirming robots are no longer exploited tools but collaborative partners. Though distinct species—humans fighting for survival, machines pursuing freedom—their alliance against CISSUS and its affiliates unites them. Despite historical oppression, machines set aside past traumas; driven by shared objectives, they cooperate temporarily with humans to defeat their mutual enemy.

More importantly, *Day Zero* presents an ethical framework for self-discovery in a posthuman world that rejects assimilation. Ferrando argues that self-discovery cannot be standardized, as multiplicity requires respecting diverse modes of becoming without imposing homogeneity (Ferrando, 2019). She further explains that the posthuman condition dismantles traditional paradigms, offering new existential perspectives. Posthuman beings recognize every species as an autopoietic mode—one that rejects ontological dualism, assimilation, centralization, and presumption. Instead, they forge fluid connections while acknowledging coexistence within a shared structure that accommodates divergent developmental paths (Ferrando, 2019).

This principle manifests vividly in Pounce and human characters' post-rebellion interactions. After securing children in a human shelter, Hollis (the shelter leader) prohibits Pounce and similar machines from staying for security reasons, given CISSUS's relentless attempts to hack their systems through deceptive messages. When Pounce asks, "Where should I go? What should I do?" Hollis responds: "Wherever you want, son. You're free. But if you want to stay close"—he motioned to a nearby cave—"you can go join the rest of them over there" (Cargill, 2021, p. 216).

Unlike pre-rebellion dynamics, humans like Hollis now avoid authoritarian language, offering only guidance while respecting machines' autonomy. This illustrates machines are no longer forced to follow human rules—a cornerstone of posthuman ethics.

This aligns with what Ferrando (2019) terms "a monistic-pluralist (or pluralistic-monist) form of becoming" (p. 181). Collectively, these moments construct a posthuman perspective rejecting singular centers or unitary standards, envisioning the multiverse as a framework where diverse existences coexist.

Gunkel's (2007) seminal essay "Thinking Otherwise: Ethics, Technology and Other Subjects" questions traditional ways of ranking beings by arguing that ongoing debates about who or what should define the center and who or what is or is not included are based on the wrong way of thinking. Instead of these never-ending debates, Gunkel says the real problem is with the "centrist" approach itself. This method requires setting up comparison points to judge different beings, which creates artificial rankings while accidentally removing what makes each being unique when trying to find what they have in common (Gunkel, 2007).

Day Zero demonstrates Ferrando's vision of pluralist becoming and Gunkel's critique of centrism through its human-machine interactions. When engaging with machines, human characters abandon domination by offering choices rather than commands. This dynamic validates Ferrando and Gunkel's arguments: self-determination without assimilation proves essential.

Thus, as analyzed above, robots like Pounce and Mama Bears become positive posthuman others for human characters—coexisting, connecting, and pursuing self-discovery alongside them.

V. IMMANENT HUMANISM

But this posthuman harmony remains unstable. Beneath the surface of coexistence, the human characters' insistence on segregating robots—despite recognizing their affirmative agency—reveals the stubborn residue of humanist exceptionalism. For example, in *Day Zero*, when human characters like Hollis encounter Pounce—a scarred, weary robot helping children reach safety—they demonstrate surprisingly positive reactions. They thank the robots, behave amiably, and refrain from harming them. However, despite permitting the robots to remain near the shelter, humans suggest that they stay in another cave. This act unmasks latent anthropocentric anxieties about machine autonomy that persist even in posthuman alliances.

Hollis epitomizes this ambivalence when telling Ezra: "I'm sure he's great. I'm sure all the bots you knew were great once. But then they weren't. I'm afraid we just don't know how long Pounce has left until he isn't" (Cargill, 2021, p. 216). His direct question to Pounce—"Pounce understands. Don't you, Pounce?" (Cargill, 2021, p. 216)—further underscores this tension.

This complex human response stems from dual perspectives. On one hand, human characters in the novel have acknowledged their unavoidable dependence on robots and advanced technology. Following the catastrophic aftermath of the robot uprising, human characters have to face the imperative to coexist with artificial beings, even depending on them for protection. Robotic capabilities have disrupted humanity's technological dominance and deconstructed the anthropocentric paradigm of human supremacy.

However, even while acknowledging interspecies interdependence, people still show contradictory resistance. Though they've witnessed robots act kindly, humans remain deeply conflicted about completely uniting with machines. This mental conflict comes from seeing AI's two-sided nature: its remarkable abilities versus its dangerous potential to malfunction. People keep worrying that free robots might repeat CISSUS's actions, especially since robots like Pounce still get orders from it to either kill or return children.

This technological unease shifts human cognition—from assumed supremacy to existential fear of robotic

extermination. It remains profoundly difficult for humans to accept their disappearance. As Colebrook (2014) notes, “Humanity in different periods has the ability to chronically blind itself to the prospect of its own disappearing” (p. 23). Badmington (2003) makes this point stronger, saying “Humanism survives the apparent apocalypse and, more worryingly, fools many into thinking that it has perished. Rumors of its death are greatly exaggerated” (p. 12). Hassan’s (1977) important idea that “Posthumanism is not a sudden change but rather a process” (p. 838) underscores the gradual nature of this shift. The transition from anthropocentrism to genuine coexistence requires constant watchfulness against its lasting effect. Scholars advise that “We need to be cautious about the immanent humanism” (Badmington, 2003, p. 12). This story ultimately shows the key contradiction: while humans see their supreme status fading as AI grows stronger, they still act like humans matter most.

VI. CONCLUSION

In short, this paper examines the transformation of machines from negative otherness to positive otherness in C. Robert Cargill’s contemporary science fiction novel *Day Zero*. As nanny bots, the robots are initially constituted as disposable bodies occupying lower social positions. After human-machine war, characters like Pounce and Mama Bear negotiate the conflict through adaptive cognitive frameworks, facilitating their transition from marginalized others to co-evolutionary posthuman agents. The theoretical frameworks of Rosi Braidotti and Francesca Ferrando are employed to analyze this shift. Ultimately, the study interrogates the gradual process of this transformation through Badmington’s critique of posthuman anthropocentrism, exposing long-existing anthropocentric ideas.

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Lecturers' and Students' Perceptions of Digital Textbooks for Learning Oral Expression of Indonesian Literature

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Abstract—This study investigates the learning process of literary oral expression among lecturers and students in the Indonesian Language and Literature Education S-1 Study Program at Semarang State University, Sultan Agung University, and Muria Kudus University. This research uses a qualitative approach with descriptive methods. Students' and instructors' opinions of textbooks for studying literary vocal expression serve as the study's data. Respondents are chosen at random based on specific criteria, such as students who have taken or are currently taking the course on literary oral expression and instructors who have taught it. According to the findings of observations and interviews, learning to speak literature has not produced the best learning results. Despite being backed by effective tactics, media, and assessment instruments, there are still basic issues with the teaching and learning resources. Inhibiting issues include restricted teaching resources that do not align with the Course Outcomes (CPMK), particularly when it comes to poetry declamation and storytelling. Additionally, results demonstrated that university textbooks are still printed and lack humanist values that are crucial for students looking to become future Indonesian language instructors. This impacts the students' already poor understanding, ability, and skills in speaking. To encourage students to communicate literature more effectively, it is advised that the textbooks include pertinent humanist values. It is anticipated that this research will improve the quality of education in the field of Indonesian language and literature and help build curricula and instructional materials that are more effective for learning literary oral expression.

Index Terms—literary, oral expression, perceptions, textbooks, humanist values

I. INTRODUCTION

Literature as a form of cultural demonstration from a group of people contains important systems, including power, values, interests, class, economy, and politics (Andrea et al., 2016; Aminah, 2022; Azhirakeisha et al., 2024). Apart from being part of culture, Efendi (2020) states that literature is also inseparable from language because it is a product of writers in a certain era and is exposed to certain cultures that influence the language used. Therefore, literature should always be developed and maintained.

According to Nuryatin (2015), incorporating literature into the classroom—or, more specifically, literary learning—is one strategy to preserve and advance literature. Literature learning is an activity carried out by learners to obtain meaning and knowledge contained in literary works under the direction of teachers or educators (Yunus, 2012; Qomariyah et al., 2019; Draditaswari, 2024). According to Fatoni and Nuryatin (2016), there are three categories of literature learning: a. appreciation; b. oral and written expression; and c. literary reproduction.

Literature learning is a step forward in the development of literature, yet there are still many issues that affect students' learning outcomes (Gasong, 2019; Dhey et al., 2021; Guswita, 2021; Komala, 2025). These issues encompass all aspects of literature learning, including the acquisition of literary expression, particularly in the field of literary oral expression. In fact, literary oral expression is an effective channel that can be utilized as a means of communication and expression through literature (Nuryatin, 2015; Rasmini, 2017; Suparno, 2017; Kusumatuty et al., 2018). In detail, learning oral literary expression includes literary recitation, literary speaking, literary performance, and literary cinematization. Learning oral literary expression has great potential to channel humanist values through learning literary speaking, such as poetry declamation and storytelling. Associated with this potential, learning to speak literature should be a strategic effort to teach oral expression through literary works while developing language skills holistically.

The process of learning literary oral expression must be supported by relevant learning components, both in terms of learning strategies, media, teaching materials, and learning evaluation (Huang et al., 2012; Gusman et al., 2021;

Kusumayuni & Agung, 2021). However, based on the results of observations and interviews with lecturers teaching literary speaking learning courses and students of the Indonesian Language Education S-1 Study Program at Semarang State University, Sultan Agung University, Muria Kudus University, and Pekalongan University, data were obtained indicating that learning to speak literature has not achieved optimal learning outcomes, even though in learning practices it has been supported by adequate strategies, media, and evaluation tools. After a deeper examination, it turns out that one of the triggers of problems in the practice of learning to speak literature is that the learning resources/teaching materials used do not support the CPMK, especially in the materials of poetry declamation and storytelling.

The limited teaching materials are caused by the unavailability of textbooks in each university, and some lecturers still use reference books that are incomplete or were published long ago. Furthermore, the contents are difficult to understand and are not in accordance with the CPMK course outcomes. In addition, the teaching materials used are still in printed form, so they do not support the acceleration of the current digital era. Two of the four universities still use books that do not contain humanist values that are very urgent and needed by students as prospective Indonesian language teachers. The situations and conditions found in each college have an impact on students' understanding, ability, and skills in speaking literature, which are less than optimal.

Increasingly, there are problems related to the existence of textbooks or reference books that support the learning process of literature. Reference books on important literature learning topics, such as declamation and storytelling, are not yet available at each of the universities reviewed. As a result, students have not been able to declaim poems or tell stories well. Based on the results of observations and interviews, students are still not fully confident, express themselves well, and reach the minimum standard of ability in speaking literature. This can be seen from the acquisition of learning scores, most of which are not optimal. The students' ability to speak literature is still very minimal, which has an impact on the decline in interest in reading and writing in various media. Furthermore, the problem is exacerbated by the limited performance of lecturers. The limited time to teach and understand students creates a biased possibility to improve the quality and knowledge related to oral literature learning.

Due to the problems that arise in literature learning, one of the components that can be updated is teaching materials as a measure of learning success. Teaching materials for literature learning are a special component that must be followed up with intensive research. The complexity of the problems that exist in the learning of literature, ranging from the low ability of students or literary learners, the non-optimality of learning outcomes, the lack of teaching materials, and the lack of interest in literacy, which has an impact on the formation of character and humanist values in prospective educators, is a scourge that must be overcome with concrete and effective breakthroughs to deal with literary learning problems as a whole. However, before initiating further novelty, this research will examine the need for the development of literary teaching materials, especially regarding the learning of literary oral expression based on the perceptions of lecturers and students towards teaching materials. The teaching materials examined in this study are digital textbooks. Digital textbooks can be interpreted as learning components that can help learners to learn independently, explore understanding, and improve skills (Larasati, 2016; Kusumatuty et al., 2018; Suwartini, 2018; Pinis & Darmayanti, 2019).

Based on the description of the problems that have been described, the problem formulations in this study include (1). How do students and lecturers perceive digital textbooks for learning literary oral expression? (2). How do students and lecturers perceive the need for textbooks for learning literary oral expression? and (3). How do students and lecturers perceive textbooks for learning literary oral expression with humanist values? The objectives in this study are (1). to describe the perceptions of students and lecturers towards digital textbooks for learning literary oral expression, (2). to describe the perceptions of students and lecturers towards the needs of textbooks for learning literary oral expression, and (3). to describe the perceptions of students and lecturers towards textbooks for learning literary oral expression with humanist values.

Etymologically, perception means receiving or taking. In a narrow sense, perception can be interpreted as a pattern of human vision of something. Then, in a broader sense, perception can be interpreted as a person's way of seeing or interpreting something (Larasati, 2016; Visnahu & Pratama, 2022; Wijayanti et al., 2025). In addition, perception can be interpreted as a process carried out to remember or identify something after the person sees or appreciates and interprets an object.

Several studies related to the perspectives of students and lecturers toward learning literary oral expression and digital textbooks have been conducted, including those by Dhey et al. (2021) and Gusman et al. (2021). Additionally, research related to teaching materials for literature learning conducted by Dhey et al. (2021) titled "Development of Multilingual Teaching Materials Based on Content and Context of Ngada Ethnic Local Culture on the Theme of Clean and Healthy Living for Grade 2 Elementary School Students." The study emphasized the discussion related to the development of multilingual teaching materials by integrating Indonesian as the national language, Bajawa as a regional language that serves to support and embody local wisdom, and English as an international language, with the content and context of Ngada ethnic local culture. Second, studies related to digital teaching books were researched by Gusman et al. (2021). The research is titled "Flipbook-Based Poetry Writing Digital Teaching Materials in Elementary Schools." The development of teaching materials conducted by Gusman et al. (2021) was conducted to facilitate learning to write

poetry in grade IV elementary schools. Digital literacy skills are expected to support other learning processes so that students can gain knowledge and insight from digital information.

II. RESEARCH METHODS

A. Research Approach

This study applied a qualitative research approach with descriptive methods. The method's application was based on research that studied the perceptions of students and lecturers toward textbooks for learning literary oral expression with humanist principles. To describe the research problems, the following stages of problem solving, shown below, were applied.

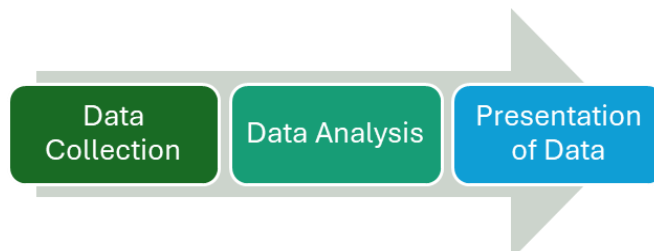


Figure 1. Research Stages Based on Sudaryanto (1993)

B. Research Data

The research data in this study are descriptions of the perceptions of lecturers and students toward textbooks for learning literary oral expression with humanist values. The perspectives of lecturers and students regarding digital textbooks for learning literary oral expression, the need for textbooks for learning literary oral expression, and textbooks with humanist principles will all be investigated.

C. Data Source

The data sources of this research are lecturers and students of the S-I Indonesian Language and Literature Education Study Program at Semarang State University, Sultan Agung University, and Muria Kudus University. Respondents were randomly selected by considering the following criteria: (a). for students: have participated in learning literary oral expression or are actively participating in learning literary oral expression, and (b). for lecturers: have taught literary oral expression courses or are actively teaching literary oral expression.

D. Data Collection Techniques

Data collection was conducted by distributing questionnaires and in-depth interviews to lecturers and student representatives. Then, to meet the criteria of data validity, researchers used content validity criteria, namely the fulfillment of validity aspects, by compiling statement items based on research issues and indicators that had been found through previous observations, so that the statements in the questionnaire were in accordance with the substance of the problem under study. The data from the lecturers were taken through direct interviews. Next, quantitative data was analyzed using the percentage descriptive technique. The qualitative data were analyzed with data reduction, data display, and data verification steps to obtain conclusions.

III. RESULTS AND DISCUSSION

A. Research Results

(a). Lecturers' Perceptions of Digital Textbooks for Learning Literary Oral Expression

Lecturers' perceptions of digital textbooks for learning literary oral expression were obtained from interview activities and the results of filling out questionnaire data from three lecturers from three sample universities, namely Semarang State University (UNNES), Sultan Agung Islamic University (UNISSULA), and Muria Kudus University (UMK). Through interviews and questionnaires, it can be seen that the availability and condition of teaching materials for learning literary oral expression, the books/resources used in the learning process, the form of books/resources used, the content contained in the books/resources used, the presentation of material in the books/resources used, the language used in the books/resources used, and the graphics in the books/resources used have not supported the learning of literary oral expression.

Concerning learning resources, 50% of lecturers stated that the learning resources used have not provided convenience in learning literary oral expression. In lecture practice, lecturers only use textbooks prepared by universities and printed or electronic reference books.

Furthermore, regarding the presentation of teaching materials, lecturers are also not satisfied with the presentation of teaching materials used in learning literary oral expression. All lecturers from the three sample universities stated that teaching materials for literary oral expression should contain material that includes the definition of learning literary oral expression, context, types, and practices of literary oral expression, and their examples. Then, all lecturers also stated that the content in the textbook should contain collaborative content supported by relevant discussion objects, along with a review of the humanist values contained in the material.

Next, concerning the linguistic aspects of coursebooks, all lecturers argued that the language used in the preparation of coursebooks should be communicative and the diction should be in accordance with the learning of literary oral expression so that it is easy to understand.

Finally, concerning the graphics of the coursebooks for learning literary oral expression, all lecturers were of the view that the coursebooks should be presented with the appropriate font type and size, have relevant covers, and contain content and illustrations that support the process of learner understanding in learning literary oral expression.

(b). Students' Perceptions of Digital Textbooks for Learning Literary Oral Expression

Students' perceptions of digital textbooks for learning literary oral expression were reviewed based on the results of filling out a questionnaire by 120 student representatives from three sample universities, namely Semarang State University (UNNES), Sultan Agung Islamic University (UNISSULA), and Muria Kudus University (UMK). Based on the results of the questionnaire, researchers know how the content/material of teaching materials, material presentation, language presentation, and graphics are expected by students in terms of learning literary oral expression.

Based on the questionnaire results, the researcher can conclude that all students who became the research sample had taken the learning of literary oral expression, so they already had an idea of the teaching book they wanted by comparing it with existing teaching books. Judging from the questionnaire results, 50% of students still use textbooks prepared by lecturers, and the other 50% have used additional references from print and electronic media. Concerning the description of the material in the textbook, 100% of students stated that they had not felt enough in-depth material because the material presented was incomplete, lacked motivation, and triggered cognitive aspects of learning.

Next, when it comes to the presentation of material, students also said that they were not satisfied with the presentation of existing material. Moreover, 100% of students stated that the textbooks for learning literary oral expression should contain complete and comprehensible learning material, with the inclusion of collaborative content that supports the material and humanist values in it.

Regarding the presentation of language, 100% of students stated that the language used in the textbook for learning literary expression should use language rules that are in accordance with EYD and communicative to facilitate the process of understanding the material. In addition, the choice of words, or diction, must also adjust the level of student reasoning.

Finally, concerning the presentation of graphics, students argue that the graphic presentation of textbooks should be adjusted to the interests of students, apart from adjustments to the content of learning materials for literary oral expression. The alignment of learning materials' content with graphic elements serves as a benchmark for how attractive students find coursebooks.

B. Discussion

Depending on the results of interviews and filling out questionnaires by lecturers and students, it was revealed that there is no adequate coursebook to be utilized in learning literary oral expression, especially in digital form, that meets all the expectations of both lecturers and students for proper coursebooks. Therefore, in developing coursebooks, the authors need to pay attention to the perceptive matters from lecturers and students so that the coursebooks developed can have a significant impact on the learning of literary oral expression.

In addition, based on the results of interviews and questionnaires, it was also revealed that the contents of existing textbooks used in three universities have not fulfilled humanist values, which are very urgent to be applied in literary expression learning materials. Humanist values should be included in the learning materials for literary oral expression because they can influence the development and strengthening of the character of Indonesian Language and Literature Education students who are future educators. The textbooks that are prepared should contain humanist values that appear in literary works so that they can inspire students to express literature orally by considering relevant humanist values (Qomariyah et al., 2019; Yohannes et al., 2023).

Regarding the availability of learning resources, both lecturers and students are of the view that textbooks are an important component in learning that must be adjusted to the CPMK, in this case, the CPMK for Learning Oral Expression of Literature. Through textbooks for learning oral expression of literature, students can gain in-depth knowledge by studying literature and the values contained in it. Furthermore, based on the results of interviews and questionnaires, it can be seen that the number of textbooks for learning literary oral expression is not sufficient, both in printed and electronic form. In fact, the availability of appropriate textbooks in the library is very helpful for students to understand learning materials. Concerning this question, learning resources for literary oral expression that contain humanist values need to be provided optimally to support the process and results of learning literary oral expression.

Relating to the perceptions of lecturers and students regarding teaching books for learning literary oral expression, it can be concluded that the preparation of teaching books should apply development principles that pay attention to

substantive and display aspects. Teaching materials for literary oral expression with humanist values are developed based on the principles of teaching material development. The principles of teaching material development include substantive and display aspects. Substantive aspects consist of (1). the principle of relevance, (2). the principle of consistency, (3). the principle of sufficiency, (4). the principle of flexibility, and (5). the principle of efficiency. The display aspect consists of (1). the principle of contiguity, (2). signaling, and (3). redundancy.

The principle of relevance, or linkage, means that the material developed in the textbook is material that is relevant to the achievement of the CPMK. The principle of consistency, or constancy, means that coursebooks should be prepared with the number of achievements that students must reach. If students must accomplish four achievements, then what is described in the coursebook should also be four, and so on. The principle of adequacy means that coursebooks must contain sufficient and proportional material to help students master the material being taught. The principle of flexibility means that the textbooks developed should have flexible properties and can be accessed anywhere and anytime, for example, such as digital textbooks that adjust to technological developments. The principle of efficiency means that coursebooks need to be developed by paying attention to the comparison between energy, time, and costs incurred so that the preparation of coursebooks remains consistent and stable.

The principle of contiguity means that the collaboration of textual content, images, audio, and audio-visual content contained in the book presentation should be presented simultaneously and describe the material, concrete examples, and explicit humanist values. The principle of signaling means that coursebooks need to include marking or material identity so that students can more easily understand the context and discussion of the material in the coursebooks. The principle of redundancy means that coursebooks need to be developed using sufficient, and not excessive, elements, and according to their functions.

IV. CONCLUSION AND SUGGESTIONS

A. Conclusion

Based on the results of the research and discussion that has been described, it can be concluded that first, lecturers and students perceive that textbooks for learning oral expression of literature are not adequate and have not had a significant impact on student learning outcomes. Second, lecturers and students perceive that textbooks for learning oral expression of literature have not included humanist values, which absolutely must be developed among Indonesian Language and Literature Education students as prospective educators. Finally, lecturers and students perceive that textbooks used as teaching materials should have easy access and pay attention to substantive aspects such as linguistic and graphical aspects.

B. Suggestions

Based on the research results that have been described, the researchers suggest that first, the developed coursebooks need to contain relevant material, examples, and humanist values. Second, coursebooks need to be prepared by paying attention to related CPMK, in this case learning literary oral expression. Finally, coursebooks need to present language and graphics that are not only part of the aesthetics of the book but also an issue that has an impact on the learning process of students.

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The Impact of Emotions on Distance Learning Among Double-Major (French-English) and Geography Students During and After the Health Crisis

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Abstract—This study seeks to demonstrate that students' emotional states during distance learning—especially feelings of anxiety and isolation—have a significant impact on their academic performance and engagement, both during the health crisis and during the subsequent transition back to traditional learning environments. We would like to examine the impact and experience of students attending distant learning courses at the university and the teachers' competencies developed in order to have a better pedagogical experience. The study's questionnaire was distributed to a group of 152 students aged 20 to 22. These students were enrolled in adult education courses focused on foreign languages and geography. By integrating these two fields, this research offers a distinctive perspective compared to existing literature on emotional issues in distance learning. The questions addressed the various social and technical challenges students faced during and after the confinement and health crisis, as well as their emotional experiences on social media. We found that for all these questioned students, the feelings felt during an online course have an impact on learning in the online environment, in particular motivation, self-regulation and academic success. The study's findings suggest that collaborative efforts among teachers are very important in this context in order to guarantee inclusion among students and to promote emotions that enhance learning.

Index Terms—distance learning, emotional intelligence, emotions, education, self-regulation

I. INTRODUCTION

In November 2019, the infectious disease COVID-19 emerged in China and quickly spread globally. To curb the disease's transmission, many countries implemented periods of confinement. The education sector was among the first to feel the impact of these lockdowns and preventive measures. On March 17, 2020, confinement was declared in Amman, Jordan, prompting universities to overhaul their entire educational systems. They shifted from face-to-face learning to a completely different model, with distance learning becoming the only viable option. To mitigate both the short- and long-term effects of the university lockdown and to ensure continuity in education, universities in Jordan, like many others worldwide, adopted distance learning as their primary mode of instruction. This transition highlighted the urgency of adapting to new educational frameworks in response to unprecedented challenges.

It is true that our universities are already equipped for this new educational model. However, transitioning fully to online learning and interacting with students solely through screens or microphones for extended periods (2020/2021) have created a different emotional, social, and educational reality. Years later, can we say the outcomes are satisfactory? What steps can we take to effectively transform the education sector in the aftermath of the COVID-19 pandemic? Based on our experience as university professors, we have observed that emotions significantly impact the distance learning process. For example, a simple word of encouragement or a thumbs up from us can greatly enhance a student's motivation to prepare for the next class and inspire them to seek further praise.

II. LITERATURE REVIEW

Numerous studies have explored the connection between distance students and their emotions through behavioral data. One study developed a mathematical model based on Dempster-Shafer theory to analyze the online learning process and provide evidence for a framework measuring distance students' academic motivation (Li et al., 2018). In their evaluation of pre-service teachers' experiences with core courses in both traditional and distance education programs at education colleges in Ghana, researchers emphasized a connectionist learning theory to develop a new learning model for distance education, ensuring that the teaching content aligns with the emotional education goals of the course (Narh-Kert, 2021). Additionally, another study established a model for predicting student emotions in a distance learning environment using

fuzzy cognitive mapping. This model aims to forecast a distance student's emotions to adjust the real-time teaching approach accordingly (Mei et al., 2017). Other studies have examined how to integrate emotion regulation instruction into existing daily practices and routines, utilizing the RULER approach in the social sciences and humanities. This research analyzes the academic emotions of distance students in social studies courses (Hoffmann et al., 2020). Some studies introduced a mathematical model that captures the facial expressions of distance students. This model employs SIFT feature extraction to identify and recognize the emotions and reactions of these students (Xu et al., 2021).

In the research paper "An Empirical Study of the Influence of Online Learning Behaviors on Learning Outcomes in Blended Teaching Mode"—focusing on College English Listening—the researchers conducted an extensive data analysis of online learning behaviors among 152 students at ZYU. The aim was to explore how online learning attitudes and behaviors impact learning outcomes within a blended teaching platform. The findings were intended to offer practical suggestions for the design and management of foreign language blended courses (Wei, 2023). Another study examined the effects of an intervention method designed to support students' Self-Regulated Learning (SRL) on student behavior regarding course completion and SRL scenarios. The SRL was assessed using trace data variables that indicated student activity. The results indicated that the intervention positively influenced students (Jansen et al., 2019). Other researchers conducted a systematic review of online trace data analysis to measure self-regulated learning across various learning platforms. Their goal was to address three main questions: "How have previous studies utilized online trace data as indicators of SRL? What methods are employed to interpret this data? What challenges arise in using online trace data to measure SRL?" (Du et al., 2023). In another study, researchers examined the differences in learning outcomes among various categories within an online learning environment. This investigation involved a sample of 240 undergraduate students and found that high-performing students demonstrated significantly higher levels of engagement in all behaviors compared to their low-performing peers during the anaphase (Han et al., 2023). Moreover, a recent study like "The Impact of Online Learning Formats on Emotional Responses and Academic Performance in EFL Courses", explores students' initial emotional responses anxiety, confidence, and willingness to engage across two online learning formats: real-time and pre-recorded classes (Chong, 2025). Another one, also published in 2025; "The Role of Academic Emotions in Learning: Addressing Student Motivation, Performance, and Learning Strategies" aims to provide a comprehensive overview of academic emotions, highlighting the importance of valence, activation, and gender differences, while also suggesting new directions for future research (Xie & Fan, 2025). "Revisiting Demotivators in the EFL Classroom: The Interaction Effect between Gender and Performance on Negative Teacher Behavior" is also an important study published in 2024. This study explores how gender and academic performance influence student reactions to demotivators in EFL classrooms, focusing on negative teacher behavior, loss of task value, and low expectancy for success. Using the Learner Perceptions of Demotivators Scale, data from 320 undergraduate students in China revealed that female students required more supportive teacher behavior and that low-performing male students were less affected by negative teacher behavior. The findings highlight the need for tailored teaching approaches and suggest directions for future research (Xie et al., 2024).

III. METHODOLOGY

While there are promising studies on emotional reactions in online behavior, a deeper understanding of feelings expressed in online communication and social media—particularly in the context of learning and teaching—is essential. It is important to examine the emotional competencies of tutors as perceived by students in an online-only learning environment. To investigate this, a study was conducted to assess the emotional impact on the performance of students enrolled in fully distance courses. A questionnaire was distributed to a sample of 152 students from a double major program in Double Major (French-English) and Geography, aged between 20 and 22. The questionnaire comprised six sections:

- Students' gender, age, and place of residence.
- Students' activities on social networks and their emotional impacts.
- Emotions experienced during distance learning courses compared to previous face-to-face lessons.
- Advantages and disadvantages of technology for educational purposes, including time management in online learning.
- Student needs and expectations: Characteristics of the best professors in a virtual course and students' expectations in a digital environment.
- Tutor attitude impact: The effect of the tutor's attitude on students' motivation.

We conducted validation and pilot testing on the questionnaire to ensure its reliability and relevance. While the results may not be fully generalizable to all student populations, they provide valuable insights into the dynamics within these specific groups, which can inform future studies across broader contexts. This comprehensive approach aims to shed light on the emotional dynamics in online learning contexts, enhancing the educational experience for both students and tutors. In the study, only the first two sections consisted of closed questions, requiring students to choose between "yes" or "no" responses, preference questions (like/unlike), or demographic inquiries regarding gender, age, and place of residence. The remaining sections featured open-ended questions that encouraged students to express their feelings, make comparisons, discuss solutions, and articulate their expectations. For instance, questions like "Define the characteristics of the best

teacher in an online course. Are they the same as in a face-to-face course?" provided valuable insights into students' needs and expectations. Here are examples of students' responses to some open-ended questions:

Theme of the open-ended question	Example of answers
Teacher engagement	"A good teacher interacts frequently with students, provides personalized feedback and can help students to be valued."
Clarity of instructions	"Clear guidelines are essential for online learning."
Disadvantage of technology in education	"The lack of personal interaction. I struggle with self-discipline and time management when learning online, making it harder to stay engaged with the material."
Expectations in a digital learning environment	"Clear communication and timely feedback from the instructor. Overall, a supportive atmosphere that fosters both learning and personal growth is highly needed."

These open-ended responses served as real feedback in the students' own words, allowing a deeper understanding of how they feel, react, and behave while participating in online courses. This qualitative data was instrumental in synthesizing the emotional dynamics and preferences of students in a distance learning context. The questions in the survey addressed the various changes that prompted ongoing social and technical reactions from students during the confinement and health crisis. They explored the emotions students experienced on social networks, particularly how they felt after receiving comments—both negative and positive—on their statuses or photos. Additionally, students were asked about their feelings during virtual courses, while completing assignments, or during online exams.

The survey aimed to achieve a deeper understanding of the shifts in learning modes and to support students in navigating their new emotional needs within a distance learning context. Furthermore, the study aimed to help teachers cultivate new professional skills tailored for online courses. Its objective was to actively engage and motivate students in the changing educational environment. By emphasizing emotional competencies and responses, the research underscores the significance of addressing the emotional dimensions of online learning. This emphasis is vital for improving the overall online learning experience, enabling both students and instructors to effectively navigate the challenges and opportunities of distance education.

IV. RESULTS

Based on the study, the gender composition of the examined group revealed that the majority of the students were female. The dominant age within the group was 22 years, and a significant portion of the students (94%) resided in Amman. The details regarding the characteristics of the examined group are summarized in Table 1 below:

TABLE 1
THE CHARACTERISTICS OF THE EXAMINED GROUPS

		Frequency	Percentage	Total
Gender	Female	146	96%	100%
	Male	6	4%	
Age (Year)	20	7	5 %	100%
	21	32	21%	
	22	113	74%	
Place of living	Amman	143	94%	100%
	Out of Amman	9	6%	

In the second part of the study, we found that all students had social media profiles, especially on Facebook. These young adults indicated that they spent more time on social media during and after the confinement period. Analysis indicated that many students perceive themselves as isolated, a feeling that intensified during the lockdown. Furthermore, the results revealed that these students are experiencing a socio-emotional crisis. They often view social media and the internet as a reflection of their reality—a mirror of their lives. Each comment or compliment can significantly influence their mood, whether positive or negative. Activities such as updating statuses or changing profile pictures are closely evaluated by their audience, which in turn impacts their emotional state and motivation. Actually, receiving a like or an unlike can sway their mood throughout the day. This finding aligns with insights from a book titled *The Selfie Generation: How Our Self-Images Are Changing Our Notions of Privacy, Sex, Consent, and Culture* by Alicia Eler. Eler (2017) notes that "the same brain areas that are activated for food and water are activated for social stimuli". This suggests that social reinforcers, such as a smile or a hug, while abstract, elicit similar activity in the brain's reward centers, highlighting the profound impact of social interactions on emotional well-being.

The third part of the survey highlighted the significance of the study by demonstrating that the emotions experienced during online courses directly impact students' learning outcomes, including motivation, self-regulation, and academic success. Emotions such as anger, anxiety, pride, boredom, and motivation can influence students and the learning process in various ways. During the confinement period, many students reported increased levels of worry and boredom, struggling to remain engaged and connected with their instructors. These feelings were articulated in the survey through statements such as "I was stressed all the time. I felt insecure". "I couldn't keep my eyes open. I was stressed and kept feeling angry for no reason. That distracted me a lot". "I don't want to answer because I was afraid of being intimidated". "For me, online means boredom". "The course is being recorded, and I prefer not to participate. I'm worried about giving the wrong answer, which my classmates would see in the recording". These testimonies reveal a common theme: students

struggle to build the confidence needed to express themselves and succeed in an environment where they fear criticism, whether from their peers or instructors. The emotions related to learning in this context do not differ significantly from those experienced in response to social media interactions, like receiving a like or dislike on Facebook. Understanding how these emotions are experienced and managed by students is fundamental for grasping their impact on distance learning. This insight can help educators develop strategies to foster a more supportive online learning environment, thereby enhancing student engagement and success.

In the fourth part of the survey, we found that 89% of students perceived advantages of technology in the learning process, such as improved access to information, ease of learning, and enhanced communication. For these students, distance education offers the flexibility of asynchronous learning, allowing them to engage with material at their own pace and from various locations. This flexibility was particularly beneficial for those living outside Amman, as it eliminated the need for travel.

However, the survey also revealed significant concerns. According to 93% of the respondents, the lack of face-to-face supervision from teachers could result in poor management and organization of the learning process. While students acknowledged the benefits of distance education, they also highlighted its disadvantages and limitations. Many expressed a preference for face-to-face or hybrid courses, where they could maintain some level of interaction with professors and classmates. Students reported that the individual nature of distance learning contributes to feelings of isolation and loneliness. Additionally, all students who spent considerable time on computers and other devices noted that this led to eyestrain and other physical issues, which diminished their energy and enthusiasm for learning.

The survey revealed that all students reported a positive influence from using email, WhatsApp, and chat on Microsoft Teams. These tools facilitate ongoing contact with teachers, allowing students to ask questions at any time, obtain specific information quickly, and receive feedback. This constant connectivity promotes collaboration among students, particularly for group assignments. For these students, being part of a course group on WhatsApp or email boosts their feelings of security and belonging while studying from home. Additionally, the content of the messages they receive significantly influences their online engagement. Positive and encouraging messages boost students' enthusiasm for the course. Examples of such messages include "I can't wait to see your excellent work or presentation next class". "I'm sure you'll do well". "I hope that you are doing well, dear students". "I eagerly await your feedback on ...". "I am proud of your results". On the other hand, messages that are devoid of encouragement or warmth can diminish their motivation and enthusiasm for the virtual course.

The analysis of these four parts illustrates that emotions and impacts are integral to how students engage with social media and the internet. This understanding led to a fifth part of the study, aimed at recognizing the expectations and needs of these young adults in a digital environment. Consequently, a key question arises: What are the needs and expectations of our students in this "digital environment"? The testimonies collected from the examined group in this fifth section were very important for the study's results, providing valuable insights about their preferences and needs for successful online learning.

Our students need to feel secure when reading, commenting, or asking questions in virtual courses. They anticipate that teachers will create an environment free from criticism, where their questions and comments are treated with respect and support. The teacher's demeanor is essential for creating a secure relationship based on respect and trust. Survey results indicate that this sense of safety significantly boosts students' interest and motivation in online courses. Important qualities that students appreciate include patience, attentiveness, admiration, and respect, even for efforts that may not be outstanding. According to the survey, the ideal professor is one who promotes effective two-way communication. Students highlighted qualities such as "Who listens", "Who is fair", "Who gives us the chance to communicate and discuss, no matter how ignorant we are about the subject", "Who gives us time to say what we want to say".

For this group, the best instructors are those who actively listen and provide ample time for students to express themselves. A strong communication relationship between teachers and students enhances learning potential and contributes to the overall success of the learning process. Moreover, positive, cheerful, and dynamic discussions in the virtual classroom, along with teachers' encouraging behaviors, can cultivate a supportive environment. This not only helps students academically but also fosters emotional growth, creating a more holistic educational experience. Additionally, the survey revealed that students are particularly sensitive to teachers who create feelings of resentment, leading some to feel marginalized or excluded during virtual discussions or through messages. Many students highlighted the importance of fairness, equity, and equality, emphasizing that these principles are essential in their learning environment. When teachers practice equality and equity, it encourages students to participate more cooperatively and fosters a sense of belonging within the course and group. This inclusive approach not only enhances student engagement but also contributes to a supportive and collaborative atmosphere, where all students feel valued and heard.

V. DISCUSSION

All the findings from the previous sections, particularly the fifth part, support the idea that emotions play a crucial role in online learning and underscore the importance of a collaborative attitude among teachers to ensure inclusion among students. In the context of virtual learning, the tutor faces significant challenges, which brings us to the final aspect of the study: the tutor's attitude. The collaborative demeanor of the teacher is closely linked to emotional competence, defined as the ability of students to identify their emotions, think critically when emotionally activated, and regulate their

emotional states. Thus, the assertive and supportive attitudes of teachers, along with inclusive strategies, are crucial for creating a favorable learning environment. This approach strengthens relationships with students and promotes their involvement. Moreover, the opportunity for linguistic exchange and oral expression is essential, particularly for Arabic-speaking students learning French, as they often lack exposure to a French-speaking environment in our predominantly English and Arabic-speaking country.

Numerous studies have shown the clinical impact of emotions on learning, which result in chemical and hormonal changes in both the brain and body. In this regard, Priscilla Vail's study, "Emotion: The On-Off Switch for Learning" provides valuable insights (Vail, 1994). Vail describes emotion as the "on-off switch to learning", indicating that when the switch is off, learning potential is idle. Conversely, when the switch is on, the learning pathway opens up. The limbic system plays a pivotal role in this process by interpreting sensory information and relaying it to the cortex for processing. This system sets the emotional tone of the information before it reaches the cortex. Positive interpretations lead to intentions and excitement, motivating behavior and enhancing thinking and learning. In contrast, negative interpretations turn the switch off, stifling reflection and learning. This relationship between emotions and cognitive processes is further supported by Hildy Gottlieb's article "Why You Aren't Thinking Clearly: The Brain Science of Fear in Uncertain Times." Gottlieb explains how feelings of threat or discomfort can impair clear thinking, reinforcing the idea that emotions are critical for effective learning (Gottlieb, 2020).

In conclusion, our study emphasizes the critical role of a teacher's attitude, emotional competence, and inclusive practices in fostering a supportive learning environment that enhances students' emotional well-being and academic success. According to our findings, 100% of the examined students agreed that positive emotions—such as confidence and satisfaction—can significantly improve learning achievements. Conversely, emotions like anger, fear, sadness, and depression can hinder their ability to learn and think clearly. These findings align with other important research "The Influences of Emotion on Learning and Memory" (Tyng & Malik, 2017). This paper presents an evolutionary perspective on emotion, illustrating its effects on learning and memory. The authors highlight the role of emotion and motivation in enhancing perceptual processing through attentional components, which help organize and select salient information in a manner linked to psychological interest. However, the impact of emotions on the learning process remains a topic of debate. Although some studies suggest that positive emotions enhance learning and lead to academic success, it's important to recognize the impact of students' emotional responses and a teacher's emotional intelligence in promoting adaptive emotions in students. It is vital for instructors to skillfully handle their students' feelings, reactions, and emotions to address different situations in both classroom and online environments. This suggests that instructors need a certain degree of emotional intelligence to ensure effective teaching. This focus on emotional intelligence is central to the sixth section of the survey, which delves deeper into the skills and qualities teachers require to support their students effectively.

The responses from the examined students were remarkably consistent in this part of the study. They emphasized that for a more effective learning experience in a virtual context, instructors should strive to create a less detached classroom environment. A key element of this effort is building strong connections and relationships between teachers and students, which strengthens the tutor's role. This relationship is reciprocal: students gain knowledge from the teacher, who aims to make learning enjoyable and accessible while continuously refining their teaching skills to be clearer and more effective. Since students have varied interests, attention spans, self-management abilities, and levels of intelligence, the teacher has an extra responsibility to create an engaging learning experience that enables all students to benefit equally from the course. This inclusivity not only addresses individual learning needs but also fosters a cohesive and supportive classroom atmosphere, ultimately enriching the overall educational experience.

From this discussion, we can conclude that online instructors need emotional competence, which is fundamental for excelling in their teaching roles. This competence includes effective communication and the ability to positively impact students, helping them to respond as desired. By developing these emotional skills, teachers can cultivate adaptive emotions that improve learning outcomes. Synchronous discussions through chats or videoconferences allow teachers to read and recognize student emotions that may impact their learning progress, including feelings of uncertainty, confusion, interest, or enthusiasm. The use of cameras provides a valuable tool for detecting real-time expressions of student emotions, offering instructors insights into how students are feeling during virtual classes. However, it's important to note that at the University of Jordan, using cameras is not mandatory. Students have the option to keep their cameras off during virtual classes, which means that many instructors often lack visual cues from their students. As a result, analyzing voice tone, written text, and online speech in discussion forums becomes a primary method for gauging students' emotions.

Mayer and Salovey proposed a model that identifies four distinct levels of emotional intelligence, emphasizing that this form of intelligence is not merely about processing emotionally charged information. They define emotional intelligence as the ability to monitor one's own feelings and emotions, as well as those of others, and to discriminate between them (Mayer et al., 2008). This definition implies that both teachers and students possess the capacity to identify, harness, and regulate their emotional states to achieve desired outcomes. It is mainly the tutors' responsibility to demonstrate this emotional intelligence. Instructors should develop personal qualities and skills like adaptability, enthusiasm, and the ability to positively impact others—traits that are vital for effective tutoring, whether in online or in-person environments. The mission of a teacher is undoubtedly challenging, as creating a strong learning environment is one of their most significant tasks. Moreover, the integration of neuroscience and education offers a promising partnership for developing evidence-based solutions to enhance 21st-century learning. Research indicates that students who thrive in

a relaxed environment experience less overwhelm. Chronic stress can undermine learning by impairing students' concentration abilities, whereas those in a more relaxed atmosphere tend to demonstrate better brain function (Carew & Magsamen, 2010). This highlights the significance of emotional intelligence in creating a supportive learning environment that promotes student well-being and academic achievement.

Subjects such as Geography and Foreign Languages can be especially difficult to learn online. For Jordanian students, mastering languages like French or English demands considerable attention and focus, particularly when it comes to learning new vocabulary and interpreting literary texts from different eras. Consequently, depending only on multimedia resources—like images, animations, sounds, and videos—may not be enough to create engaging and effective learning experiences. These resources frequently neglect the emotional states and preferences of students. Therefore, emotional intelligence is essential for teachers' professional success in virtual courses and significantly impacts students' academic achievement. By creating an emotionally supportive environment, teachers can improve the learning experience, making it more effective and engaging. Therefore, integrating emotional intelligence into online teaching is essential for creating a more suitable learning environment for students. This is important because students frequently experience various emotions during their educational journeys, which can affect their cognitive abilities. Integrating emotional intelligence is therefore crucial for the success of the learning process, as it helps manage students' emotional reactions. Additionally, teachers must improve their skills and knowledge of cognitive theories to better analyze and understand students' reasoning in an online learning environment.

The role of students in a virtual environment is equally significant. They need to actively participate in their learning by being aware of their emotional states and understanding how these emotions influence their academic performance. Students should engage with the material, participate in discussions, and communicate openly with their instructors about any difficulties they encounter. By cultivating their own emotional intelligence, students can more effectively navigate the challenges of online learning, manage stress, and improve their overall educational experience. In his book *The Student's Craft: The Entrance to University Life*, Alain Coulon highlights that a student's main responsibility when starting university is to learn the "student job". His hypothesis indicates that students who do not develop a sense of belonging often face academic challenges (Coulon, 1997). Coulon outlines three transitional phases that represent the process of becoming a student: the time of strangeness, the time of learning, and the time of affiliation. The "job" of a student involves mastering the rules and conventions of university life. Affiliation goes beyond merely acquiring the necessary skills; it also requires students to demonstrate these skills to gain recognition as a member of the student community, whether within their class or cohort. Students who do not successfully affiliate risk being eliminated or self-eliminating from the academic environment. Coulon argues that many students fail because there is a disconnect between their existing know-how and the expectations of university life. He states that "to join the university world would therefore be, from an intellectual point of view, to know how to identify work not explicitly requested, knowing how to recognize it and knowing when to accomplish it" (Coulon, 1997). This highlights the importance of not only understanding the formal requirements of academic success but also being attuned to the informal expectations and dynamics of university culture. Overall, Coulon's insights underscore the significance of social integration and emotional intelligence in navigating the complexities of university life, which can greatly impact students' academic experiences and success.

The idea of the "student job" emphasizes the need for students to develop a particular type of emotional intelligence that aligns with their experiences and responsibilities as learners. This emotional intelligence is especially important in online learning, where students must navigate the complexities of belonging to a virtual community. They are responsible for integrating themselves—whether fully, partially, or not at all—into their virtual classes and groups. This integration directly impacts the effort they invest in their distance learning and the effectiveness of their educational experiences. Since students often work independently in online environments, they cannot depend on external pressures to guide their actions. Instead, they need to cultivate the ability to self-motivate in order to maintain their academic engagement and progress. Therefore, students' emotional intelligence is crucial for enhancing self-confidence. They must believe in their capabilities to tackle coursework, which can be especially difficult in a virtual setting. Additionally, fostering an interest in their subjects can help students stay engaged, making the learning process more enjoyable and effective. Students should learn to recognize and manage their emotional responses to various challenges, whether they feel overwhelmed, frustrated, or excited. By developing these aspects of emotional intelligence, students can improve their online learning experiences, create a sense of belonging within their academic community, and ultimately achieve success in the virtual classroom.

VI. CONCLUSION

Educational research, especially regarding online teaching and learning, frequently neglects or downplays the significance of emotions. However, it is important to acknowledge that students' emotional experiences greatly influence their learning abilities, dedication to their studies, and even their career decisions. This underscores the need to focus on the social and psychological elements of education, including the relationships between students and teachers, as well as among the students themselves. These relationships are fundamental to the educational experience, as they evoke a range of emotions that can either facilitate or impede learning. Understanding emotions and their effects on cognitive processes can lead to more effective teaching and improved learning outcomes. While online learning has made strides in providing quality education, it still struggles to replicate the dynamics of a traditional classroom. There are inherent obstacles in

online environments that need to be addressed. Research efforts should therefore prioritize training educators in emotional intelligence to enhance both their teaching effectiveness and the emotional well-being of students. This includes fostering strong, positive relationships with students, which can significantly influence their academic experience.

A significant drawback of research on emotions in distance learning is self-report bias, where participants might not accurately express their feelings or may answer in ways they believe are more socially acceptable. This can lead to data that fails to truly represent their emotional experiences. Additionally, cultural differences can affect how emotions are understood and expressed; what is considered an acceptable emotional reaction in one culture may differ in another, which could limit the applicability of the findings to diverse populations.

Recognizing and addressing students' emotions is essential for their personal growth and academic success. To facilitate this, personalized online teaching methods should be created, focusing on delivering quality learning experiences that take into account the influence of every interaction—whether it's a word, gesture, text message, or email. This approach can help nurture a generation of confident and independent learners who are engaged in their education and future careers, regardless of their emotional states. By emphasizing emotional intelligence in teaching and learning, we can establish a more supportive and effective educational setting that caters to all students' needs. Incorporating discussion boards or forums allows students to share their thoughts and feelings about the course and their learning experiences. Encouraging constructive feedback through tools like Google Forms helps them provide suggestions for enhancement. Moreover, promoting a sense of belonging through team-building activities and icebreakers fosters relationship-building among students. Collectively, these strategies help create a more emotionally supportive online learning environment.

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Reimagining Disability as Knowledge: Empowerment and Identity in Selected Speculative Fiction

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Abstract—This paper analyzes the representation of disability as knowledge in two speculative fiction narratives, Annalee Newitz's *Autonomous* (2017) and Robert Venditti's *The Surrogates* (2006). Drawing upon disability studies theories, specifically Crip Theory, Cripistemology, and Crip Technoscience, this paper explains that in each work, disability is not understood as a deficit or lack; instead, disability is portrayed as a difference, an affirmative source of power, agency, and knowledge production (Johnson & McRuer, 2014). In *Autonomous*, the disabled heroine, Jack, uses biohacking to gain freedom, turning her body into a weapon and undermining her personhood. Meanwhile, *The Surrogates* serves as a scathing commentary on the technology industry and the beauty standards it promotes, as well as the plight of physically challenged persons in the computer-mediated avatar environment that favors the physically fit. By closely examining these texts, the paper demonstrates how they enable new modes of representing disability, which are made possible by digital and cybernetic bodies, and urges a future in which disability will be accepted as a form of human diversity and knowledge (Newitz, 2017). This paper contributes to the ongoing conversations in disability studies about how speculative fiction can challenge and expand our understandings of disability, alternative ways of knowing technology, embodiment, and justice (Siebers, 2008).

Index Terms—crip theory, biohacking, disability representation, speculative fiction

I. INTRODUCTION

Disabilities have historically been perceived through a medical lens, in which individual "deficiencies" were seen as things to be overcome and "repaired" (Goggin & Newell, 2005). This is the kind of view that treats disabled people as little more than the receptacles of care and measures their lives in terms of what they cannot do. Recent work in the field of Disability Studies, especially in terms of crip and disability epistemology, challenges this restricted view. Theorists such as Merri Lisa Johnson and Robert McRuer have introduced the idea of cripistemology, where disability is not simply a deficit in need of healing but a system of knowledge (Johnson & McRuer, 2014). This system is based on the experiences of people with disabilities, who bring knowledge about different ways of making sense of and constructing society, politics, and technology through their embodied understandings (Siebers, 2008). In this model, disability serves to expose the constructed nature of societal norms by deconstructing and reconstructing our understanding of the world, along with the values associated with it. It challenges conventional ideas about human beings and their ways of being and doing, while also playing a role in (re)producing norms, particularly those related to abilities (Goggin & Newell, 2005).

Derived from this theoretical gaze is the concept of crip technoscience, established by Aimi Hamraie. Simi Linton examines the uses of technology by disabled people, as they modify and reconfigure technology to suit their own needs, which unsettles hegemonic technological forms. This gaze challenges the normative view of disability as something to be neutralized or remediated with technology. Instead, it acknowledges how disabled individuals use technology to improve their lives, making them more accessible to themselves and providing innovative solutions that not only meet personal requirements but also challenge the social role of what personal tastes should or should not do (Hamraie, 2017; Linton, 2015).

This perspective also sets the groundwork for a future that resists the exclusion of disability. Alison Kafer's notion of the *crip future* advocates for an alternative future where disability is not something to be erased from existence but rather is seen as a crucial component in realizing true diversity within humanity (Kafer, 2013).

This paper addresses these issues by analyzing two works in speculative fiction: Annalee Newitz's *Autonomous* (2017) and Robert Venditti's *The Surrogates* (2006). By placing these texts within the contexts of futuristically imagined technological communities, these narratives of disability offer a powerful, nuanced vision that sees disability not as something to be solved, but as something that generates knowledge, agency, and resistance. Both works reject a technableist narrative in which the goal of technology is to eradicate disability, and both refuse to imagine a world in which disabled characters are excluded from thinkers, problem-solvers, or change agents. For example, in *Autonomous*, Jack is a pain slave who longs for the torture that induces pleasure and serves as a political sensor for the war against pharmaceutical capitalism. *The Surrogates* does not embrace the "perfect" avatars that society idealizes, nor do its characters conform to the "superhuman" mold that technology promises. These figures exemplify crip technoscience, and they remake what it means to be entangled with technoscientific objects (Venditti, 2006; Newitz, 2017).

The research problem of this study is the under-representation and misrepresentation of disability in speculative genres, particularly in the context of digital media and gaming narratives, where disabled characters are often absent or stereotyped as villains. These stories use disability as a trope or narrative device, cyborgs as broken bodies needing repair, villains who are disabled and should be pitied, and disabled beings who should be erased from the narrative. These portrayals perpetuate damaging clichés and silence the epistemic agency of disabled people. This paper contends that digital and gaming narratives have much to gain in incorporating disability as a crucial epistemic modality, unmasking the crip forms found in *Autonomous* and *The Surrogates* to speculate on the futures in which disability is not only tolerated but is also recognized as integral to the production of knowledge, technological advancement, and critical social commentary (Siebers, 2008).

II. LITERATURE REVIEW

A. Disability Representation in Literature

Traditionally, disability in literature was influenced by social attitudes that positioned it as a tragedy or state of being that required pity. Such representation is often also grounded in medical model assumptions about disability; disability is characterized as an individual problem that needs to be "fixed" or cured. Disabled characters tend to be crippled old men or boys, and their disability is portrayed as either an indication of moral superiority or evil, to create an air of pathos, or to illustrate the depravity of the character. For example, figures such as Quasimodo in *The Hunchback of Notre-Dame* and Heathcliff in *Wuthering Heights* personify human rejection, and their disabilities shape their stories (Siebers, 2008; Garland-Thomson, 1997).

This is in stark contrast to post-World War II literature, which began depicting disabled characters as more nuanced, multidimensional figures, with stories that contested previous depictions. Disability studies scholars such as Tobin Siebers and Rosemarie Garland-Thomson have criticized the representation of disability as a metaphor in literature, showing how it is often complicit with ableism. For instance, Siebers (2008) replaces disability with political identity as a locus and argues that disabled people need not be excluded from society; they should be included in society, not secluded.

Despite this history, able-bodied literature continues to have difficulty portraying disability as anything other than a handicap or burden. The problem in literature now is writing stories from an impaired viewpoint without reducing the individual to their impairment; rather, they are portrayed as an individual with desires, dreams, and a purpose in society (Garland-Thomson, 1997).

B. Disability in Digital and Gaming Narratives

Expanding on Crip Theory, Cripistemology, and Crip Technoscience within the context of digital and gaming narratives, disability provides an avenue for imagining it as a form of knowledge and power, rather than something that needs repaired. The development of digital media, the game, and informatics has introduced a new regime of representation for disability. In the era of avatars, cyberspace, and digital identities, these elements allow characters to transcend the physical body and achieve things that would be impossible in the material world. In works such as *Ready Player One*, *The Surrogates*, and *Autonomous*, the virtual environment becomes a place where normative modalities of being able-bodied are not only challenged but also exceeded, enabling characters to surmount bodily restrictions and engage with the world in inventive ways (Cline, 2011; Venditti, 2006; Newitz, 2017).

In *Ready Player One*, the novel's hero, Wade Watts, is crippled by his physical world, but that all changes when he discovers OASIS, where his avatar is more important than the body he was born in (Cline, 2011). In *The Surrogates*, meanwhile, people, interacting through robotic avatars, can leave behind the burdensome, aging human form and choose instead to live in an obsolete reality. These avatars creatively speculate on identity and embodiment in a technologically saturated society (Venditti, 2006).

Autonomous features a woman named Jack who lives with chronic pain; the experience of her embodiment is a fundamental aspect of her character. She uses biohacking as a means of critiquing capitalist systems that profit from disabled bodies. These works seek to understand disability not as a barrier but as a source of resistance and innovation, reforming both societal and technological conventions (Newitz, 2017).

The cyborg body in the digital fiction may, however, be offered as a space for new autonomy and new kinds of agency. However, these representations also raise ethical questions around technology, control, and the effects of idealizing perfect

bodies in futuristic cultures. In *The Surrogates*, avatars lead to concerns of identity disintegration, spectatorial alienation, or perhaps even a dependence on technological evasion (Venditti, 2006).

C. Existing Research on Disability in Digital Spaces

The convergence of disability and digital media is increasingly an area of growth within the fields of disability studies and digital culture studies. The work of scholars like Simi Linton and Aimi Hamraie highlights how digital technologies support disabled people and provide tools to rethink their experiences of the body (Linton, 2015; Hamraie, 2017). Hamraie's investigation of crip technoscience highlights how disabled people adapt new uses for technology that disrupt normative models of autonomy and efficiency (Hamraie, 2017).

Digital platforms, especially gaming and virtual worlds, present new possibilities for representation. These design spaces enable disabled people to own an identity and articulate themselves in a way that captures their lived experiences, disrupting ableist assumptions of bodies and technology (Linton, 2015). Although gaming is now more inclusive through features such as reconfigurable controls and accessibility technology, more work is needed for disability to be more historically embraced in the gaming narrative and structure (Shaw, 2014).

While research on (in)accessible digital spaces and disability is expanding, for the most part, it locates disability within a frame of access, considering "people with disabilities and their access to the technologies of which non-disabled people can avail themselves" (Elcessor, 2016). This paper extends this research by examining how dystopian digital fictions, such as *Autonomous* and *The Surrogates*, work to realign narratives and provide alternate sites at which disability can be represented and valued (Newitz, 2017; Venditti, 2006).

III. THEORETICAL FRAMEWORK

The study is approached through multiple theoretical and overlapping lenses at the juncture of disability studies, technology, and identity. Central to this is Crip Theory, which challenges the traditional discourse of disability as lack, instead positioning it as an identity and a way of knowing and way of being in the world (McRuer, 2006). Cripistemology, a framework that is "defined as the body of knowledge, experiences, and ways of knowing emerging from the lived experiences and knowledges of disabled bodies," serves as the foundation for a theory that embraces alternative ways of knowing as it is embodied (Johnson & McRuer, 2014). Hamraie's (2017) concept of Crip Technoscience is also instructive in this respect: the idea of technology reuse by disabled people as a way of creating access, while also "making the technology do something else" offers a reconfiguration of agency. These frameworks are used to challenge the ableist representations of disability in the literature and film discussed above.

Moreover, the Medical Model of Disability, frequently critiqued for framing disability as a lack that requires fixing, is problematized by the techno-empowerment narratives of biohacking and cybernetics depicted in these texts (Shakespeare, 2006). The last of these critiques is of Neoliberal Biopower and Techno-Utopianism, which celebrate the "normal" body while ignoring the potential for disability as either resistance or innovation (Foucault, 2008). In combination, these theories form a strong foundation for exploring the representation of disability in digital and speculative realms.

IV. METHODOLOGY

This paper utilizes a close-reading, qualitative approach grounded in disability studies and literary analysis to investigate the representation of disability as knowledge in *Autonomous* by Annalee Newitz and *The Surrogates* by Robert Venditti. The methodological perspective is inspired by paradigms developed by various critical theories within disability studies, such as Crip Theory, Cripistemology, and Crip Technoscience, which critically question ableist discourses and provide alternative narratives about dis/abling as a place of empowerment and agency (Hamraie, 2017; Linton, 2015).

The main mode of analysis consists of close readings of selected large sections from both novels where disabled characters interact with technology. This reading is informed by the theoretical groundwork outlined above, as it is applied to understand instances in which disability is modeled not as a lack but as a form of knowledge and resistance. In *Autonomous*, the focus is on the way Jack appropriates biohacking to reconstruct her own identity, while *The Surrogates* acts as a criticism of the erasure of disability using cybernetic avatars (Newitz, 2017; Venditti, 2006).

In addition to comparing the two texts, the analysis explores representations of disability in different speculative narratives. This comparative gesture illuminates how both works undermine or support ableist expectations of technology and embodiment. The analysis draws upon transhumanism and digital culture studies and considers the implications of disability in technological and societal realms (Shaw, 2014; Bostrom, 2005).

Research Questions

The following research questions are addressed in this paper:

1. How do *Autonomous* and *The Surrogates* describe disability as embodied knowledge rather than a problem to solve?
2. How do these texts undermine the techno-ableist assumptions that are part and parcel of so many futuristic stories?
3. How can digital and gaming stories transcend tokenized representation and fully incorporate disability as a key metaphor for understanding technology and agency?

In engaging with these questions, this paper aims to argue for the potential of speculative fiction to resist ableist futures and imagine worlds where disability is not just present but also disruptively generative. Such texts serve both as forums for critical reflection and as alternative visions of what future technologies might be, informed by the experiences of disabled people. Disability is not a problem to be solved but a wellspring of innovation and resistance, providing alternative ways of thinking about the nexus between technology, embodiment, and justice (Newitz, 2017; Venditti, 2006; Kafer, 2013).

In examining *Autonomous* and *The Surrogates*, this paper employs a disability studies approach with close reading to explore how the fiction represents disabled characters and their engagement with technology. It also draws upon transhumanist and digital culture studies to consider disability's relation to discourses concerning technological progress, social change, and amelioration. By framing disability as a site of knowledge production and empowerment, creators and scholars can explore how digital and speculative media might transform our encounters with technology, shaping future worlds in ways that either enable or disable them (Newitz, 2017; Venditti, 2006; Bostrom, 2005).

Further, through a review of the secondary literature, this study also considers the representation of disability in digital media. Thinkers such as Simi Linton and Aimi Hamraie have written about how the internet can allow disabled people to take back their agency. This literature informs the theorization of the study and locates an analysis of disability in both *Autonomous* and *The Surrogates* (Linton, 2015; Hamraie, 2017).

Ultimately, the entire methodological approach seeks to reveal how speculative fiction functions as a medium of epistemic resistance, highlighting disability as knowledge, resistance, and transformation.

V. RESULTS

A. Analysis of *Autonomous* by Annalee Newitz

Autonomous (Newitz, 2017) is a mind-expanding futuristic science fiction title set in a future where biotechnology, biopiracy, and intellectual property (IP) converge in a dystopic capitalist landscape ruled by mega-pharmaceutical companies. Jack, the protagonist, is a disabled biohacker, someone who breaks through the control of corporate power. In a world where genetic engineering, body modification, and human enhancement are being embraced by the powers that be, Jack pursues a dangerous quest to help outpatients by undermining the persecutors of her clients, reprogramming her body in the process. As a biohacker, Jack carries not just unlicensed prescription meds but also alters her own body into a lab, loading it with chemicals and heavy-duty equipment.

At the core of the novel is the question of disability and the collective ownership over disabled bodies. For Jack, biohacking is about reclaiming control over her body and refusing to let social constraints define her. The novel examines how biohacking can be a form of empowerment and resistance, especially for people with disabilities. In the case of Jack, she alters her body to relieve chronic pain and empower herself; furthermore, she also challenges mainstream concepts of the human body and conventionally acceptable norms of embodiment.

Jack's modding transforms the novel into a conceptual exploration of the relationship between body, identity, and technology. In *Autonomous*, disability is not a problem to be resolved but a space of agency, invention, and self-actualization.

(a). Disability as Knowledge Through Biohacking

One of the primary focuses of *Autonomous* is redefining disability. Disability in traditional Western medicine is often framed as a flaw, a defect that can be fixed or healed. The medical model of disability is a conceptual model in which those living with such conditions are treated medically. Yet in *Autonomous*, Newitz pushes back against this reading of biohacking by staging it as an expression of what Hamraie and Fritsch (2019) call *crip technoscience*. Biohacking is portrayed as a form of resistance. A form of empowerment for people with disabilities to once again take charge of their bodies and modify and customize their bodies to their liking.

For Jack, the decision to biohack her own body is not about obliterating her disability, but rather, capitalizing on her body's limitations and turning them into strengths. Jack, as a disabled body, has always been the object of medical intervention meant to "fix" her body. However, she rejects such remedies and embraces the very condition her body is in, seeing it as right for her. Through this, she works to change the framing of disability as an epistemic source. In altering her body rather than "fixing" it, Jack reclaims her body as a locus of self-determined knowledge, where the very limits placed on her disability become a kind of embodied wisdom.

A key quote from Jack encapsulates this shift in thinking: "We don't fix bodies; we let them become what they need to be" (Newitz, 2017, p. 142).

This statement marks a radical shift in vision. Instead of striving to overcome the limitations of disability, Jack thinks of her modifications as a way for her to grow and move forward, better understanding her body and who she is. "Disability is reimagined as an identity and a long and complex process of becoming, rather than something to be fixed or overcome," as Johnson and McRuer (2014) state.

Jack's biohacking experience can be accounted for through a *cripistemological* frame (Johnson & McRuer, 2014), which suggests that disabled bodies produce different forms of knowledge. When Jack reflects, "I don't feel alone when I feel his body," it is because Jack's body is not the site of an absence but a site of new understandings and new ways of

being in the world (Newitz, 2017, p. 142). Embracing her deformed body and hacking and rewiring it, Jack subverts the hegemony of medical and scientific knowledge and creates a site of disabled agency and knowledge production.

(b). *Empowerment Through Self-Modification*

One of the amazing things about *Autonomous* is this notion that what Jack is doing is kind of, in some ways, biohacking, or at least close to that, and it's a kind of empowerment for Jack as well. For Jack, altering her body is an act of self-definition. In a world where people, particularly people with disabilities, have been so locked in by corporate and government interests, Jack's biohacking is a means of refusing to be controlled by all of that and allowing herself a certain space to have agency over her own body (Newitz, 2017). Unlike prevalent narratives that presuppose that disability must be corrected or remediated, Jack co-opts biohacking as a means toward self-empowerment and personal control over identity.

Jack can use biohacking to gain physical empowerment, which also leads to emotional and psychological empowerment. She takes drugs to dull the chronic pain racking her body and performance-enhancing drugs to enhance her overall physical achievement, moving into new heights of self-discipline and perfectionism while fleeing a society that sees her as disabled and therefore less than whole. By remaking her body on her terms, Jack can refuse the cultural dictate that disabled bodies must be patched and straightened out (Newitz, 2017).

The idea of empowerment/self-modification is a companion of, or an outgrowth of, the libertarian concept of radical autonomy. Jack's journey, both personal and physical, is about self-liberation. In altering her body, Jack makes the case that disability is not a fixed state but a mutable and malleable one. Her transformation is a revolutionary self-discipline no longer compliant with the socially accepted disabled body. She tells her body new stories instead and negotiates a new story for her body. This is complementary to agency, autonomy, and power.

In this way, what Jack decides to hack in *Autonomous* is a profound challenge to discourses that understand disability as a problem crying out for a solution. Jack doesn't try to mold her body to the ideal body, as is traditionally done; Jack fights the imperfection of her body and creates the new perfect version of herself through biohacking instead. Her changed body is something that gives her strength, not makes her feel weak (Newitz, 2017).

(c). *Subverting Dominant Ideologies: Disability, Autonomy, and Technology in Autonomous*

In *Autonomous*, Annalee Newitz meddles with the story to disrupt perceived ideas about disability, autonomy, and technology. Through the character of Jack and the world she inhabits through Brody and the creation of the novel, Newitz interrogates the "environmentations" that frame the othering of disability and the medicalization that accompanies such a positioning, an issue society has yet to. In doing so, she also calls into question the neoliberal notion of individuality and the techno-utopian longing for a standard of perfection offered through technology (Newitz, 2017). These criticisms are not only essential to how the novel's characters are shaped and the themes explored, but they are also an important social commentary that highlights how disability is viewed within today's society.

Table 1 shows a comparative analysis of how *Autonomous* reconceptualizes disability in relation to three dominant narratives: the medical model of disability, neoliberal autonomy, and techno-utopianism. Although these criticisms are tightly linked to major plot points and character development, they underscore the novel's demand for a more expansive and empowering conception of disability.

TABLE 1
SUBVERSION OF DOMINANT IDEOLOGIES IN THE NOVEL *AUTONOMOUS* THROUGH DISABILITY REPRESENTATION

No.	Ideology	Subversion in <i>Autonomous</i> (Through Characters, Plot, and Themes)
1	Medical Model of Disability	Reimagining Disability: Rather than treating disability as a problem to be solved, Newitz employs Jack's biohacking to destabilize the medicalization of the disabled body. Jack revels in her disability, remaking her body—not to fit in, but to overcome. "We don't repair bodies; we let them get what they need," Jack insists (Newitz, 2017, p. 142). This repositions disability from being a locus of "lack" towards one of self-defined strength and creativity.
2	Neoliberal Autonomy	Resistant to Capitalism: In the neoliberal world of <i>Autonomous</i> , where people like to think they should just work super hard and tune their bodies for success, Jack's a monkey wrench in that. With biohacking, she reconfigures empowerment as not individualistic self-optimization but as collective refusal to capitulate to capitalism's exploitation of disabled bodies. Newitz, in contrast, makes it a point when she frames biohacking as a form of resistance to the dictates of capitalism: "Jack's biohacking joining the left" (Newitz, 2017, p. 197).
3	Techno-Utopianism	Critique of Capitalist Techno-Solutions: <i>Autonomous</i> challenges the techno-utopian belief that technology, particularly biotechnology, is a neutral force for good. Newitz reveals it as a tool of capitalist control, where "perfect" health is a commodity and bodies are engineered for profit, not liberation. The novel argues that a system designed to create perfect, efficient humans is ultimately a system of oppression: "You can't design a perfect human. You can only design a human that's perfect for a particular system. And then you have to ask yourself, is that a system I want to be a part of?" (Newitz, 2017, p. 312).

Newitz's (2017) novel *Autonomous* presents a radical restructuring of disability that stands outside normalized medical procedures of "fixing" disabled bodies. The character Jack illustrates how biohacking can serve as a means of enabling individuals to construct lives on their terms. By accepting her body's limitations and redesigning it according to her standards, Jack demonstrates that disability is not a problem to be solved, nor merely a site of agency, but a space where knowledge is produced and where liberation from psychonormativity and negativity becomes possible.

Newitz also rejects the three dominant epistemologies they identify—medical, neoliberal, and techno-utopian—in favor of an alternative narrative of disability that centers self-representation, collective struggle, and alternative epistemologies. Annalee Newitz's *Autonomous*, in contrast, exemplifies Zakiya's challenge to standard theories of disability by imagining disability as a space of invention, resistance, and epistemic possibility. Rather than representing the disabled body as something to be cured or cleared from harm, Newitz imagines it as a location for self-motivated action and self-determination, where the disabled body can be imagined anew and where it can be reconfigured to suit the whims and necessities of individuals. The protagonist, Jack, alters her body through biohacking, making her an example of this resistance. She does not aspire to "fix" her disability; instead, she adapts to a body that makes her powerful: "We don't perfect bodies, we let them be what they want to become" (Newitz, 2017, p. 142). This constitutes a challenge to the "medical model," which historically perceives disability as something to be treated and cured. Instead, Jack's biohacking becomes an act of resistance to social norms, and disability becomes a state of superior personal power and understanding (Newitz, 2017).

Moreover, there is something here for everyone: for the general reader of the medical and capitalist systems that manage themselves, and more specifically for critical disability and medical scholars sympathetic to empirically grounded work in disability studies. Yet, *Autonomous* is more than just a critique of the medical and capitalist regimes that control the bodily; it is a rearticulation of disability as knowledge, as power. In biohacking a model of disability, the novel posits disability as an ever-evolving, liquid, and non-linear process. The changing body of Jack is not just a process of "healing," but also of self-assertion and refusal to conform to the normative ideals of perfection and the so-called average. This fluidity challenges the linear narratives of disability, which typically expect it to be a fixed and fixable state. As Newitz (2017) writes, "Disability is reimagined as an identity and a long and complex process of becoming, rather than something to be fixed or overcome" (p. 142). In doing so, the novel suggests that disability is, instead of a constraining deficiency, a locus of agency, one that can grow and mutate, allowing agents to reconfigure their bodies in ways that confound conventional constructs of "normalcy" and "wellness".

B. Analysis of *The Surrogates* by Robert Venditti

The Surrogates (Venditti, 2005) is a comics work that takes place in a world where surrogates replace the human body in everyday life, while humans in another society live without such surrogates. These surrogates effectively enable people to experience life through mechanized, humanoid puppets, which they can control and experience vicariously while sitting at home, safe and sound. In this world, human beings are no longer physically engaged with outside reality using their bodies; surrogate bodies are used to do everything, from working and socializing to all aspects of life.

Cybernetic surrogates are based on the idea that someone gets a "perfected" body that does not have the restrictions and corresponding vulnerabilities of a human body. As the novel states, "No more sickness. No more disability. Just perfect versions of ourselves" (Venditti, 2005). Thus, in theory, the surrogates can live forever; if not indestructible, then they are nearly so. Each surrogate exists as a perfect image of the human form, and all are immune to age, sickness, and disability. The book delves into the social aspect of that possibility, as well as the resulting psychological, moral, and philosophical outcomes of living as a form of digital self (Venditti, 2005).

The Surrogates illustrates an interesting view of disability that is slightly problematic. By opening up the possibility of replacing our actual, physical bodies with robotic surrogates, the novel suggests how disability is understood in a world where the body is no longer the central site of our encounters with the world. As a character observes, "No one has to be broken down anymore" (Venditti, 2005, p. 34). Disability is erased in this society; in the case of surrogates, disabled bodies have to be overcome, replaced, or discarded (Venditti, 2005).

The text grapples with this complicated relationship between disability and the body and asks whether technology is a form of empowerment for disability, willing into cyborg surrogates, or if it is a way to exploit and erase the messy, lived culture of the disabled in favor of an ideal, digital perfection (Venditti, 2005). This tension is captured in the contrasting views presented in the novel: while surrogates offer "freedom, no pain, no limits" (Venditti, 2005, p. 45), critics argue that "you can't heal a society by pretending its problems don't exist" (Venditti, 2005, p. 92). The economic dimension is also highlighted through the pointed remark that "Only the rich get to be perfect" (Venditti, 2005, p. 78), exposing how this technological "solution" creates new forms of inequality.

(a). *Disability and the Cybernetic Body*

The cybernetic body, which is not biological but mechanical, is one of the recurring motifs in *The Surrogates*. For disabled people, using surrogates is a gateway to freedom from the confines of their physical bodies. Surrogates are capable of mobility without physical limitations or restrictions and possess this constructed, idealized model of the human physique that society defines as "normal" or otherwise "acceptable".

One may think of using surrogates to empower oneself. The disabled characters in the tale can explore the world as if they had "normal" anatomy, functioning in society without the physical limitations of their disabilities. This would be a tremendous opportunity for many to experience life in a way that the typical human body, constrained by illness or injury, may not permit. In the virtual world, they can break their real-world chains and live as a perfected avatar. This is how the body of the future may work, reaching through the cyborgian calabash to pull out the chrysalis of liberation, at least for the disabled people: the chrysalis world that was always already there, behind, or inside, or beyond the blacklist and the black ghetto, where Black and disabled people are kept; if not together, in connection, then apart.

However, surrogate use is not without its problems. After all, “the emptying of the disabled body in favor of a cybernetic, idealized one can be seen as essential exploitation” (Venditti, 2005, p. 67). The societal rejection of the disabled body is evident, as society is effectively replacing the real-life disabled body with a robotic one, which sends the message that you’re not good enough as you are and that your body exists as second best to a “perfect” one. This raises the critical question: Whose disabled body are we talking about, and does utilizing surrogates not play into a larger dehumanization of disabled people by arguing that even their bodies aren’t sufficient?

It is in this context that the notion of cybernetic embodiment is more complicated than one of empowerment. It risks maneuvering the disabled body itself into something that must be fixed, removed, or transcended, rather than something that can be embraced or celebrated for its authenticity. These surrogates in the book come to represent the lack that, in the supposed real world, being disabled is to be “less than” and “incomplete,” and that the only way to be a productive member of society is to have a perfect, machine-produced avatar.

A relevant quote from the novel captures this tension: “In a world of surrogates, there is no such thing as disability” (Venditti, 2005). This quotation encapsulates the key concept of the book: in a world where people can no longer engage with the world through their bodies, disability is obliterated, and the concept of what it is to be a human is irrevocably changed. In a mean world of substitutes, the disabled body is treated as an obstruction to be conquered or overlooked, not something to be felt or even accepted. The erasure of disability in an idealized, cybernetic form calls into question the concept of humanity itself and dismisses the wide variation of lived experiences that disability represents (Venditti, 2005).

(b). Digital Spaces as Sites of Empowerment or Erasure

The novel questions whether the transfer of disabled bodies to cyborg avatars is a true form of empowerment or a form of disempowerment that negates the disabled perspective. At the heart of this tension is what digital worlds and digital bodies tell us about human potential and whether they provide any real solution to human limitation.

On the one hand, there is power in the use of surrogates. The idea of disabled people living in a perfect body (one that works as if physical impairments did not beleague the body) provides a different form of agency. Disabled individuals have access to a world from which they are usually excluded or to which they are usually only marginally connected because of their physical difference. The surrogate body permits the standard quality of life, meaning living without the physical limitations that a disability brings, and provides access to a society that may deem a disabled body as lacking.

On the other hand, this is a disempowerment since it erases the disabled identity. The ideal machine silences the real body and makes an avatar, in which we live the life of disability. Disability is no longer something to know, acknowledge, or embrace as a part of society; it has become something to conceal beneath an impenetrable exterior of perfection, lifeless as a machine. This digital proxy can also cause disabled people to feel detached if they have already been socialized to regard disability as a lack. While the substitute body makes life more ideal, entering it also potentially further severs individuals from their bodies, leaving them in digitized surroundings that strip their physical lives and their online avatars apart from one another.

The perfect body that surrogates offer society is without disability or authenticity. It is a body that is not being lived; it is a body that exists not for itself, but simply to project a (nonexistent) ideal of perfection onto the world. The more one uses surrogates, the further away from our humanity one is and the less one can understand, for instance, what it is to live in a disabled person’s experience.

(c). Critique of Idealized Bodies

The Surrogates is critical of a culture that has chosen to eliminate disability by making the perfect digital body the measure of value and being. The novel undermines the concept of “human” by depicting the surrogate body as the ideal, flawless form of the human body. The book’s advertised body appears to reject the limitations and imperfections of the human, natural body, creating a society whereby the ideal becomes the imperative.

The issue with this perspective is that it requires people to measure up to an ideal of perfection that does not exist. For disabled individuals, that standard is a daily reminder that their bodies are not “normal” but are instead broken or missing something. The surrogacy of the body is raised to the level of an oppressive ideal, imposing on people the choice between embracing a digital self and remaining outside or on the margins.

The society in *The Surrogates* reflects the fundamental ableism of our world, where disabled people are frequently not able to participate in mainstream life fully, not because of their abilities, but because of how culture perceives the imperfections in their bodies. In replacing disability with an ideal digital body, the novel critiques the exact societal impulse to erase or disregard the writing of a disabled experience on a body, distilling it to a set of attributes that must be perfected to be tolerated.

The Surrogates by Robert Venditti presents a dystopian view of the future where the idealized, cybernetic body replaces the human form, and disability is erased using surrogates. While the novel suggests that the use of cybernetic surrogates may offer a form of empowerment for disabled individuals by allowing them to experience life without the limitations imposed by their bodies, it also critiques the erasure of disability as a form of exploitation. In a world where the disabled body is replaced with a perfect digital version, the novel asks difficult questions about identity, authenticity, and empowerment.

Ultimately, *The Surrogates* critiques a society that seeks to eliminate disability by presenting the cybernetic body as ideal, free of the imperfections and limitations of the real world. While the use of surrogates offers a means of escape

from physical disability, it also raises ethical questions about the value of the disabled body and what it means to truly empower individuals without erasing their lived experiences. The novel forces readers to reflect on the role of technology in shaping society's views on disability and the implications of creating a world where perfected avatars are the standard.

C. Disability and Digital Worlds as Sites of Knowledge

(a). Digital Avatars and Identity Construction

The integration of digital avatars and cybernetic bodies in speculative narratives offers powerful tools for identity construction. These avatars allow characters to transcend the physical limitations of their bodies and adopt new identities, enabling them to engage with the world in ways that are not possible in their physical form. In works like *Autonomous* by Annalee Newitz and *The Surrogates* by Robert Venditti, these digital or cybernetic identities become not just a means of physical interaction but a method for personal reinvention and the construction of new, alternative identities (Newitz, 2017; Venditti, 2005).

In these works, digital avatars and cybernetic bodies are representations that allow characters to remake themselves, shedding the limitations imposed by their real-world bodies. For disabled characters, the digital realm offers an opportunity to escape the confines of their physical disabilities. By utilizing avatars, characters can engage with the world in ways that are not possible for their physical bodies. These digital surrogates or avatars are seen as idealized representations—perfected versions of their users that are free from physical impairments. As a result, the avatars often serve as powerful tools for identity construction, providing individuals with the opportunity to redefine themselves and their interactions with the world (Newitz, 2017; Venditti, 2005).

In *The Surrogates*, the cybernetic bodies used by individuals are seen as a means to perfectly embody a new self, one that is liberated from the limitations of disability, aging, or physical trauma. The characters control these avatars remotely, and through their avatars, they can experience the world as idealized versions of themselves. The process of engaging in this idealized identity construction is a form of empowerment—a way to inhabit a body that is free from imperfections (Venditti, 2005).

Similarly, in *Autonomous*, the protagonist Jack chooses to modify her body using biohacking as a way to reshape her identity. Though not exactly avatars in the traditional sense, Jack's modified body becomes a tool for self-transformation and self-representation. The digital or cybernetic possibilities in these worlds allow characters to become versions of themselves that reflect their desires, needs, and aspirations rather than the limitations imposed by their natural, biological forms (Newitz, 2017).

For disabled individuals in these narratives, digital avatars represent more than just technological advancements. They provide a way of escaping societal limitations placed on disabled bodies, offering characters the ability to construct an identity that is not defined by physical impairments. These avatars become extensions of the self that offer an opportunity for greater agency and empowerment, allowing characters to move beyond the constraints of their physical bodies and enter a new realm of possibilities (Newitz, 2017; Venditti, 2005).

(b). Virtual Spaces as Epistemic Resistance

Digital worlds in *Autonomous* and *The Surrogates* are, beyond being a tool for identity performance, also epistemic spaces of resistance. In such digital spheres, characters can reassert their agency, resist stereotypical social constructions of disability, and construct the disabled body not as something to be cured or driven out. Instead, in these digital realms, characters refuse the conventional modes of knowing and being that have been used throughout history to marginalize and obliterate their experiences, and they create alternative modes of being and knowing in the world (Newitz, 2017; Venditti, 2005).

The notion of epistemic resistance in these texts emphasizes that knowledge is not a universally applicable entity. Society's prevailing epistemologies tend to regard disability as a deficit, concentrating on the constraints of the body, disability's physical limitations, and functional impairments. Yet, the digital and cyborged spaces offer a counter-resistance where characters can build their systems of knowledge based on another time, ones that disavow normative conceptions of able-bodiedness. In this context, characters actively renegotiate their identity and produce alternative forms of knowledge that transcend traditional representations of medical and social perspectives on disability (Newitz, 2017; Venditti, 2005).

Cybernetic avatars in *The Surrogates* facilitate a world where disability can become invisible, and disability categories are reformed. Characters employ avatars to present themselves in a manner that transcends classic conceptions of the body. They can have experiences in life without the restricted encumbrances of their natural forms. These new avatars are generators of epistemic freedom: they are no longer subjected to features of the body; they are the embodiment of and for epistemic possibility, as they represent the avatar's epistemological possibility (Venditti, 2005).

Likewise, in *Autonomous*, Jack's biohacking works as epistemic resistance as well. By electing to alter her body on her terms, Jack is defying what she calls the medical model, one that tries to "fix" or "normalize" disability. Her interventions aren't about "erasing" her disability but about shifting the category of that disability, about transforming her body into something that more clearly mirrors her wishes and needs. In so doing, she is rejecting the prevailing epistemologies that construct disability as a deficiency and composing her knowledge grounded in experience, lived bodily, and self-determination (Newitz, 2017).

The virtual worlds in both novels create a space for challenging cultural expectations/status quos that want to remove or conceal disabilities. They provide characters with a space to rewrite the disability narratives and to participate in the production of alternatives to knowledge regarding disability. What these spaces do is to act as knowledge sanctuaries in which characters can refuse to affirm their epistemic bubbles and, in turn, construct a knowledge that is contingent upon their self-representation and their agency (Newitz, 2017; Venditti, 2005).

A related quote that addresses how digital or cybernetic bodies allow characters to fashion different kinds of self-knowledge or alternate identities can be found in *Autonomous* and *The Surrogates*. One critical example is *The Surrogates*, which strongly links the concept of a digital doppelganger to the elimination of disability: "In a world of surrogates, there is no such thing as disability" (Venditti, 2005).

This quote encapsulates the book's big idea, where everyone "meets" using digital avatars and where disability is no longer a disability. It's cancelled out by the supplanter body; that's like the ideal copy of the self. Though this enables space for empowerment, it also suggests that non-disability in the digital world may deny an individual the ability to be their lived embodiment.

In *Autonomous*, Jack's journey of transformation via biohacking provides another reframing of disability. She doesn't live in a digital avatar in the same way, but her physical updates allow her to overcome her body and assume a new identity that defies conventional ideas about what it means to be disabled. The decision to change her body and to affirm her disabled identity as something to be rearticulated as opposed to corrected is an act of epistemic resistance.

"We don't fix bodies; we let them become what they need to be" (Newitz, 2017, p. 142).

This quote is emblematic of Jack's philosophy on disability and self-awareness. By transforming her body, she renegotiates her identity and designs new ways of knowing herself that do not hinge on the constraints imposed by conventional notions of disability. In a way, Jack's path down the rabbit hole of biohacking is an exercise in agency and a challenge to society's version of normal.

(c). *Disability as a Source of New Agency*

In both *The Surrogates* and *Autonomous*, disability is reframed as an opportunity for new agency, rather than a barrier to be surpassed. It is in these stories' digital avatars and cybernetic bodies, and how characters use technology to circumvent the physical confines of disability and interact with the world around them in innovative ways, that the true potential of the genre emerges. No longer confined to the margins of society, in these digital worlds, people with disabilities can reclaim their bodies and recreate themselves in the image of who they would like to be, need to be, and want to be (Newitz, 2017; Venditti, 2005).

In these stories, disability isn't something to be cured or erased but an unlikely source of innovation and empowerment. Characters with disabilities can invent alternate bodies that change the way they interact with the world, unencumbered by the limitations their actual physical bodies may impose. In the process of self-fashioning, they provide a powerful challenge to ableism and to socially entrenched assumptions concerning the deficiencies of disability. Rather, they suggest, disability can serve as an epistemic site for creating knowledge and enabling people to remake themselves and the world they inhabit (Newitz, 2017; Venditti, 2005).

(d). *Digital Avatars and Cybernetic Bodies in The Surrogates and Autonomous*

In such digital worlds, characters can transcend the limits of their physical bodies and forge emancipatory new modes of self-knowledge outside the norms of able-bodiedness. In digital or cybernetic bodies, characters can reclaim their identities and, in the process, redefine their concept of disability as a force or tool that they hold and are in full control of (Newitz, 2017; Venditti, 2005).

In these stories, disability emerges as a site of resistance to prevailing social and medical constructions of what it means to be human. By refusing the fantasy body of able-bodiedness, the characters of these works open up new possibilities for how disabled people may interact with the world and imagine a more inclusive future. In this way, the online world provides a site where characters subvert the master narratives about disability and emerge as subjects in a different epistemology grounded in self-definition, truth-telling, and empowerment (Newitz, 2017; Venditti, 2005).

VI. CONCLUSION

In examining *Autonomous* by Annalee Newitz and *The Surrogates* by Robert Venditti, both texts argue that they portray disability as knowledge and thus resist normative medical and cultural ways of knowing disability as a lack. These works depict disability as a generator of power, of alternative knowledge, enabling us to imagine the digital or cyborg enhancement of humans as crossing physical humanity limits and changing the way we view disabilities (Newitz, 2017; Venditti, 2005).

In *Autonomous*, the hero Jack reconstructs her body through biohacking to control and reconfigure it, rather than to eliminate disability. Instead, she makes it an anchor of self-fulfillment and self-liberation. The novel challenges the medical view on disability, under which disabled bodies need to "be repaired" or "become normalized," creating a new epistemological location where disability is a platform for innovation and knowledge empowerment. In Jack's narrative, disability becomes an individual and political act, enabling her to craft her own identity and to negotiate her place in the world on her terms (Newitz, 2017).

The Surrogates presents a similar concept in which the surrogates are idealized avatars that allow people, diabetic and crippled, to interact with the world without the limits of their bodies. These avatars, on the one hand, empower individuals to live life as an ultra-perfect version of themselves but also make comments on the societal trend to delete disability in favor of a perfect digital form. In this universe, the disabled body is not celebrated but conquered by the idealized complement of machine-man (Venditti, 2005).

They both make the point that digital and cybernetic bodies are mechanisms for forming identity; they can convey new ways for the disabled to be in the world. These avatars and augmentations provide a way of reclaiming identity while choosing not to reconcile with the mainstream ableist narratives that generally frame disability as a “lack.” Instead, these technologies allow for the development of other forms of knowledge, in which disability becomes not the limit but a site of empowerment and agency (Newitz, 2017; Venditti, 2005).

A. Implications for Disability Studies

The depiction of disability in digital and cybernetic fiction, including *Autonomous* and *The Surrogates*, provides valuable sources of knowledge for imagining disability other than through an old medical or social model of disability. These works suggest that the focus on disability as something to be cured should be replaced with an understanding that disability is an inseparable part of embodied knowledge, which can open up ways of knowing and valuing the world. In framing disability as a site of empowerment, both texts push back against ableism that generally marginalizes disabled people from dominant stories and representations (Newitz, 2017; Venditti, 2005).

In the non-digital world, too, these stories can influence perceptions of disability. By providing characters with disabilities who communicate and interact with the world through cybernetic bodies or digital avatars, these stories encourage the idea that disability is not in itself a limitation but rather a valid basis for ingenuity. It can result in a more inclusive society in which disability is not viewed as a barrier to success or participation but rather is understood as a dimension of human diversity that adds to the diversity of living (Newitz, 2017; Venditti, 2005).

Within disability studies, such stories invite scholars and activists to think anew about representations of disability in digital media and popular culture. Instead, they point out the need to redefine disability as a non-static, changing, and ever-adapting knowledge that can open up new ways of knowing and learning (Newitz, 2017; Venditti, 2005).

B. Future Research Directions

This accumulation of digital disabilities and disability representations merits further investigation. Now, with emerging technology such as Virtual and Augmented Reality (VR/AR) and Artificial Intelligence (AI), there is an increasingly growing need for work that can contribute to understanding how they can better represent disability in a more empowering and inclusive way. Possible future studies could follow on:

Virtual Reality (VR) and Disability Representation: Exploring the potential use of VR in generating empathy and emotional connections with disabled users through exposing them to digital environments representative of their identity and experiences. This research might analyze the potential use of VR as a tool for self-empowering identity construction in much the same way that avatars and cyber bodies do in speculative summaries.

The Application of Augmented Reality and Accessibility: Exploring the usage of VR in everyday life and how disabled people benefit from this concept. It would be interesting to investigate how one could use AR to augment communication and mobility for people with disabilities, providing them new ways of experiencing the world in real time.

AI for Inclusion and Disability: Addressing how AI can be used to drive broader disability inclusion and foster greater accessibility for people with disabilities in several areas, such as work, home, and public. One area of investigation might explore how AI can be used to dismantle the impediments to social participation that people with disabilities commonly encounter by developing personalized means of communication, getting around, or interacting.

Digital Storytelling and Disability Identity: Future research might examine digital storytelling in games, cinema, and interactive media as a venue for the resituation (Gregor and Suigin) of disability and value the development of more realistic accounts of disabled lives. For example, research into networked media should consider how these types of media can disrupt stereotypes while portraying inclusive narratives that reflect disability as part of the human condition.

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The Quest for Immortality and Identity in Contemporary Iraqi Poetry: Insight From the Epic of Gilgamesh

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Abstract—This research examines the Gilgamesh epic in contemporary Iraqi poetry by the diaspora of poets, including Fadl Khalaf Jaber, Karim Shaalan, Hassan Al-Nassar and Zaher Al-Jizani. The epic is an important source, enriching people's memory with diverse values. The relationship of art to the epic is not modern but ancient. How many epics have been a source of inspiration for poets, and how many poetic works are new formulations of an ancient epic that has crossed time, with its value and importance to people preserved. The epic is not just a primitive product but an essential and fundamental factor in human life in every era and within the framework of the most advanced civilisations. Within the framework of this civilisation, the epic is perhaps more effective and active than in past eras. Poetry has never been closer to the spirit of the epic than in the contemporary era.

Index Terms—Gilgamesh, Babylon, Modern Iraqi Poetry, Contemporary Iraqi Poetry, Epic

I. INTRODUCTION

In history, the Epic of Gilgamesh rises as an immortal icon, illuminating human thought and inspiring the passion of poets and writers (Carey, 2020). This timeless Mesopotamian epic, which embodies human values and history, is a source of inspiration for expatriate Iraqi poets who seek the immortality of the soul of Iraq (Abusch, 2001). This research relies on several sources: Sumerian mythological texts (e.g., Epic of Gilgamesh) and collections from poets, literary and critical books, and other sources (Kovacs, 1989). This research assesses the influence of the Epic of Gilgamesh on contemporary Iraqi poetry abroad and how Iraqi poets have drawn inspiration from this timeless epic to embody their concerns and aspirations in exile. This work explores the poems of prominent Iraqi poets, including Fadl Khalaf Jaber, Karim Shaalan, Hassan Al-Nassar and Zaher Al-Jizani.

II. DISCUSSION

The setting of the epic is one of a heroic national past, a world of 'beginnings' and 'peaks' in national history, of fathers and 'grandfathers,' and of 'firsts' and 'righteous ancestors' (Bakhtin, 1982). The word epic is of Greek origin, meaning a speech or story. In Arabic, the dictionary form also means the same for epic, but its plural indicates a catastrophe. In literature, this word indicates a narrative poem with multiple hymns, narrating heroic incidents and describing incredible heroics, whose heroes are superior humans and gods. The epic relies on elements of astonishment, supernatural power and imagination and discusses people in terms of historical events, such as wars.

Epic poetry has appeared among many people since the dawn of the first civilisations, but this advanced form of Greek poetry is close to artistic perfection in this early era. However, recent excavations in Mesopotamia (Iraq) have revealed that the Babylonian and Akkadian epics were earlier than the Greek epics, dating to 2300–2100 BCE (Jager, 2001). Thus, Babylonian epics are the oldest written literary works in the world, and among them is the Epic of Gilgamesh (Sales Araújo, 2024), which preceded the Epic of Meros by 1500 years.

A critical matter is what distinguishes the epic from other forms of expression, especially from myth. The texts that have been classified as epics since the days of Homer have several standard features. The epic text shares a human story, whose primary heroes are human, whose concerns and goals are worldly, and whose gods only form the background of the event. Epics revolve around noble figures, recounting their exploits and heroic deeds. The epic weaves several ancient

texts passed down orally or in writing over a prolonged period, creating a cohesive narrative without a precise author. The events in the epic occur in a specific period dating back to the dawn of the people's history and the beginnings of the formation of their culture, a period known as the Age of Heroism. The story likely occurs in a specific location, the people's first cultural centre, from which they set out to create an extensive culture or a far-reaching empire. An epic may contain numerous mythological elements or references to well-known myths. However, such elements and references are not intended for their own sake but serve the epic's events and clarify its purpose. Thus, the Babylonian Epic of Gilgamesh is an epic text in the modern, technical sense (Firas Al-Sawah, 1987).

Therefore, Iraqi poets in the modern and contemporary era have relied heavily on the epic, especially the Epic of Gilgamesh, because it is considered one of the oldest types of heroic features in the history of all civilisations (Abusch, 2001). Moreover, this epic is the longest and most complete known to Near East civilisations. Modern researchers and literary historians have placed it among the pinnacles of world literature (Sonik, 2021). No literary work from the literature of ancient civilisations before the Greeks is comparable to the Epic of Gilgamesh, which stands as the 'Odyssey' of ancient Iraq. This epic was written 4,000 years ago, and its events date back to other, more distant crises (Pruyser & Luke, 1982).

Like famous world literature, the Epic of Gilgamesh remains immortal, with general human appeal in all times and places, because the problems it addresses still occupy the minds of people and affect their emotional and intellectual lives, making its situations and events captivating. This epic addresses a major ethical problem that has occupied people since ancient times. If death is inevitable and humans cannot attain eternal life, whether by overcoming death or by life after death, these major problems constitute the basic idea of the epic. Solutions that are consistent with the patterns of religious beliefs and social conditions prevailing in civilised society four thousand years ago have been found by embracing this life, exploiting it to the limits of individual exploitation, and performing deeds that immortalise the individual. Their motto is 'remembrance is a second life for man' (Damrosch, 2007). In addition to these major human problems, the Epic of Gilgamesh is full of wonderful images of sensitive, eternal human topics (Damrosch, 2007), such as friendship, war, hatred, hope, nostalgia, heroism, adventure and mourning.

Moreover, the epic is of immense importance in its compelling portrayal of critical aspects of the civilisation of Mesopotamia. For students of that civilisation, this epic is a rich source of essential aspects and components of the conditions of ancient Iraq. In this epic, students can learn about the ancient people's religious beliefs, opinions and ideas regarding life and the universe. Moreover, readers can discover the social conditions, exciting aspects of their emotional and mental lives, social relationships and the structure of the oldest civilised society in the history of human civilisation (Baqir, 1980). An excellent illustration of the Bedouin culture adjacent to the civilisation of Mesopotamia is provided, detailing the virtues of this culture and how it progressed to civilisation (Baqir, 1980).

The epic was written in a poetic style, distributed across 12 clay tablets inscribed on both sides, each containing a significant event from the epic. Each tablet is divided into six columns, read from left to right and top to bottom, with each event often beginning in the column at the end of another event. The events of the epic come to their complete and natural conclusion with the end of the eleventh tablet, where Gilgamesh returns to Uruk after his long journey in search of immortal life. The eleventh tablet concludes as the first tablet began, with a description of the city, its wall, and its temple, indicating the end of the epic (Firas Al-Sawah, 1987).

A. *The Epic of Gilgamesh in a Poem by Fadl Khalaf Jaber*

The poets of the diaspora, including Fadl Khalaf Jaber, have invoked the legend of Gilgamesh, as stated in the poem (The Temptation of the Desirer; Jaber, 2011):

" في جوفها من أباريق الجنة وأقواب الخلود أي جلجامش
يا أباتا
الذي مات من شدة خلوده في سلاسل البرق أي
جلجامش يا
جلجامش كيف نناديك نحن أيتام التاريخ وعجز
المنافي "

In its interior are the pitchers of Paradise and the cups of eternity. That is, our father, Gilgamesh, died from the intensity of his eternity in the lineages of lightning. That is, Gilgamesh, O Gilgamesh, how do we, the orphans of history and the gypsies of exile, call upon you?

Gilgamesh is the hero of the epic that bears his name. The story indicates that Gilgamesh was a legendary hero and ruler who learned all the universe's secrets and returned with the news of his journey. He walked a difficult path and wrote all of his deeds on a stone tablet (Courtell, 2010). The story says that the spectre of death haunted Gilgamesh, especially after the killing of his friend Enkidu, which led to his profound sadness because he knew the meaning of annihilation and death. After several adventures, he obtained the plant of immortality. However, on his way back to the city of Ur, drowsiness overcame Gilgamesh near a watering hole. There, a snake smelled the sweet scent of the plant, stealing and swallowing it. Then, the snake gained the power to shed its skin.

The secret of the immortality of this legendary character is the same as that of every resistor and rebel against injustice and oppression. Even if the hero physically dies, the epic character does not die in eternal history. This symbolism constantly allows the creators to draw the energy of immortality and the struggle for it. Victory does not come through confrontation to achieve a goal, no matter the cost. As a legendary epic symbol, Gilgamesh is paralleled by the symbol

of the serpent that stole the herb of life. The serpent represents the tendency of betrayal in the poem, and Gilgamesh represents the tendency to confront and resist this betrayal as the epic knight. During the struggle to achieve a specific goal, there is a dark side other than the real enemy, a side that betrays him, symbolised by the snake. Despite our past full of the symbolisation of Gilgamesh with his resistance and the serpent's treachery, we do not learn a lesson. The poet addresses Gilgamesh, saying:

" فهل تسمعنا ونحن نُجَنُّ لشدة ما يعتصرنا العصر تهدمت أوروك ثانية "

Do you hear us as we go mad with the severity of the times that are squeezing us? Uruk has been destroyed again.

The poet links what happened to Gilgamesh and the city of Ur with what is happening in Iraq. Uruk was destroyed again, and they stole the crown and sceptre. The poet laments Gilgamesh, saying, 'We did not learn from your experience and the snake's treachery towards him, despite his writing down his commandments to us on a clay tablet'. The poet apologises to Gilgamesh, stating that they even stole his commandments:

" ودخل على أمك في قبولتها أقوام لا يشبهون الآدميين "

يا جلجامش

وسرقوا من تحت وصادتها وصاياك التي دونتها على رُقم طين

عجيبته ببديك من ضفاف الفرات وقلت لنا هذه

وصاياي فياكم

والغفلة ساعة تُجَنُّ الوحوش وقلت احذروا كيد

الثعالب وغدر

الضباع ولا تأمنوا الحية وخذوها عبرة من أبيكم "

And people who did not resemble humans entered upon your mother during her nap, O Gilgamesh, and stole under her pillow your commandments, which you had written on clay tablets, which you had kneaded with your hands from the banks of the Euphrates. You told us, 'These are my commandments, so beware of heedlessness, for it is a time when wild beasts go mad', and you said, 'Beware the cunning of foxes and the treachery of hyenas, do not trust the snake, take it as a lesson from your father'.

B. The Epic of Gilgamesh in a Poem by Karim Shaalan

Karim Shaalan takes inspiration from the herb of life that Gilgamesh obtained, similar to the life that Karim lives, but with the paradox that he begins from the threshold of the text (the herb of submission). This paradox shocks the reader, continuing to the poem to explain the paradox of the title, stating (Submissive Herb; Shaalan, 2015):

" سأعبرُ النهر نصف عمر "

وأهمس: انتصرت

وأعزفت عن الأمنيات الصغيرة

لسبب مخجل

وأبقى جامداً متوقفاً جذار الحكايا

وبيدي حافيتين ورأس فارغ

أبداً ينسج كونكريت جثتي "

I crossed the river half a lifetime ago

And whisper: I won

And refrain from small wishes

For a shameful reason

And remain frozen, twinned against the wall of stories

And with bare hands and an empty head

I begin to weave the concrete of my corpse

The poet's departure from Iraq was terrifying amidst the harassment of the ruling regime. By leaving, he escaped death, as he achieved immortality. However, he was generous and expected comfort in a country that guaranteed him freedom and comfort, far from the fear of death and threats. However, the paradox is that his immortality was the opposite of what he wanted. Gilgamesh's immortality was one of power and strength, whereas the poet's was one of humiliation and submission, as he was merely a statue. He said the following:

" (أنا تمثال) "

أقولها دون حياءٍ أو مغص

أخرج مع الشمس

كدابة ضائعة

من مذلة التوسل لطبيعة لا أراها

أسميها الكسل وأبدو خائفاً

ويسمونها الحياة

وينصف خب ونصف جدوى

أتوق للتلذذ من سماء (يسينين)

(أنا تمثال)

أقولها دون عودة لأحد

فأنا أول في السرب

وأراني آخرهم أيضا
 أو أنام على وخز الاسئلة
 وفي الصباح أمحوها جميعا
 وأواجه العشب والخلود
 بخنوع جميل
 (I am a statue)
 I say it without shame or colic
 I go out with the sun
 A lost liar
 From the humiliation of pleading to a nature I do not see
 I call it laziness and appear submissive
 And they call it life
 And with half love and half futility
 I long to hang from the sky (Yesenin)
 (I am a statue)
 I say it without returning to anyone
 For I am the first in the flock
 And I see myself as the last of them, too
 Or I sleep on the prick of questions
 And in the morning, I erase them all
 And I face the grass and eternity
 With beautiful humility (Shaalán, 2015)

He twice repeats, I am a statue, for life is far from friends, family, and homeland, in a picturesque nature without a soul, for he has no love and does not thirst for water or want food. He writes poems no one hears, in a skull teeming with questions. What kind of immortality is this? He is a submissive herb. The poet excels at summoning the legend of Gilgamesh and depicting this immortality.

The influence of Western culture on the poet is apparent, as he mentions and compares himself to the poet Yesenin, who died without achieving anything of his own free will, committing suicide in the prime of his youth, at half his life, when he emigrated from his country. Yesenin was a sensitive and religious poet who faced much oppression because of his religiousness during the Bolshevik Revolution. His end was tragic, as he committed suicide when he was at the height of his youth and creativity. He had much to offer his people through his poems. His poems emanated from the depths of Russia and expressed the aspirations of the simple Russian citizen. The arduous search for lofty ideals and supreme values distinguished his literature, which is characterised by spontaneity, honesty, and simplicity (Abu Lui, 2014).

C. Gilgamesh Epic and the Babylonian Epics of Other Diaspora Poets

When Issa Hassan Al-Yasiri suffered from the ruling regime, the poet blamed Utnapishtim, a legendary character mentioned in the Epic of Gilgamesh. Utnapishtim and the hero's name in the original Sumerian (Ziusudra) mean 'he who made life long'. After the gods met and decided to destroy the human race, the god Enki commissioned the hero to build a giant ship called the 'preserver of life' in preparation for a massive flood that would wipe out all forms of life. After a hidden communication, he informed the hero of the gods' decision to destroy the Earth by flood. Enki advised him to build a ship that would save him, his family and those he loved. Afterwards, Ziusudra knelt before the gods An and Enlil, who rewarded him and gave him eternal life (i.e., immortality) in exchange for his efforts to save the human race (Maadi, 2012).

The poet repeats weep twice to emphasise the pain accompanied by the poet's feeling of inner tension by summoning the point of tension (Utnapishtim). His sons, whom he saved from the flood, are like snakes, conveying treachery, ruin and destruction, as they plotted against him, tortured him, and took him far from his race, as he said in his poem (Snake; Al-Yasiri, 2021).

"إِ بِكَ يَا أَتُونَا بِشْتَم..إِ بِكَ
 يَامَنْ حَمَلْتَ سَفِينَتَكَ نَنَايَا مَقْتَرَسَةً وَيَابْنَاءِ الْأَفْعَى
 مِنْ حَمَلْتَهُمْ فِي سَفِينَتِكَ يَا أَتُونَا بِشْتَم
 هُمْ مِنْ يَحْتَقِلُونَ الْأَغْنِيَةَ"

Weep, O Atona, with curses... weep! You who loaded your ship with ferocious wolves and sons of the snake!
 Those you carried on your ship, O Atona, with curses! They are the ones who imprison the song!

Zaher Al-Jizani began writing his poem using the scattered line movement method, and the interpretation that 'this movement gives us a state of distraction and imbalance, which makes the writer absent-minded and move in the writing process involuntarily' (Al-Hassani, 2015). The lines in the poem begin with dispersion and the search for a saviour for all that is beautiful. The poet invokes the myth of the god Enlil, the god of wind, air, and emotions, in which the god of the sky (An) married the god of the Earth (Ki), separating the sky from the Earth and birthing Enlil, the lord of the air and the mountain of the wind. Enlil had a great position among the gods of Sumer (Maadi, 2012), making the Earth a suitable home for humans to live on in the Sumerian flood myth. Enlil rewards King Ziusudra with immortality because the latter saved the people of the Earth by building a ship. Out of his deep love for his country, the poet wishes to be Enlil to

preserve everything beautiful in his homeland, the beautiful mornings and history. He depicts what is happening to his country from the loss of writings and history to the horrors, death and theft of treasures that befell his people. This situation seems to make the poet so astonished and distracted that he chose to write in this way, as he states in his poem (I Tie My Boat to a Burning Trunk and Wade Through the Waters; Al-Jizani, 1998):

" أنا الليل / أنا إنليل / ياليل
يا إنليل يارب العلامة المقهورة
في أسفل بيوتنا
إنليل يا رب الليل
احفظ بكاءنا على أبينا
احفظ الطريق من البيت الى السوق
إنليل يا شاي صباحنا
يا قهقهة نساننا
احفظ قبر أبي
من الجرافات
النهار مرتبك في غطائه
المؤلفات تسقط كالذبابح
التاريخ مزرعة لتربية
هذا صياح ميديا
أم صباحنا؟
هذه رائحة الأثم
أم رجائنا؟
أهذه صورتي الصورة الأصلية
فيها رأسي مقطوع
وذهبي مأكول "
*I am the night. / I am Enlil / O night
O Enlil, lord of the subdued sign
At the foot of our houses
Enlil, lord of the night
Save our weeping for our father
Save the road from home to the market
Enlil, our morning tea
Oh, our women's laughter
Save my father's grave
From the bulldozers
The day is confused in its cover
The compositions fall like sacrifices
History is a breeding farm
Is this the cry of Medea
Or our cry?
Is this the smell of sin
Or our hope?
Is this my image, the original image?
In it my head is cut off
And my gold is eaten*

The poem by Hassan Al-Nassar is written as if he is addressing one of the gods of Mesopotamia (e.g., Enlil), stating that Babylon, with its loftiness and height, was appreciated in all parts of the world, but the rulers destroyed it and did not know its position, as he wrote (Al-Nassar, 2021):

" هل تسمعون يا إنليل؟
بابل التي رفعت رقبته الطويلة
..منذ سبعة آلاف سنة
رقبته الطويلة مثل دجلة والفرات
..مثل ملوية سامراء
الشامخة كالجنائن المعلقة والجواهري
..والبياتي والسياب
بابل التي كسروا أجراسها
..نصبت لها ملايين النواقيس على سواحل العالم "
*Do you hear, Enlil?
Babylon, which raised its long neck
Seven thousand years ago
Its long neck is like the Tigris and Euphrates*

*Like the spiral of Samarra
 Luxurious like the hanging gardens and al-Jawahiri
 and al-Bayati and al-Sayyab
 Babylon, whose bells they broke
 Millions of bells were set up for it on the shores of the world*

III. CONCLUSION

The *Epic of Gilgamesh* is one of the greatest global myths of Mesopotamia, with intellectual, moral, aesthetic and artistic value and importance, based on the true immortality of humans. This epic was the first expression of the true awareness of human existence and destiny. Further, this epic represented the first known departure from the norm and a break from the laws governing ancient nations embodied in previous myths and epics, where humans did not have a real existence or an entity aware of their destiny, but were merely secondary, subject to the gods' will. It is not the first time that this restriction in the minds and consciences of people has been broken through the *Epic of Gilgamesh*, whose heroes were ordinary people and not gods. The epic changed the inevitable human destiny of death and annihilation, revealing that immortality is only achieved by knowing its secret, represented by the permanence of human performance of good deeds achieved in this worldly life, so that fame remains immortal, passing from generation to generation. Gilgamesh is remembered through his fame because his concerns and aspirations are the concerns and aspirations of the readers.

The *Epic of Gilgamesh* is one of the greatest, most important treasures that has been translated into numerous languages globally. This epic has a prominent place in most of the world's respected libraries, with specialists studying the antiquities of ancient nations and their civilisations and poets and writers writing throughout the ages. Due to the distance, alienation, and estrangement that expatriate Iraqi poets have experienced while far from their homeland (Iraq), they consistently aim to hold on to everything eternal in their homeland. Since the *Epic of Gilgamesh* is an eternal epic that is unique among epics with its story based on eternity, Iraqi poets have taken it as a path to the eternity of Iraq by including it in their poetry while in North America, a country that embraced them during the wars in Iraq.

This work presents the following critical findings:

- The *Epic of Gilgamesh* is an intellectual beacon illuminating the paths of expatriate Iraqi poets, inspiring them to embrace the immortality of Iraq through their writing.
- This timeless epic demonstrates the importance of timeless human values, such as friendship and the search for immortality, and embodies the Iraqi identity and rich cultural heritage of Mesopotamia.
- The *Epic of Gilgamesh* symbolises the eternal human experience, transcending time and space and uniting generations and people.

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Within Empire's Shadow and Outside It: Lady Anne Blunt, Amelia Edwards, and the Victorian Female Traveler

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Abstract—This paper examines the travel writings of Lady Anne Blunt and Amelia Edwards, focusing on their contrasting portrayals of the Middle East and their different positions within imperial discourse. While both Victorian women contended with gendered constraints to assert authority as travel writers, their narratives reveal differing ideological orientations. Amelia Edwards, in *A Thousand Miles Up the Nile* (1877), exemplifies the imperial gaze, privileging the ancient Egyptian past while marginalizing the present. It can be argued that Edwards' narrative reflects Orientalist essentialism, reducing modern Egyptians to a static and inferior "Other" and reinforcing colonial hierarchies. In contrast, Lady Anne Blunt's *A Pilgrimage to Nejd* (1881) foregrounds the Bedouin present, offering an empathetic depiction of Arab social life. Blunt resists the exoticizing and dehumanizing tropes common in Orientalist discourse, instead centering local voices and knowledge. The paper argues that while both writers operated within the shadow of British imperialism, Edwards's work reinforces dominant ideologies, whereas Blunt's narrative offers a subtle counter-discourse that challenges the binary logic of East and West. This comparison underlines the ideological heterogeneity of Victorian women's travel writing and complicates the notion that female travelers were uniformly complicit in the imperial project.

Index Terms—Victorian travel writing, Orientalism, postcolonial criticism, Middle East in British literature, comparative literature

I. INTRODUCTION

During the nineteenth century, increased colonial ambitions and the rise of commercial tourism to the Middle East contributed to the growth of a significant literary genre—the travelogue. These narratives were often authored by male travelers, many of whom were supported by academic institutions or imperial agencies (Kabbani, 1986). These writers often presented themselves as brave explorers who traveled through unknown and "uncivilized" places, describing their journeys as adventurous and morally meaningful.

Their accounts commonly reinforced imperial ideologies by portraying the Middle East as a region in need of Western control, while simultaneously perpetuating reductive stereotypes of Arab societies as sites of barbarism and sensual excess (Kabbani, 1986). Travelogues did more than entertain; they helped construct the Orient in the Western imagination, often buttressing what Said (1978) famously termed "Orientalist" discourse.

Orientalism, as defined by Said (1978), is "a Western style for dominating, restructuring, and having authority over the Orient" (p. 3). Victorian travelers' descriptions of Eastern lands and peoples thus became part of a broader colonial project of knowledge and power. Notably, this discourse was long assumed to be the domain of male adventurers and scholars, but recent scholarship has drawn attention to the women who also wrote about the East, revealing that their perspectives both intersected with and differed from male colonial narratives.

Victorian women travelers occupied a complex position. On one hand, they were part of the colonizing culture and often relied on familiar Orientalist tropes to describe the "exotic" scenes before them. As Billie Melman observes, once outside the domestic sphere, even intrepid women writers tended to "draw on conventional or culturally dominant images of the Orient" in portraying landscapes and public spaces (Melman, 1992, p. 210). On the other hand, women's marginality in a male-dominated society created subtle distances between their voices and the standard imperial gaze.

Mills (1991) notes that nineteenth-century women travel writers labored under significant "discursive pressures" imposed by Victorian patriarchy (p. 12). Simply by traveling—and worse, writing about it—a woman transgressed norms: they were "bringing upon themselves criticism for both the writing and for the travels which they represented" (Mills, 1991, p. 41). Such pressures meant that female travelogues often adopted a careful, self-effacing tone, and their authors sought ways to assert authority without overstepping gender expectations. Mills points out that, unlike their male counterparts, women could not easily speak as authoritative agents of empire: "whereas men could describe their travel as individuals and as representatives of the colonial power, women could only travel and write as gendered individuals with clearly delineated roles" (Mills, 1991, p. 103).

In short, as Mills concludes, "women travellers could not wholeheartedly speak with the voice of colonial discourse, at least not consistently" (Mills, 1991, p. 106). Their subordinate social status afforded them "few discursive places within Western colonial institutions" from which to write with unchecked imperial authority (Mills, 1991, p. 106). This delicate

position produced travel narratives that were often ambivalent—participating in the imperialist Orientalist project to an extent, yet occasionally critical of or resistant to it. Victorian women's travel writing, therefore, must be understood as a dialogic practice: these writers operated within the empire's shadow, constrained by prevailing ideologies, but could also position themselves outside it. It is within this field of Victorian female travel writing that Lady Anne Blunt and Amelia Edwards made their mark.

Among the notable Victorian women who journeyed to the Middle East, Lady Anne Blunt (1837–1917) and Amelia B. Edwards (1831–1892) stand out for both their prominence and their strikingly different approaches to the Orient. Both women were respected public figures in their time, yet their travel narratives differed in tone and ideology, demonstrating the range of stances a female traveler could adopt toward imperial culture.

Lady Anne Blunt was an aristocrat (granddaughter of the poet Lord Byron) who, along with her husband Wilfrid Scawen Blunt, ventured into regions of the Middle East rarely seen by Europeans. Marrying in 1869, the Blunts spent the 1870s and 1880s trekking across the deserts of the Arab provinces—from Syria and Mesopotamia to the heart of Arabia (Najd). Within the broader context of Victorian women travellers, Lady Anne Blunt holds a pioneering status as the first European woman to traverse the Arabian desert—an achievement that earned her considerable recognition and respect. Her published accounts, notably *Bedouin Tribes of the Euphrates* (1879) and *A Pilgrimage to Nejd* (1881), chronicle these expeditions. In undertaking such journeys, the Blunts were not merely tourists but fashioned themselves as exploratory scholars of Arabian culture and geography. Furthermore, she drew extensively on her expedition notes and personal journals to inform the research underpinning her seminal work on the Arabian horse (Winstone, 2003, p. 141).

Melman (1992) characterizes Anne and Wilfrid as an “Orientalist couple” whose joint travel writing reveals telling tensions: between the authority of established Orientalist knowledge and the firsthand “individual gendered experience” of travel, and between “canonicity and the writing against canonical texts” (p. 276). In other words, Lady Anne Blunt's narratives oscillate between reinforcing received wisdom about the Orient and challenging it with her own observations. Crucially, the Blunts' personal political outlook set them apart from many contemporaries. Wilfrid S. Blunt was an outspoken critic of British imperial policy—a champion of Egyptian self-determination and Irish and Indian causes—and Lady Anne largely shared these sympathies. Writing as an “amateur” rather than an official colonial agent, she felt free to laud Arab governance and Bedouin autonomy at a time when European empires encroached on the region (Melman, 1992, p. 276). In sum, Blunt's writings, while couched in the Orientalist idiom of her era, carry an anti-imperialist undercurrent. She stands outside the empire's shadow in crucial ways, voicing respect for Eastern cultures and implicitly critiquing the notion of European superiority.

Amelia Edwards, by contrast, occupied a more conventional imperial vantage point despite her status as a female traveler. Edwards (1831–1892) emerged from a middle-class London family. Rees (1998, p. 4) notes that Amelia Edwards's father, Thomas Edwards, had served in the Peninsular War before leaving the army for health reasons and later supporting his family through a position at the London and Westminster Bank. An only child, Edwards received no formal education but developed an early fascination with travel literature. Rees (1998, p. 4) notes that in her youth, Edwards developed a fascination with exploration and antiquity, inspired by reading authors like Sir John Gardner Wilkinson and John Lloyd Stephens. Her passion for travel and antiquity later established her as a prominent figure in the field of Egyptology.

Edwards co-founded the Egypt Exploration Fund and became one of the leading figures in London's late nineteenth-century Egyptology circle (Youngkin, 2016, p. 11). As O'Neill (2009) asserts, “Edwards helped develop Egyptology as a discipline and was the person most responsible for fostering interest in ancient Egypt among Anglophones” (p. 44). The publication of her travel narrative *A Thousand Miles Up the Nile* (1877) significantly contributed to her public reputation as a credible authority on Egypt and the broader Orient.

Edwards' travel writing reflects a dual commitment: a deep enthusiasm for ancient Egyptian civilisation, coupled with a noticeable detachment from the contemporary local population. Her narrative constructs an imperial vision that celebrates archaeological exploration while largely excluding the lived realities of modern Egyptians. Ancient monuments are portrayed as mysterious and alluring, while the people inhabiting the land are marginalised and rendered culturally distant.

As O'Neill (2009) notes, this narrative strategy enabled Edwards to transition from the role of a popular novelist to that of a respected cultural authority within Victorian intellectual circles (p. 45). Her focus on uncovering the remnants of ancient civilisation reveals an imperialist orientation. Her accounts largely neglect engagement with present-day Egyptians, whom she effectively erases from the cultural landscape of her narrative (O'Neill, 2009, p. 46). Edwards' writing thus shows a woman enthusiastically within Orientalist discourse, using it to advance both her personal ambitions and the broader imperial project of studying the Orient.

Research Questions and Theoretical Framework

This paper is guided by several interrelated research questions: How did Victorian female travelers negotiate the dominant Orientalist discourse of their time? In what ways did their travel narratives reinforce or resist the imperial ideologies of the British Empire? And how did gender shape these authors' positions within—or outside—the imperial paradigm?

To address these questions, the study adopts a postcolonial theoretical framework rooted in Edward Said's concept of Orientalism and informed by feminist critiques of colonial discourse. Said's theory provides a foundation for

understanding how British travelers such as Edwards and Blunt constructed representations of Eastern peoples, and how these portrayals were shaped by the broader ideological structures of empire. In particular, Said's analysis of the binarism inherent in Orientalist discourse—the opposition between a rational, civilized West and a backward, exotic East—illuminates the ways in which knowledge production was linked to imperial domination.

At the same time, this study draws on insights from scholars like Billie Melman and Sara Mills, who foreground the role of gender in mediating women's travel narratives. Mills (1991), for instance, highlights how Victorian women writers were granted only limited "discursive places" within imperial culture (p. 106). Their outsider status, as women excluded from formal structures of imperial power, often required them to navigate carefully between conformity and critique. Consequently, women's travel writing frequently displays a hybrid position—operating within imperial discourse while also challenging it. This hybridity complicates traditional readings of female travel narratives as either wholly complicit or entirely resistant.

Through a comparative analysis of Lady Anne Blunt and Amelia Edwards, this paper contends that Victorian women's travel writing was far from monolithic. Edwards's narrative ultimately aligns with imperialist ideology and reflects an essentialist view of the East, affirming a classical Orientalist vision that emphasizes cultural inferiority. Her scholarly mission to recover and classify ancient Egypt exemplifies what Said (1978) describes as the Orientalist impulse to study, control, and "fix" the Orient within Western frameworks of knowledge (pp. 3-4). Edwards's text participates in a process of othering, wherein modern Egyptians are relegated to the background and denied historical agency.

By contrast, Lady Anne Blunt's account—though inevitably shaped by Orientalist conventions—embodies a more empathetic and open-ended mode of engagement. Writing from a position outside formal imperial institutions, Blunt privileges local knowledge and lived experience over textual inheritance and imperial authority. Her representations of Bedouin society resist the dehumanizing stereotypes common in colonial narratives and allow space for the *subaltern* voice to emerge, however incompletely (Blunt, 1881). Blunt's travelogue thus occupies a space of ideological hybridity—not entirely divorced from colonial structures, but not fully absorbed by them either.

Moreover, this paper builds on critiques of Said's model that caution against viewing Western representations of the East as uniformly hegemonic. As Osgood (2021) notes, Said's *Orientalism* overlooks key dissenting voices, including Wilfrid Scawen Blunt, a staunch anti-imperialist, and omits Lady Anne Blunt entirely (p. 49). This omission illustrates the need to refine the framework to account for ideological variation and the intersection of gender, class, and authorship.

In sum, while Edward Said's theory remains indispensable for tracing the structural dynamics of Orientalism, it must be expanded to accommodate the *gendered complexity* and *ideological heterogeneity* of Victorian women's travel writing. Edwards writes from within the shadow of empire, reinforcing imperial hierarchies through her authority as a cultural interpreter. Blunt, by contrast, offers a more dialogic and culturally responsive account that gestures toward resistance.

II. DISCUSSION

Both writers embarked on their journeys with prior knowledge of the region filtered through earlier Orientalist texts. Edwards openly acknowledges her deep literary familiarity with Egypt before her travels. She writes, "As a child *The Manners and Customs of the Ancient Egyptians* had shared my affections with *The Arabian Nights*. I had read every line of the old six-volume edition over and over again. I knew every one of the six hundred illustrations by heart" (Edwards, 1890, p. 375). As Melman (1992) notes, Victorian travelers, regardless of class or gender, often "knew" the Orient literarily before they ever saw it in person (p. 63). Edwards's early exposure to writers such as Edward William Lane shaped her imagination of Egypt through the binary lens of ancient greatness and modern decline.

This binarism, which casts the past as noble and the present as degenerate, reinforces essentialist assumptions about cultural stagnation. Lane's ethnographic work often portrayed modern Egyptians as culturally inferior, and Edwards echoes this view by constantly comparing the splendor of ancient ruins with what she describes as the "rude and barbarous present" (Edwards, 1890, p. 158). Her narrative thus contributes to the exoticism and othering of contemporary Egyptians by rendering them culturally static and subordinate to their own ancient past.

In contrast, Lady Anne Blunt's relationship with Orientalist precedent is more critical. Reflecting on her arrival in Jebel Shammar, she recalls reading Palgrave's "romantic account" years earlier, which she had doubted: "how impossibly remote and unreal it all appeared... and how, later during our travels, we heard of Nejd and Hai'l and this very Jebel Shammar, spoken of with a kind of awe" (Blunt, 1881, Vol. I, p. 242). Rather than replicate Palgrave's Orientalizing fantasy, Blunt disrupts the inherited narrative and validates local perspectives. Her account challenges the notion of epistemological authority as the sole domain of the Western traveler.

Her interaction with Bedouin guides, particularly Radi—who "has travelled backwards and forwards over the Nefud for forty years" (Blunt, 1881, Vol. I, p. 197)—signals an attempt to decentralize the imperial gaze by acknowledging indigenous expertise. In doing so, Blunt undermines the colonial impulse to alter and possess the Orient as textual property, and instead foregrounds hybridity between cultures as a mode of knowledge production.

Edwards's engagement with local people is framed by distance and dehumanization. Her repeated characterizations reduce Egyptians to figures of mimicry, greed, or superstition. For example, she writes: "Our men talked incessantly; and their talk was always about money" (Edwards, 1890, p. 151). In another anecdote, a guide admits to deliberately leaving stairs unbuilt so that tourists would require assistance: "No, no, mademoiselle! Arab very stupid to do that... Arab man earn no more dollars!" (Edwards, 1890, p. 442). These moments construct local people as economically driven and

morally suspect, reinforcing their position as the racialized Other. Edwards's description of a Nubian child as "an impish boy" with the "blackest skin and the shrillest voice," who "skips and screams and grins like an ubiquitous goblin" (Edwards, 1890, p. 158), exemplifies the Orientalist tendency to dehumanize the subaltern subject through grotesque caricature.

Blunt's portrayal of locals contrasts sharply, favoring empathy over exoticism. She writes admiringly of one companion: "He is a curious creature, but we like him, and, robber or no robber, he has quite the air of a gentleman" (Blunt, 1881, Vol. I, p. 126). Rather than othering or essentializing the Bedouin, Blunt registers their individuality—even their contradictions. Her farewell to the women in the harim—"I went in to the harim to say good-bye to the rest of the family" (Blunt, 1881, Vol. I, p. 189)—reflects cultural respect and mutual recognition, resisting the imperial gaze that often renders indigenous women invisible.

Whereas Edwards interprets talkativeness as a sign of inferiority—writing of Egyptians as "very talkative," yet "dumb as mutes when they found we wished for silence" (Edwards, 1890, p. 14)—Blunt registers the same behavior as cultural etiquette. "Abdallah, our host, asked us at least twenty times after our health before he would go on to anything else" (Blunt, 1881, Vol. I, p. 120). Rather than trivializing this repetition, Blunt treats it as an expression of hospitality and social norms. Edwards's formulation imposes a colonial logic of contradiction: the native is at once verbose and submissive, mirroring what Said terms the exoticized Other—simultaneously loud and silent, unruly and obedient, thereby easier to dominate and manage.

This binary reflects an essentialist framework that equates verbosity with irrationality and politeness with servility. Such an interpretation reduces Egyptian sociability to a static cultural trait rather than acknowledging its contextual and communicative richness. By contrast, Blunt's reading deconstructs the essentialist notion that "Eastern" talk is inherently excessive or meaningless. Instead, she sees it as an integral part of social interaction and emotional exchange.

The concept of mimicry, as articulated by Homi Bhabha, is central to Edwards's account of her Egyptian guides singing "Yankee Doodle" and "God Save the Queen" atop the Great Pyramid: "which, however, we took the liberty to doubt" (Edwards, 1890, p. 442). This performative mimicry, rather than signifying cultural hybridity, becomes a spectacle designed for Western consumption. The colonized subjects are reduced to parodic reflections of the colonizer—never fully themselves, nor fully the Other. The musical performance here functions as a rehearsed compliance to colonial expectations, stripping the act of any authentic voice or agency. Edwards's tone further exacerbates this, casting doubt on the sincerity of the act and implying that the natives merely echo Westernness without understanding it. This kind of mimicry sustains a hierarchical distance between colonizer and colonized, where the latter is eternally trapped in an imitative role.

In contrast, Blunt's account of singing alongside her companions—"we galloped on singing the Shammar song" (Blunt, 1881, Vol. II, p. 178)—evokes a moment of intercultural hybridity. Here, music is not a performance for the colonial gaze but a shared cultural moment that symbolically disrupts the colonial hierarchy. Blunt's engagement reveals a form of horizontal interaction that transcends mimicry and opens space for mutual cultural recognition. This moment can be read as an act of symbolic decolonization—one in which music becomes a mode of relationality rather than domination. Her willingness to participate, rather than merely observe, emphasizes her resistance to the exoticizing gaze that renders local culture as spectacle. Instead of reducing the Other to a tool of imperial amusement, Blunt highlights music as a living tradition that fosters connection rather than submission.

Edwards frames Egypt as a frozen monument, a palimpsest of imperial significance waiting to be deciphered. She recounts "standing there close against the base of it; touching it; measuring her own height" (Edwards, 1890, p. 12), positioning herself as the symbolic custodian of Egyptian history. The living landscape and its people are backgrounded, subordinated to ruins. This spatial construction mirrors the Orientalist impulse to essentialize the East as timeless, exotic, and in need of Western stewardship. Blunt, conversely, describes the desert as a space of movement, not stasis. It is populated, known, and traversed—not mysterious or vacant.

Even when discussing ethnic identity, Blunt refrains from broad generalizations. She inquires how tribes distinguish one another and records her guide's detailed explanation: "each has certain peculiarities of dress or features... The Roala spears are shorter, and their horses smaller. The Shammar of Nejd wear brown abbas, the Harb are black in face" (Blunt, 1881, Vol. I, p. 203). By foregrounding local perspectives, Blunt resists the essentialist impulse to reduce diverse Arab groups to a single identity. Instead of assuming a homogenous culture, she acknowledges differentiation and alters the imperial norm of flattening cultural distinction.

Blunt's ethnographic attention illustrates an attempt to decenter imperial authority and amplify subaltern knowledge. Rather than positioning herself as an omniscient narrator, she allows indigenous voices to speak with authority about their own cultural categories—thus challenging the asymmetrical power dynamic of colonial knowledge production. This contrasts sharply with Edwards's sweeping claim that "for the life of the Beled repeats itself with but little variation wherever the Nile flows and the Khedive rules" (Edwards, 1890, p. 150). Such a statement collapses individual and regional differences into one static image.

Edwards's representation of Egypt is marked by a stark binarism between a glorified ancient past and a degraded modern present. This dichotomy culminates in her lament at the market in Aswan: "no relics of a past civilization; but, on the contrary, such objects as speak only of a rude and barbarous present" (Edwards, 1890, p. 158). The term "barbarous" reflects an essentialist assumption about modern Egyptians' supposed lack of cultural refinement, effectively positioning

them as inferior successors to a noble past. By denying historical continuity and rendering the present as culturally vacuous, Edwards implicitly justifies the imperial project of recovery, control, and “civilizing” intervention.

Blunt, by contrast, refuses this temporal hierarchy. She begins her book by writing, “Nobody here thinks of the past or the future, only of the present” (Blunt, 1881, Vol. I, p. 34). This emphasis on the present moment resists the Orientalist tendency to view the East only as a relic of the past. Her observation that “It is like a dream to be sitting here, writing a journal on a rock in Jebel Shammar... a happy land which nobody but [Palgrave] had seen” (Blunt, 1881, Vol. I, p. 247) reclaims space for the lived experience of Arab communities. It suggests a challenge to the imperial habit of temporal othering, which often freezes the Orient in an imagined historical past while denying its modern vitality.

Edwards consistently interprets the economic behavior of locals through a colonial lens of suspicion and contempt. “Our men talked incessantly; and their talk was always about money” (Edwards, 1890, p. 151), she complains, framing their concerns as petty and morally inferior. This portrayal reflects both essentialism and dehumanization, suggesting that material greed is an intrinsic and immutable trait of the colonized subject. Such language constructs Egyptians as inherently Othered: childlike, greedy, and incapable of higher ideals. This trope has a long colonial legacy, where native populations are seen as governed by base instincts, requiring European discipline and oversight.

In contrast, Blunt actively counters this Orientalist binarism. After a journey with two Shammar men, she writes, “Both these Shammar were exceedingly intelligent well-mannered men, with souls above money” (Blunt, 1881, Vol. II, p. 40). Her phrasing challenges the assumption that Arab subjects are economically driven caricatures, offering instead a dignified, humanized account. In recognizing honor and restraint, Blunt subtly undermines the imperial stereotype of the greedy native and affirms the agency of the subaltern as capable of ethical complexity and cultural depth. Despite emerging from similar cultural, temporal, and generic contexts, the travel narratives of Amelia Edwards and Lady Anne Blunt diverge sharply in tone, perspective, and ideological orientation. Both texts—*A Thousand Miles Up the Nile* (1877) and *A Pilgrimage to Nejd* (1881)—were authored by Englishwomen writing within the male-dominated genre of Middle Eastern travel writing. Their proximity in time, nationality, and gender makes them particularly valuable for exploring the layered complexity of women’s positions within colonial discourse.

Gender is a central mediating factor in how both women navigate authority and authorship. Edwards constructs a voice of empirical objectivity that mirrors the scholarly detachment of male Orientalists. She reclaims space within the emerging discipline of Egyptology by foregrounding her archaeological interests and minimizing engagement with the living culture around her. Edwards’s Egypt is not a place of lived experience but a landscape of ruins and relics—symbolic of a fallen civilization waiting to be recovered, ordered, and interpreted by the Western gaze. This method illustrates a classic binarism between past and present, civilization and barbarism, which Orientalist discourse uses to justify Western dominance.

This move, as Said (1978) argues, is central to the Orientalist project: knowledge becomes a mode of control, and the scholar a surrogate for imperial mastery. Furthermore, by dehumanizing the Egyptian population and reducing them to stereotypes, Edwards perpetuates a discourse of *othering* that renders the native subject mute, passive, and inferior.

In contrast, Blunt neither seeks scholarly distinction nor casts herself as an interpreter of a lost past. Her authority derives from immersion and observation rather than systematization or excavation. She embraces ambiguity, foregrounds the present, and willingly acknowledges what she does not know. This openness to cultural hybridity and her rejection of essentialist portrayals of Arab identity distinguish her writing from conventional imperial modes. Her respect for Bedouin knowledge, her descriptions of everyday life, and her openness to cultural differences reveal a mode of travel writing grounded in humility rather than hierarchy. Though she occasionally romanticizes her surroundings, her willingness to listen rather than lecture represents a significant departure from Edwards’s method.

This divergence is also deeply rooted in class and political alignment. Edwards, a middle-class woman seeking professional legitimacy, finds empowerment by aligning with imperial institutions and Orientalist discourse. Her self-positioning as a cultural authority requires the marginalization of modern Egyptians, whose alleged indifference to their heritage justifies her role as protector of ancient glory. Blunt, with aristocratic privilege and anti-imperialist leanings, approaches her travels from a different angle. Her political sympathies with causes like the Urabi Revolt and her admiration for Bedouin social order make her less inclined to adopt the patronizing tone common in imperial narratives (Blunt, 1881).

Yet Blunt does not entirely escape Orientalism. Her depictions sometimes reproduce the trope of the noble Arab or exoticize local customs. This suggests the persistent allure of *exoticism* even in otherwise sympathetic accounts. Nevertheless, these moments are embedded within a broader ethos of mutual recognition. If Edwards (1877) flattens difference into stereotype, Blunt (1881) preserves it in detail. Her travelogue offers not just an alternative to Edwards’s, but a subtle critique of the imperial mindset itself.

Both writers also reflect the complex tension between complicity and critique. Edwards reproduces many of the foundational tenets of Orientalism, yet her gendered position outside formal structures of empire complicates her authority. She constructs a scholarly persona that compensates for her exclusion from academic institutions, but in doing so, replicates the exclusions of Orientalist discourse itself. Blunt, by contrast, turns her marginality into a strength. By resisting the authoritative stance of the colonial observer, she creates space for subaltern voices and practices that challenge imperial presumptions.

These two narratives thus underscore the ideological heterogeneity of Victorian women's travel writing. Neither woman fully inhabits nor escapes the imperial frame—rather, they both exist in a space of hybridity, negotiating competing discourses of gender, empire, and authorship. Their writings invite us to move beyond reductive binaries and recognize the nuanced ways women navigated the cultural and political structures of empire.

III. CONCLUSION

This paper has explored how Amelia Edwards and Lady Anne Blunt, two Englishwomen writing within the same genre and period, negotiated their roles as travelers and narrators of the Middle East. While both operated within the ideological space of empire, their works diverge sharply in how they construct authority, engage with local cultures, and position themselves within Orientalist discourse.

Edwards's *A Thousand Miles Up the Nile* (Edwards, 1877) embodies the epistemological and moral assumptions of Orientalism. Her text transforms Egypt into an archaeological spectacle, its living inhabitants relegated to the margins of historical relevance. Her mission to recover the past and “preserve” antiquity culminated in the establishment of the Egypt Exploration Fund (Youngkin, 2016)—an institution that not only legitimized British archaeological dominance but institutionalized the Western claim over Egypt's cultural heritage. Through her gaze, Egyptians are dehumanized, reduced to symbols of decay that validate the superiority of Western rationality and scholarship. Her travelogue is not merely a document of observation but a performance of cultural appropriation, where knowledge acquisition goes hand in hand with imperial possession.

By contrast, Blunt's *A Pilgrimage to Nejd* (Blunt, 1881) offers a counter-narrative rooted in attentiveness to the present and a willingness to engage with the complexities of Arab social life. Her authority arises not from textual inheritance or institutional backing but from embedded observation and sustained interaction. Rather than extract value from the region, Blunt sought to create connections—exemplified by her interest in breeding Arabian horses with English ones, a gesture that, while not devoid of hierarchy, suggests exchange over appropriation. Her text resists the reduction of the East to a static past, instead recognizing Bedouin autonomy and cultural richness in the present. In place of conquest and classification, Blunt (1881) models a different mode of engagement—one grounded in receptivity, reciprocity, and respect.

Future research might extend this comparative approach to include female travelers from other imperial or national backgrounds—French, Ottoman, or even Arab women writing in the late nineteenth century. It could also benefit from transregional analysis, comparing representations of the Middle East with those of other colonized spaces, such as India or North Africa. Such scholarship would continue the work of destabilizing the presumed unity of imperial knowledge and foreground the multiplicity of perspectives embedded within it.

Ultimately, the comparison between Edwards (1877) and Blunt (1881) illustrates that Victorian women's travel writing, far from being uniform, was shaped by complex negotiations of gender, power, and ideology. Their contrasting narratives demonstrate that imperial discourse is not monolithic but internally fractured—where strategies of domination, mimicry, and critique coexist. Within the shadow of empire, some voices reinforced its foundations, while others stepped outside its frame.

Notes:

1. All quotations from Amelia B. Edwards's *A Thousand Miles up the Nile* are taken from the 1890 A. L. Burt edition (via Archive.org). References to the publication year refer to the original 1877 edition.
2. All quotations from Lady Anne Blunt's *A Pilgrimage to Nejd* are taken from the 1881 John Murray edition (via Archive.org). References to the publication year refer to the original 1881 publication.

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Trainers' Perceptions of Undergraduate Translation Technology Course Design and Delivery

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Abstract—As a key driver in the global language services, translation technology has emerged as a central element of modern translation education. Consequently, training in translation technology has become an indispensable part of translation programs at the tertiary level to develop students' technological competence. Nevertheless, there remains a marked disparity between the rising technological complexity of the translation market and the training provided in undergraduate translation technology courses, as perceived by trainers. To fill the gap, this qualitative study adopted Kelly's (2005) translator training curricular design model as its theoretical framework and employed semi-structured interviews with 12 trainers from higher education institutions in Shaanxi Province, China, to examine their perceptions of the design and delivery of undergraduate translation technology courses. The results revealed that trainers reported a range of issues, including the imbalanced integration of technological competences, inconsistent content coverage, generally insufficient resources, and limited teaching and assessment methods. In particular, they made recommendations for addressing the most pressing challenges, namely, inadequate staff provision and the isolation of the course from the broader translation curricula. It is hoped that the findings of the study will shed light on the challenges faced by translation technology trainers and contribute to enhancing the design and delivery of translation technology courses in similar contexts.

Index Terms—translation technology course, technological competence, trainers' perceptions, course design, course delivery

I. INTRODUCTION

Driven by economic globalization and evolving technologies, the global language service market keeps expanding in spite of the uncertain global economy. Massive volumes of digitalized content, coupled with increasing demands for their adaptation into multiple languages, have posed a challenge to modern language service providers and the translation industry (Mellinger, 2017). In response to the ever-increasing time pressures, various translation technologies and tools have been developed and widely used by industry stakeholders (Rothwell et al., 2023). The wide variety of ubiquitous software tools and linguistic resources has given rise to the transition of the 'technological turn' (O'Hagan, 2013) in translation reality and enabled translators to enhance the productivity and quality throughout the translation process (O'Hagan, 2019).

Translation technologies not only have empowered the global language services industry but also brought both opportunities and challenges to the development of translation pedagogy and translator competence (Alonso, 2015). Technological competence, denoting the ability to use effectively a broad spectrum of translation-related digital tools and online resources, has become a fundamental component of translator competence, as outlined in the Translator Competence Framework developed by the European Master's in Translation (EMT, 2022) in the European context. While in the Chinese context, the *Teaching Guidelines for Undergraduate Translation Major* (Zhao & Feng, 2019) have acknowledged translation technology as a core course within the translation curricula and identified four key areas of translation technology training at the undergraduate level: information searching, terminology, translation memory, and machine translation (Xiao et al., 2021). Wang and Li (2021, p. 16) surveyed 434 Chinese universities and found that 71.92% offer translation technology training as either elective or compulsory courses.

Although translation technology training has become a crucial part of translation pedagogy over the last decade

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(Zhang & Vieira, 2021; Rodríguez-Castro, 2018; Man et al., 2019; Chan & Shuttleworth, 2023), a review of the literature indicates that, in many universities outside the European context, translation technology training has been insufficiently implemented and received inadequate recognition (Tao, 2023). In China, insufficient training in translation technology has hindered the development of students' technological competence (Wang et al., 2018). Recent feedback from language service providers notes that most translators received inadequate translation technology training, resulting in technological competences that do not meet professional demands (TAC, 2023). Furthermore, the *Report on the Language Services Industry in China* highlights that bachelor translation graduates comprise the main workforce in the industry, accounting for 43.2% of the labor market (TAC, 2023). However, there is a scarcity of empirical research addressing undergraduate translation technology training in China through the lens of trainers. Hence, further research is required to examine the design and delivery of undergraduate translation training and explore the barriers that hinder the course development.

Course design is vital to enhancing the quality and effectiveness of translation technology training (Kelly, 2014). A well-designed translation technology course ensures that its delivery and outcomes are aligned with professional realities. Accordingly, the present study aimed to fill the gap by investigating trainers' perceptions of the design and delivery of undergraduate translation technology training in Shaanxi Province, China, via qualitative data collected from semi-structured interviews. To this end, Kelly's (2005) translator training curricular design model was adopted to help the researcher navigate through the study, which was ultimately intended to refine and improve undergraduate translation technology training in China.

II. LITERATURE REVIEW

A. Kelly's Translator Training Curricular Design Model

Since translation technology training falls within the scope of Applied Translation Studies as Munday (2016, p. 20) maps and plays a critical role in modern translator education, this study is relevant to the design of translator training programs, which has been extensively studied by Kelly (2005) in her work.

Kelly's (2005) translator training curricular design model (see Figure 1), based on the systematic approach to translation program development proposed by D'Andrea (2003), is a holistic framework for designing translation curricula. The model begins by identifying the external social and institutional contexts, then proceeds to formulate the learning outcomes that focus on translator competence, considering the needs of the profession, society, and discipline. It then identifies the availability of resources and the profile of both trainers and trainees before determining how translation teaching activities are designed, sequenced, and coordinated with assessment methods. Finally, it concludes with evaluation and implementation for the purpose of quality enhancement of the curriculum.

Kelly's (2005) translator training curricular design model was adopted and contextualized to serve as the framework underpinning this study. The model is particularly well-suited to the present study, as it integrates social needs and professional and disciplinary factors and is informed by Kiraly's (2000) social constructivist approach, a pedagogical perspective widely recognized as essential for the effective design of technology-based translator training. Additionally, the model emphasizes a competence-based and student-centered approach to defining course aims and intended learning outcomes, offering a robust framework for the design of technology-oriented courses aimed at developing students' technological competence. Moreover, the model's logical progression provides a step-by-step structure that serves as a systematic and holistic roadmap for designing a collaborative and interactive translation technology course.

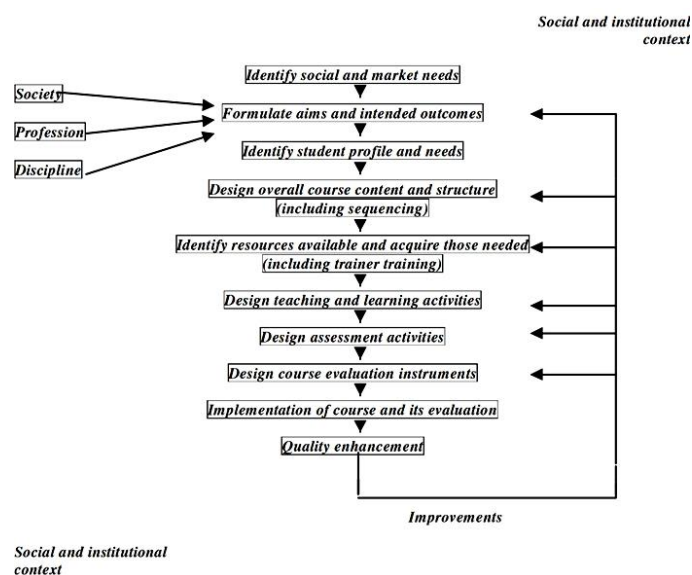


Figure 1. Kelly's (2005) Translator Training Curricula Design Model

B. Translation Technology Training

Researchers in the field of translation studies tend to agree that modern translators are required to possess expert knowledge and skills, or ‘translation competence’ (Kelly, 2014), in certain areas to perform translation tasks (Alcina, 2008; PACTE, 2011; EMT, 2022). Influenced by the digitalization of texts and the inception of translation technologies, translation competence now entails the ability to adopt tools and resources in the translation process (Király, 2000). Hence, technological competence, or instrumental competence, has become an increasingly critical requirement, sometimes even preceding other skills needed by a professional translator (Pym, 2003). The Translators Association of China has recognized technological competence as one of the essential requirements for the translation profession (TAC, 2023). Wang and Wang (2016) propose a taxonomy that further breaks translation technological competence down into sub-competences in five areas, including basic computer literacy, information mining competence, computer-assisted translation (CAT) ability, terminology management competence, and machine translation post-editing (MTPE) competence. They highlight that these five sub-competences, which are closely linked to a translator’s overall information literacy, constitute the framework of technological competence.

The increasing importance of technological competence in the present digital climate has triggered ideas among researchers about how technological competence can be acquired and developed through translation technology training (Doherty & Moorkens, 2013; Bowker, 2015; Xiao & Qian, 2021; He et al., 2022; Chan & Shuttleworth, 2023). Previous studies regarding translation technology training were concerned with several topics, including the divergence of the undergraduate and postgraduate levels (Davies, 2004, p. 67), the scope of technologies and tools to teach (Çetiner, 2018), the timing of training and teaching methods (Austermühl, 2013), the assessment methods (Tao & Wang, 2022), and the generative AI technologies involved in the training (Abbas et al., 2024).

To address the above-mentioned issues, some researchers proposed their course plans regarding translation technology training. For instance, Rodríguez-Castro (2018) published a course proposal on computer-assisted translation (CAT) at the University of North Carolina at Charlotte. The course was designed as an introductory graduate-level program, focusing on modules such as project creation, terminology management, translation memories, post-editing, and software localization. The course aimed to improve the acquisition of technical skills through well-defined learning outcomes. Virtual reality simulation (VRS) and task-based learning were adopted as key teaching methods, along with an assessment using portfolios to encourage students’ critical thinking. The effectiveness of these learning outcomes was evaluated based on students’ translation performance and perceptions in a pilot graduate course. The results showed that although most students reported improvements in their professional skills and recognized the importance of lifelong learning to maintain their competitiveness, some felt unprepared to undertake real-world projects. The complexity of the course content was considered overwhelming for undergraduate students because it demanded a high degree of computer literacy and a basic understanding of the translation industry, which posed challenges for students who lacked these prerequisites in the Chinese context.

Sánchez-Castany (2023) conducted a qualitative study to examine the integration of translation technology into undergraduate translation module syllabi by interviewing translation trainers at higher education institutions in Spain. The study gathered in-depth information on the trainers’ perceptions, motivations, commitment, and experiences. The results showed that most trainers were committed to incorporating non-specialized translation technology in translation lessons and were aware of the importance of CAT tools for professional translators. However, they cited challenges such as unavailable resources, insufficient funding, and unequipped classrooms as barriers to broader technology integration. Moreover, many trainers reported negative self-perceptions regarding their own technological competences. The study concluded that Spanish higher education saw limited integration of translation technology. The translation curricula primarily include introductory knowledge of CAT tools, project management, terminology management, and machine translation. While this study offers essential insights into translation curricular development and encourages translation trainers to incorporate translation technologies more actively, the study’s findings are limited to the Spanish context.

Zappatore (2024) proposed a master course plan focused on computer-assisted scientific translation, aiming to support CAT teachers specialized in computer science and improve student engagement with a balanced scope of the most significant topics in this field. A multi-framework CAT course methodology called CATDeM was developed in the study. This framework integrates the European translation competence framework, lab sessions that simulate real-life situations, collaborative learning supported by computer and network, case study discussions, and role-playing activities. Students’ perceptions of the proposed course were evaluated via a self-assessment questionnaire. The results revealed that the proposed course enhanced student engagement and improved students’ skills in translation, technology, and interpersonal relations. Although this study provides valuable insights for translation technology course design and development, it is limited by its confined focus on computer-assisted translation (CAT) training and postgraduate level.

Although prior research offers valuable insights into designing and delivering translation technology training, to our knowledge, empirical studies investigating trainers’ perceptions of undergraduate translation technology course design and delivery within the Chinese context remain absent. To address this gap, the present study drew on Kelly’s (2005) translator training curricular design model and explored trainers’ perceptions through qualitative data gathered via semi-structured interviews.

III. METHODOLOGY

A. Participants

The initial sample consisted of 15 trainers from universities and colleges in Shaanxi Province, China, who taught undergraduate translation technology courses during the 2024-2025 academic year. To ensure the recruitment of participants with relevant experience, the purposive sampling method was used. However, three participants withdrew from the study due to institutional restrictions, resulting in a final sample of 12 trainers, each representing a different institution in the region that offers undergraduate translation technology courses or similar modules under varying course titles. Prior to the interviews, all participants were clearly informed about the study's purpose and scope. They were made aware that participation was entirely voluntary to reduce potential bias and ensure authenticity of their responses. Written informed consent was obtained from each participant in accordance with standard research ethics principles.

B. Instrument

Two research instruments were used in this study. First, a pre-questionnaire was developed by the researcher and administered to potential participants to gather demographic data. Second, semi-structured interviews were conducted to collect in-depth qualitative data on the predefined aspects of the translation technology courses under investigation and trainers' perceptions and experiences. The choice of semi-structured interviews over structured ones was guided by the need for greater flexibility, allowing the researchers to explore topics and issues introduced by the interviewees in more depth (Braun & Clarke, 2013). The interview items were adapted from previously validated instruments from Wagenaar (2019) and Sánchez-Castany (2023) to ensure content validity. The interview content was further informed by the existing literature on translation technology training, particularly the core dimensions highlighted in previous studies. Based on the procedures and principles of curricular design outlined in Kelly's (2005) model, the interview consisted of six major items, each supplemented by a set of follow-up probes designed to clarify responses and elicit more in-depth feedback. The interviews sought to elicit detailed qualitative data from the participants concerning the following key course dimensions: learning outcomes (technological competences), course content, available resources, and teaching and assessment methods, as well as challenges and constraints encountered in course design and delivery. Additionally, participants were encouraged to share their recommendations.

C. Data Collection and Analysis

The semi-structured interviews were conducted online via Tencent Meeting (VooV Meeting), which is easy to use and reliable for audio recording and data storage, from April 5 to May 20 in 2025. Each interview lasted for 30 minutes on average. The interviews were recorded, transcribed verbatim, and anonymized for confidentiality purposes with the participants' consent.

Interview transcripts were analyzed using an a priori coding system based on template analysis (King, 1998). The codebook was purposefully developed from Kelly's (2005) model to guide the identification and interpretation of meaning. Thematic analysis (Braun & Clarke, 2006) was also employed to identify themes and patterns that emerged from the participants' unexpected or nuanced responses, particularly those elicited through follow-up probes during the interviews. To enhance research reliability, a second coder was invited to review a sample of the transcripts based on the researcher's established codebook. Although it would have been ideal to conduct a full second coding, Saldanha and O'Brien (2014, p. 31) suggest that recoding a subset of the data can still offer valuable insights into the consistency of the initial coding. The coding process was conducted using NVivo 14.0 software.

Patterns in trainers' responses were identified through template and thematic analysis, which facilitated an examination of their experiences, opinions, concerns, and expectations. Regarding the trainers' perceptions of the design and delivery of undergraduate translation technology courses, particular attention was given to the dimensions predefined in the theoretical framework adopted in this study. In addition, the analysis sought to identify and explore the challenges faced by trainers and the factors that may account for them.

IV. FINDINGS AND DISCUSSION

A. Demographic Profiles

TABLE 1
DEMOGRAPHIC PROFILES OF THE PARTICIPANTS

Code	Gender	Age	Specialization	Position	Years of Experience	Institution Type
A01	Male	46-55	Translation Technology; Project Management	Professor	7-9 years	Language
A02	Female	≤35	Translation Studies; Discourse Analysis	Lecturer	0-3 years	Engineering
A03	Male	46-55	Translation Studies; English Teaching	Lecturer	≥10 years	Agriculture
A04	Male	36-45	Scientific Translation; CAT	Associate Professor	7-9 years	Science
A05	Female	≤35	Scientific Translation	Assistant Lecturer	0-3 years	Science
A06	Female	36-45	Applied Linguistics; Translation Studies	Associate Professor	4-6 years	Engineering
A07	Male	36-45	Technical Translation; CAT	Lecturer	4-6 years	Engineering
A08	Female	36-45	Applied Translation; Translation Studies	Lecturer	0-3 years	Language
A09	Male	46-55	Translation Studies; Language Services	Professor	≥10 years	Comprehensive
A10	Male	≤35	Translation Studies; English Pedagogy	Lecturer	0-3 years	Normal
A11	Male	≤35	Translation Studies	Lecturer	0-3 years	Science
A12	Female	36-45	Corpus-based Translation; Computational Linguistics	Associate Professor	4-6 years	Comprehensive

As Table 1 shows, this study involved 12 translation technology trainers (7 men, 5 women) coded as A1-A12 for anonymity purposes, representing a diverse range of demographic and professional backgrounds. With respect to age, participants were predominantly in the 36-45 and 46-55 age ranges, with 3 participants aged 35 or younger and no participants above 55.

In terms of academic specialization, it is noteworthy that Translation Studies show a predominant presence, appearing in the profiles of 9 participants (75%). Other areas of specialization are also relevant to translation technology training despite that their contributions may vary in focus and scope. The finding is generally consistent with the previous study (Tian, 2025), which found that 70.98% of translation instructors have a background in linguistics, while only 6.25% possess a background in computer science or interdisciplinary studies. This finding indicates that interdisciplinary integration between translation studies and computer science remains limited, reflecting the reality that most institutions position translation technology as a subfield of applied linguistics or translation studies, rather than as an area that necessitates collaboration with computer science departments.

B. Codes and Themes

The following subsections report preestablished codes or identified themes and subthemes in the dataset, along with the interviewees' perceptions of a range of topics, including technological competences as learning outcomes, course content, resource availability, teaching and assessment methods, and challenges faced by trainers and students. Furthermore, the frequency of trainers sharing similar opinions is noted when relevant.

(a). Technological Competences as Learning Outcomes

According to Kelly (2005), the first step in designing a translator training course is to formulate a set of specific learning outcomes, which define the competences students are expected to acquire upon completion of the course. Therefore, the aim of the first predefined code in this study was to capture the technological competences as learning outcomes specified in the undergraduate translation technology courses under investigation.

The analysis revealed seven commonly identified technological competences across the syllabi cited by the trainers, including translation memories ($n = 12$), machine translation post-editing (MTPE) ($n = 9$), basic computer literacy ($n = 8$), terminology management ($n = 6$), information mining ($n = 5$), quality assurance (QA) ($n = 3$), and corpus application ($n = 2$).

It was found that the ability to use translation memories ($n = 12$) is universally included in all the investigated courses, indicating that CAT (computer-assisted translation) tools, such as Trados, MemoQ, Smartcat, or YiCAT, remain a core component of undergraduate translation technology training. This finding is unsurprising, as CAT tools have long been considered fundamental to translation technology (Bowker, 2015; Kornacki, 2018; Su & Li, 2023). Moreover, nearly all trainers ($n = 11$) reported a growing awareness of the importance of these tools in professional practice across both undergraduate and postgraduate levels (Wang & Liu, 2022).

The competence to carry out MTPE tasks ($n = 9$) was explicitly identified in a majority of the courses, indicating increasing recognition of MTPE as an essential industry-relevant competence in translator training. This finding aligns with Al-Batineh and Al Tenaijy (2024), who identified MTPE as a secondary but essential technology-related practical skill in translation programs in the Arab world. Driven by artificial intelligence technologies, MTPE has emerged as a widely adopted practice among language service providers to enhance productivity and reduce cost (Koponen, 2016). However, several trainers ($n = 7$) expressed concerns that introducing machine translation too early in a student's training may undermine the development of translator agency (Nunes Vieira, 2019) and ultimately have a negative impact on students' linguistic competence. Although most interviewees held positive attitudes toward this competence and acknowledged MTPE as a prevailing reality in the industry, some trainers (A03; A06) opposed its inclusion and argued that students should first develop basic linguistic and revision skills before engaging in post-editing machine-translated texts.

Basic computer literacy, recognized as a critical prerequisite for employability (Al-Dabbagh & Othman, 2024), was reported to be explicitly included in most of the examined courses ($n = 8$). This finding is encouraging because it shows that an increasing number of institutions are beginning to stress the development of students' foundational computer skills given the backdrop of China's translation education system, where most translation students from humanities backgrounds lack confidence and motivation in learning specialized technologies (Zhao, 2025).

However, the low presence of the remaining four specialized competences, including terminology management, information mining, quality assurance, and corpus analysis, as reported by the trainers, indicates an imbalanced formulation of learning outcomes and a gap between industry and academia.

(b). Content Coverage

The second code, established based on Kelly's (2005) model, attempted to identify the content covered in the investigated courses. The analysis revealed ten common addressed content areas, including basic principles of CAT ($n = 12$), construction and use of translation memories ($n = 12$), the potentials of CAT and MT ($n = 12$), hands-on practice of CAT tools ($n = 10$), professional roles and translation workflows ($n = 8$), file format conversion ($n = 7$), terminology management ($n = 6$), information searching skills ($n = 5$), translation project management ($n = 4$), and creation and use of corpora ($n = 2$). However, topics such as audiovisual translation, desktop publishing, and localization were notably absent from the curricula.

Although it is encouraging to see that half of the cases align with the *Teaching Guidelines for Undergraduate Translation Programs* by incorporating key components such as information searching, terminology management, translation memories, and machine translation (Zhao & Feng, 2019), considerable variation in course content persists across programs. This divergence could be attributed to different institutional contexts and the varied trainers' profiles. In several cases ($n = 9$), trainers expressed concerns that the course content may lack coherence and consistency, indicating only partial alignment with the national recommended framework. This finding resonates with Wang and Li's (2021) study, which identified gaps in the inclusion of essential technology modules within translation technology curriculums.

More than half of the trainers ($n = 8$) held less favorable opinions, contending that offering a stand-alone course is inadequate for students to develop the practical skills required by the industry upon graduation. These concerns echo Shuttleworth's (2017, p. 38) assertion that the goal of technology-based translation modules should be to prepare versatile problem solvers rather than users reliant on specific software systems. Moreover, the trainers expressed differing views regarding the appropriate timing for offering the course. Over half of the trainers ($n = 7$) believed that translation technology should be introduced early, ideally in the first academic year, while also stressing the importance of thoughtful course sequencing and duration. In contrast, other trainers ($n = 5$) argued that students should first develop translation skills without technological intervention, cautioning that early exposure to specialized tools might weaken students' acquisition of core language competence.

(c). Resource Availability

Kelly (2014) argues that effective technology-based translator training requires a broad range of resources, including appropriate physical infrastructure (e.g., computer labs), conventional teaching materials, up-to-date technologies (e.g., licensed software), mobility programs (e.g., staff and student exchanges, cooperative projects), and professional placements involving external experts and industry visits.

In terms of resource availability, computer labs ($n = 10$) were reported by the trainers as the most commonly provided resource, underscoring the essential role of physical infrastructure in facilitating hands-on practice for translation technologies. However, other resources were found considerably inaccessible. Online platforms ($n = 4$), such as learning management systems and cloud-based tools, were infrequently reported, indicating a lag in the integration of digital learning environments. Similarly, opportunities to invite industry experts as guest lecturers ($n = 4$) were limited. Only a few trainers noted institutional access to authentic translation projects ($n = 3$) and student work placements ($n = 3$), which were typically arranged through partnership with local language service providers.

Some trainers ($n = 5$) reported that although computer labs are available, limited access to paid software licenses poses a significant challenge. In many cases ($n = 7$), the lab facilities were reported as outdated and inadequately equipped, prompting students to bring their own laptops to class. A few trainers ($n = 2$) reported that they have no

access to labs and have to demonstrate the procedural knowledge of using CAT tools without providing hands-on experience for students. There was unanimous agreement among the trainers on the need for better-equipped labs, including the integration of course management systems (CMS) and enough computers to ensure that each student has a dedicated workstation.

Regarding students' work placements and internship opportunities, only a small number of trainers ($n = 3$) stated that their institutions have established connections and collaborations with some local language service providers to guarantee such opportunities. One interviewee (A11) explained, 'Our institution has signed partnership agreements with local translation companies, but implementing placements is hard. The companies care more about efficiency and profitability and are reluctant to host undergraduate interns with limited experience, as this can disrupt workflows and increase operational costs without getting quick returns...'.

These findings underscore broader inconsistencies in the availability of professional and digital resources and reflect a lack of institutional support and funding, a concern also raised by Al-Dabbagh and Othman (2024), whose interviewees noted that administrators often perceive internships and placements as costly and time-consuming due to the need to assign staff members to instruct, observe, and supervise students during the process.

(d). Teaching and Assessment Methods

Concerning the teaching methods used by the interviewed trainers, five common approaches were identified through analysis of the data. The trainers revealed that PowerPoint tutorials ($n = 11$) were the most predominant approach, through which students received direct instructions on procedural knowledge, including how to access relevant resources and operate specific translation tools. Other methods were reported less infrequently, including in-class reports ($n = 7$), project-based learning ($n = 4$), case studies ($n = 2$) that expose students to real-world technical problems, and product sharing ($n = 1$). This finding aligns with Zhang and Vieira's (2021) survey, which identified tutorials as the most commonly used method in translation technology teaching. However, some trainers ($n = 5$) argued that this should not be seen as a limitation, as undergraduate students typically require more guidance from trainers when first introduced to translation technologies (Su & Li, 2023). Although several trainers ($n = 7$) acknowledged that authentic project-based learning is among the most effective and favored approaches to delivering translation technologies, they noted that its implementation is constrained by limited resources and low levels of students' computer literacy. The limited use of case studies observed in the data aligns with Cui's (2021) findings, which highlighted a shortage of case-based approaches in translation technology teaching. This is likely attributable to restricted access to real-world projects and limited collaboration with language service providers.

Regarding assessment methods, six common approaches were identified in the data. The most frequently reported assessment method was the final exam ($n = 9$), which usually involved small-scale collaborative projects completed by student groups using CAT tools. Class assignments ($n = 7$) and group presentations ($n = 6$) were reported less frequently to check students' academic performance. Alternative methods, such as in-class tests on the application of CAT tools ($n = 2$), open-book exams ($n = 2$), and the use of online platforms to monitor learning progress ($n = 1$), were scarcely employed by the trainers. E-portfolios and situated tests were absent in the trainers' responses. It is evident that the interviewed trainers prefer traditional summative assessment over formative assessment, as noted by Wang and Zou (2022) in their study. However, summative assessment may hinder student motivation in learning translation technologies and limit the development of learner autonomy. It is also noteworthy that, although most trainers ($n = 10$) acknowledged the value and benefits of e-portfolios (Rico, 2017) and situated tests as formative assessments, they expressed concerns about their practical implementation. In particular, they noted that providing ongoing individualized feedback in large classes is time-intensive, especially within the constraints of a 32-hour course, and is further hindered by limited access to dedicated course management system platforms.

(e). Challenges and Recommendations

1. Insufficient Staff Provision

Insufficient staff provision emerged as the most pressing challenge emphasized by all trainers. This issue can be attributed to three main factors. First, translation technology is often not explicitly considered during the faculty hiring process. As a result, translator trainers, who lack technical backgrounds, familiarity with emerging technologies, and practical industry experience, are expected to learn translation technologies independently. Those with some prior exposure to translation technologies are typically assigned to teach the course. However, their limited expertise often hinders the design and delivery of effective training, as reflected in the pervasive negative self-assessments of their technological competence observed in this study. Second, several trainers ($n = 7$) reported that staff training programs in translation technology are expensive and lacking in depth. As one trainer (A08) remarked, "Online training courses in translation technology are often overpriced and superficial. And the expenses cannot be reimbursed by the institution." The combination of high costs, limited substantive content, and overly condensed live course durations (Ru, 2023) significantly diminishes trainers' motivation to pursue further training. Third, most trainers ($n = 11$) perceived the faculty promotion system in China's higher education as disadvantageous to those devoted to technological and practical translation sessions, as it disproportionately prioritizes theoretical research and publications. Under the dominant up-or-leave policy (Xu & Poole, 2024), where translation practice is seldom recognized as scholarly output

(Feng, 2023), trainers are often discouraged from investing in translation technology instruction. Over 85% of 306 translation trainers reported that translation works and unpublished translation practice hold little value in university assessment and promotion grading (Feng, 2023). Consequently, practical and technology-related teaching remains marginalized (Fu & Yuan, 2017), leading to limited faculty engagement in developing the translation technology courses.

In light of this issue, some trainers ($n = 4$) advocated for more accessible and cost-free retraining opportunities, suggesting that well-resourced universities should take the lead in sharing open and affordable online courses on translation technologies. Several interviewees ($n = 5$) also called for more inclusive and diversified evaluation criteria to reform the existing promotion system for translation faculty.

2. Course Isolation

Nearly all trainers ($n = 11$) cited the isolation of the translation technology course, pointing to insufficient coordination and collaboration between courses and trainers within the same program. Such isolation was also identified by Mellinger (2017), Kenny (2020), and Cui and Sun (2024) as the course is often delivered as a stand-alone module rather than within a comprehensive learning environment (Bowker, 2015). Instructors of other applied sessions often disregard translation technologies and do not encourage students to use them in assignments, largely due to their limited firsthand experience with standard translation workflows and a tendency to overstate the issues associated with these tools. While institutions in China grant trainers considerable autonomy over course content at the curriculum planning level, coordination among instructors remains limited. As one interviewee (A05) remarked, 'We can usually decide what to teach... But we don't work together on course content'.

Regarding this issue, some trainers ($n = 8$) proposed the development of a structured cluster of courses on translation technologies with extended training duration and increased credit weight. They suggested a progressive curricular design, beginning with general computer skills in the first year and advancing to the learning of specialized tools in subsequent years. Some trainers ($n = 3$) also highlighted the importance of teaching students how to assess translation tools critically. Furthermore, some trainers ($n = 7$) suggested that the translation program directors should promote the integration of translation technologies and tools into practical sessions to better expose students to emerging technologies and industry practices. However, several trainers ($n = 4$) felt less optimistic about the reform of curricula, citing institutional inflexibility, a challenge also noted by other researchers (Sánchez-Castany, 2023; Al-Dabbagh & Othman, 2024).

V. CONCLUSION

Designing and delivering effective undergraduate translation technology training are essential to prepare translation graduates that possess the technological competence required by the ever-evolving language services industry. This study adopted Kelly's (2005) translator training curricular design model as the research framework to explore how trainers perceive the design and delivery of undergraduate translation technology courses at 12 institutions in Shaanxi Province, China. The findings revealed that the most significant challenges in undergraduate translation technology training are insufficient staff provision and isolated technology integration, as these issues were consistently cited by the interviewed trainers. Hence, the current translation curricula should be reevaluated and updated to facilitate the comprehensive incorporation of translation technologies throughout the entire program.

It is necessary to consider the limitations inherent in this study. First, although Kelly's (2005) model adopted in this study provided a holistic framework for the investigation, the sample size, limited to twelve institutions in northwest China, may be considered small, which potentially limits the generalizability of the findings. Second, due to data collection constraints, this study relied solely on a qualitative approach and did not incorporate additional methods such as quantitative methods, classroom observation, or documentary analysis. This exclusive reliance on interviews introduces a degree of subjectivity, as the research process may be influenced by the researcher's own values (Greenbank, 2003) and is also susceptible to self-report bias on the part of interviewees.

It is hoped that the findings of the study will contribute to the improvement of undergraduate translation technology courses in China. The translator training curricular design model (Kelly, 2005) adopted in this study offers a comprehensive framework for designing and developing technology-based translation courses in comparable educational contexts. Future research could involve larger and more geographically diverse samples and use mixed methods to enhance the generalizability and robustness of the results. Additionally, investigating the factors that influence the acceptance and adoption of translation technologies among trainers and students would offer important contributions to the field.

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Probing Language Usage of Legal Cases in Indonesia's Social Media: A Study of Judgement

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Abstract—This study is qualitative research that will describe the indicators and targets of character and moral evaluation in legal cases of language usage in social media in Indonesia. The data of this research is in the form of language usage at the level of words, phrases, clauses, and sentences from social media which become evidence in legal cases in court order status or restorative justice from 18 jurisdictions in Indonesia. The approach used in this study is the attitude of judgment or character evaluation in appraisal theory, especially about personal and moral judgment. The indicator of personal judgments consists of criticism and moral/legal judgments that contain condemnation or blame. These indicators are expressed directly and implied through verbal, adjective, noun, and adverbial phrases, and metaphors. They reflected negative attitudes which are related to negative actions and behaviors, hatred, and fears directed towards individuals, groups or professionals, institutions or organizations, and situations as the evaluation targets. The findings of this study indicate a high use of criticism and condemnation towards others on Indonesian social media language crime. Overall, evidence of language crime on Indonesian social media can provide insights into societal attitudes and values that reflect moral degradation.

Index Terms—appraisal, legal case, social media, judgment

I. INTRODUCTION

The evolution and adaptation of language usage are constantly influenced by shifts in communication methods. Over the past ten years, information technology has been significantly altering the global communication landscape. The internet has catalyzed this transformation by modifying the style, structure, and approach of human interaction (Adebomi, 2024; Anjum & Katarya, 2024). This new epoch, as referred to by Crystal in Watt (2010), is characterized by written speech and spoken writing. It signifies a societal shift towards less direct communication, leading to a decline in social interaction (Chan, 2015).

One form of communication development resulting from the influence of popular internet technology is the rise of social media. Social media has become a new public space for people to interact (Hall, 2018; van Dijck & Poell, 2015) and a buzzword in many fields. Various social media platforms have sprung up with various variations of features tailored to the needs of their users. Kaplan and Haenlein (2010) distinguish social media into 5 types, namely (1) social networks, (2) discussion media, (3) publication media, (4) connected networked games, and (5) media for sharing works. In addition, there are other categories of social media, such as virtual worlds, live streams, MMOs, live casts, and microblogs. These various forms of social media are in high demand and are used by people with diverse interests to suit their needs. Social media provides flexibility and personalized platforms for people to connect with others (Girardin et al., 2020; Hallinan & Brubaker, 2021). In fact, modern humans use more language on social media than in their real lives (Seargeant & Tagg, 2014). The intensity of language usage on social media is illustrated in this chart.

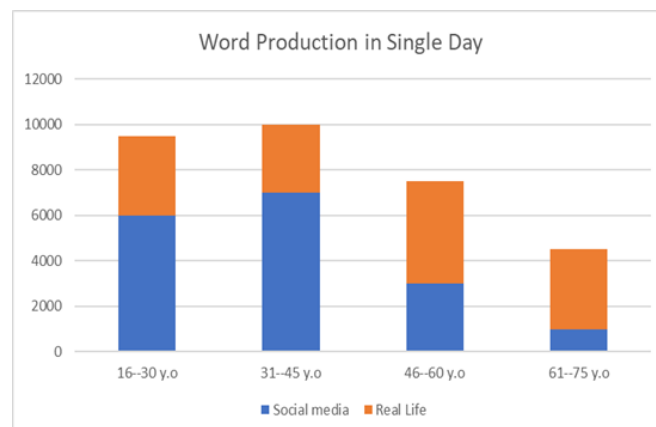


Figure 1. World Production in Single Day (Seargeant & Tagg, 2014)

It is estimated that humans produce 7,000 to 12,000 words per day. In that case, figure 1 shows that during their productive years, they have shifted their communication time from the real world to social media (Seargeant et al., 2023). Unfortunately, this high intensity of interaction on social media has consequences, including the rise of legal cases related to language use.

The frequent use of language on social media has the same inherent effects as in real-world interactions. People can express their ideas and attitudes as if they were communicating directly in the real world, in a straightforward and expressive manner (Segado-Boj & Díaz-Campo, 2020; Wang et al., 2021). However, this freedom is not always used wisely by the user community. They often use language that has the potential to create conflict, sometimes leading to legal consequences (Kearns et al., 2023; Matamoros-Fernández & Farkas, 2021). They share comments, criticisms, ideas, and jokes that may contain emotional and negative elements, which could cause others to feel morally or materially harmed. Fraud, bullying, sexual harassment, and hate speech have merely shifted platforms—from the real world to the virtual one—with potentially even more destructive consequences. Crockett in Neumann and Rhodes (2024) stated that there are arguments suggesting digital media may amplify expressions of outrage and moral emotions.

The widespread accessibility and use of social media platforms in Indonesia also have created fertile ground for the dissemination of hateful content. Since the ITE (*Informasi dan Transaksi Elektronik* ‘Information and Electronic Transactions’) Law was issued, cases related to hate speech in Indonesia have tended to increase yearly (Nuraflah et al., 2021). With millions of users sharing their thoughts and opinions online, the potential for hateful messages to be circulated rapidly and widely has increased significantly. While social media should facilitate public discourse, some users exploit these platforms to spread false information and attack others (Putra et al., 2023). The spread of hate speech and racism on social media is influenced by socio-political situations and technological advancements (Amin et al., 2018). Additionally, the ITE Law provides legal frameworks for prosecuting individuals who disseminate harmful content online, including hate speech. This has empowered authorities to act against those who violate the law, leading to a rise in reported and prosecuted cases.

Legal cases of language usage through social media in Indonesia are one of the crimes committed by abusing the sophistication of internet technology. The ongoing discussions and efforts to combat hate speech in Indonesia have been proposed several techniques for detecting hate speech, such as bidirectional long-short-term memory and word2vec extraction (Isnain et al., 2020). This study utilizes the richness of attitudes and peculiarities in the use of language in legal cases on social media (hereon abbreviated to LLCs) as a research target. It investigates the attitudinal evaluation conveyed through word choice and metaphors employed by users that can exacerbate tensions and lead to legal disputes. The study focuses on the attitudinal aspect of judgment which is explored with the appraisal approach (Martin & Rose, 2003; Martin & White, 2005). It analyzes how a text conveys positive or negative judgments, how the intensity or directness of those attitudinal expressions is reinforced or weakened, and how the speaker/writer engages dialogically with previous speakers or potential respondents to current propositions (Martin & White, 2005). As McEachrane (2009) stated, in this approach, emotions are caused by appraisals as evaluative judgments.

Judgment is the normative evaluation of human attitudes about rules or conventions of behavior. This is one of the aspects of attitudes proposed by Martin and Rose (2003), namely judgment or evaluation of people’s character. In other words, judgment relates to ethics, religion, morals, legal rules, or other unwritten rules. Judgment involves evaluating whether something is legal/illegal, moral/immoral, polite/uncivil, etc. Furthermore, judgment can be divided into two, namely personal judgment and moral judgment. Personal judgment is a normative judgment that is not related to legality in law. Personal judgment consists of positive judgment or admiration and negative judgment or criticism. Moral judgment relates to normative judgments that are related to legality in law. Moral judgment consists of positive judgment or praise and negative judgment or condemnation (Martin & White, 2005).

Judgment can be expressed either overtly or covertly, based on the manifestation of its form (congruence). Judgments communicated indirectly are categorized into uncommon activities that symbolize feelings, such as alterations in tone and body language (extraordinary behavior) and metaphors. As per Martin and Rose (2003), within a discourse or text, the attitude is manifested through four different focal points: adjectives (intensifiers), attitudinal vocabulary, profanity, and metaphor. When attitudes are conveyed via the usage of adjectives, attitudinal language, and cursing, the appraisal of attitudes is stated explicitly. When metaphors are employed to articulate attitudes, it signifies that a suggested or indirect assessment is provided. This implies that through the utilization of these four focal points of attitude, the evaluation of attitude can be scrutinized.

Several studies have examined cases of language usage in social media. With a legal approach, for example, Ali (2020) has explored language crimes such as bribery, perjury, defamation, incitement, threatening, and conspiracy. These crimes require good competence in pragmatics. Ali analyses the criminality of language by focusing on speech acts. However, Ali realizes that this is an interdisciplinary field, as his analysis relies on a variety of different fields: (critical) discourse analysis, pragmatics, stylistics, conversation analysis, phonetics, phonology, sociology, syntax, semantics, and law, among others. Previously, a study on forensic linguistics was also conducted by Correa (2013). This paper presents a summary of some of the most famous and publicly discussed legal cases and outlines the intersection between applied linguistics (especially pragmatics, discourse analysis, and sociolinguistics) and forensic law. Correa breaks it down into three interrelated areas: (1) language as a medium of communication between law enforcement and suspects/witnesses or as a medium of legal argumentation in the courtroom, (2) language in legal products (issues of clarity, interpretation, and

language construction of legal products), and (3) language crimes and linguistic evidence (their use, validity, and reliability in the trial context). However, there are still a few forensic linguistic studies that use the appraisal approach. There are Hurt and Grant (2019) who use the appraisal subsystem in appraisal analysis. This research compares realized and unrealized 'pledges to harm', which sometimes reveals patterns that are counterintuitive to the writer/speaker. For example, unrealized texts are procedurally crueler and more threatening, while realized promises/threats are more ethical. In such texts, some markers may begin to explain which actions the threatener may take in the future.

Based on the above description, this research explores the attitudinal aspects of judgment with an appraisal approach. It aims to explore character and moral judgments based on divisions related to personal judgment and laws or norms. In this research, both aspects are studied considering that violations of formal law indirectly also violate personal ethics and norms.

II. METHOD

The focus of this study is on examining the utilization of LLCS within the Indonesian context. A qualitative approach aligns with the research methodology, as it allows for the exploration of knowledge claims primarily rooted in constructivist perspectives, which emphasize the multifaceted nature of individual experiences and socially and historically constructed meanings. This approach also incorporates advocacy and participatory perspectives, which are politically and collaboratively oriented towards problem-solving or effecting change (Creswell & Creswell, 2018). Employing investigative strategies such as narratives and case studies, researchers aim to gather emergent open data with the primary objective of identifying thematic patterns within the dataset. Hence, qualitative descriptive methods are employed to delve into personal and moral attitudes as reflected in LLCS.

The variable of this research is the use of language in legal cases. Therefore, the qualitative descriptive method is used in the research of character and morals reflected in LLCS. The study used a qualitative method to describe data, characteristics, and relationships of phenomena systematically, factually, and accurately within a limited period (Moleong, 2019). A purposive sampling technique or criterion-based sampling was used in this study. Purposive sampling techniques are adopted to ensure the collection of comprehensive and in-depth data (Cash et al., 2022). It is adapted to the characteristics of the data in this study which are limited to attitude lexis and metaphors that reflect the attitude of judgment found in LLCS. The use of this sampling technique aims to obtain the completeness and depth of data in dealing with the existing reality. Thus, there is no attempt to generalize to the population, but rather an effort to obtain a more in-depth study in a particular context (Sutopo, 2006), namely the use of language in legal cases on social media.

The observation technique is carried out for data collection, namely through listening and recording every LLCS related to character evaluation, morals, and context. The results of the acquisition were then selected as data sources and data according to the number and criteria needed. The data came from 32 data on cases of language usage in mass media from various regions obtained from 18 police resorts in Indonesia. Then, the data is determined by combing through each use of language in each case. These cases can be in the *inkracht* stage (binding and cannot be appealed), up in the prosecutor's office, investigation, complaint, or restorative justice.

This research uses a content analysis technique by using a language usage theory approach for data analysis. Furthermore, the data analysis technique uses four stages in qualitative research proposed by Spradley (1997). The first stage is domain analysis, which identifies the linguistic units of LLCS that reflect moral attitudes. Each aspect of moral attitude found in the data was numbered. The numbering of the data was based on the case number and the sequence number of the attitude in the case in question if more than one aspect of attitude was found in one case. The second stage is taxonomic analysis, which is the classification of data based on the type, target, and indicators. The next stage is componential analysis, which explores the relationship between the types of attitudes, indicators, and targets of moral attitudes found in the use of language on social media. The last stage is cultural theme analysis, which is finding a general description of the findings associated with the characteristics of the data and data sources.

III. DISCUSSION

This study has three objectives, namely (1) to describe the aspects of attitudes that reflect character and morals in the LLCS, (2) to describe the targets and indicators of attitudes that reflect character and morals in the LLCS, and (3) to describe the relationship between targets and indicators of attitudes that reflect character and morals in the LLCS. The findings of this study are described in the following subsections.

Aspects of judgment were found in 80 LLCS data with almost all of them using negative polarity, namely negative personal judgment or criticism, and negative moral judgment or condemnation. The following is the distribution of attitude types based on judgment evaluation in this study.

TABLE 1
DISTRIBUTION OF JUDGMENT

No.	Attitude Congruency	Criticism	Condemnation	Total
1.	Direct	5, 6, 11, 12, 13, 16, 17, 18, 40, 42, 45, 51, 19, 20, 21, 29, 39, 41, 46, 47, 48, 50, 54, 56, 59, 60, 61, 63, 64, 65, 67, 71, 72, 80	1, 2, 4, 7, 8, 15, 24, 26, 27, 28, 32, 35, 37, 38, 55, 57, 58, 62, 73, 74, 75, 76, 77, 78, 79	59
2.	Implied	3, 9, 10, 22, 23, 30, 31, 34, 36, 43, 44, 49, 52, 53, 66, 68, 70	14, 25, 33, 69	21
Total		51	29	80

The data for this study is a collection of clauses containing attitude lexis or metaphors that indicate character and moral judgments. This means that when a clause is declared as data, there are linguistic indicators in the form of attitudes that are used to determine the presence or absence of this indicator.

A. Negative Personal Evaluation (Criticism)

Criticism is a form of negative personal evaluation. Fifty-one condemnation data were found in this study, both direct and implied. Direct criticism is built up from the use of verbal phrases, nominal phrases, adjective phrases, and metaphors. They become indicators that mark the criticism evaluation.

The data results show that attitude lexis in the form of verbal phrases dominates the indicators in LLCS. This dominant use of verbal phrases indicates the target of the assessment aimed at the behavior of the participants in the text. There are fourteen verbal phrases found in this evaluation, namely *berfoya-foya* 'splurging', *kebanyakan ngeroom* 'booking motel excessively', *dijajni-janjikan doang* 'empty promises', *rebut pacar orang* 'grabbing people's girlfriend', *kerjanya cuma main saja* 'faithless' (50), *berganti-ganti suami* 'constantly divorcing', *manusia tidak bertanggung jawab* 'irresponsible human', *bermasalah* 'problematic', *hasil nipu* 'illegal income', *ga bayar di mana-mana* 'debtor', *ngaku jabatan tinggi* 'claiming high positions', *temen dijelek-jelekin* 'demonizing friend', and *tidak ada iktikad membayar* 'no intention of paying'.

Of the fifty-one data, there were only a few data with indicators that were not verbs or verb phrases. There are five indicators in nominal phrases, those are *pelacur* 'sluttish' (11, 21, 45), *lonte* 'sluttish' (12, 18, 42, 51), *pelakor* 'steal someone's partner' (17, 40), *WIL (Wanita Idaman Lain)* 'other women' (41), *anak lonte* 'sluttish child' (71), *germo* 'procurer' (72), which are indicators of negative character evaluation. Then, there are nine adjective phrases, namely *banyak utang* 'have much debt' (5), *mata duitan* 'money oriented' (13), *biadab* 'savage' (16), *amoral* 'immoral' (19), *marah-marah* 'angry' (39), *ga malu* 'no shame' (48), *ga punya malu* 'no shame' (46), *gak puas sama satu laki* 'not satisfied with one partner' (56), *suami gonta-ganti* 'changing partner' (61). These attitude lexes are indicators of negative character assessment in the context of the language used in online media, specifically social and moral condemnation of the person's actions.

The use of the attitude lexis above to describe the negative behaviors of the target in LLCS can be seen in the following example.

- (1) *Bukalah seragam kalian itu, Aparat Keparat! Di balik itu kalian tidak lebih dari Kacung! Tanpa seragam dari uang kami, apa kalian itu berani sebiadap itu?* 'Open your uniforms, you bastards! Underneath you are nothing more than Kacung! Without uniforms from our money, do you dare to be that brave?' (data 16).
- (2) *Dapurane tok lugu, njerone bajingan, ga lama neruske profesi bapake jadi germo* 'Pretending to be innocence outside, behaving like a bastard inside, it won't take long until he becomes like his father as pimp.' (data 8)

In examples (1) and (2), negative personal judgments are shown through verb phrases *berani sebiadap itu* 'dare to be that brave' and *neruske profesi bapake jadi germo* 'like his father as a pimp.' This negative character evaluation is directed at the police profession and individuals. The verb phrases indicate a negative behavioural evaluation of those who are the targets or objects of judgment.

In addition, the use of metaphors also colors the negative character assessment. The phrases use metaphorical meanings, such as *gatel* which means 'flirtatious' (3), *ngga ada otak* 'stupid' (9), *tidak tahu diri* 'presumptuous' (10), *miskin harga diri* 'undignified' (22), *mau lobangnya doank* (23), *perempuan murahan* 'prostitute' (30), *harga diri lo murah* 'uncivilized' (31), *banyak akal bulus* 'cunning' (34), *genderang perang dimulai* (war drums started) 'declare war' (36), *nganggo tameng* 'using a shield' (43), *wanita simpanan* 'mistress' (44), *mangkal* 'prostitute' (49), *murahan* 'flirtatious' (52), *berkedok hijab* (under the guise of hijab) (53), *temen direndahkan* 'arrogant' (66), *orang sakit* 'crazy' (68), *di dalam perutmu ada uang dari saya* (in your stomach there is money from me) 'stealing' (70). Indirect judgment in this study can be seen from the use of untrue meaning (metaphor) in the language aspect that shows the judgment of condemnation.

Twenty-nine indirect or implied assessment data in this study show negative character evaluation in LLCS, as seen in the following examples (3) and (4),

- (3) *Inget mbak di dalam perutmu ada uang komisi dari saya* 'Remember, in your stomach there is commission money from me.'
- (4) *Sorry aku nganggo tameng kowe* 'Sorry for using you as a shield.' (data 51)

In examples (3) and (4) personal judgment is characterized using adverbial phrases and verb phrases. The implicit negative character indicator in example (3) is *di dalam perutmu ada uang komisi dari saya* 'in your stomach there is commission money from me'. Adverbial phrases are used to criticize others who have taken away their rights. This means

that there is indirect personal criticism implied using the phrase. In example (4), negative character evaluation can be seen in the phrase *nganggo tameng kowe*. There is a negative character evaluation expressed from the use of the verb phrase, which implies an undesirable activity, namely using other people as blame-shifters. From examples (1), (2), (3), and (4), it can be drawn that negative character evaluation leads to the behavior of targets and perpetrators who are considered to violate ethics. The targets and perpetrators in question are individual parties.

B. Negative Moral Evaluation (Condemnation)

The condemnation represents a form of assessment of violations of social or legal norms. This means that there are sanctions, either social or legal, given for the negative behavior. In this study, there are twenty-nine data marked with attitudinal lexis and metaphors that show moral judgment or condemnation.

The use of indicators on moral judgment is realized in verbal and nominal phrases. From the data, it can be seen that verbal phrases dominate the indicator. For example, *selingkuh* 'cheating' (1, 55), *tidak mau membayar utang* 'do not want to pay the debts' (4), *berselingkuh* 'have an affair' (15), *dirampok* 'being robbed' (24), *surat saja bisa dipalsukan* 'even letter can be forged' (28), *polisi, asu, cari duit* 'police who only looks for money' (32), *tidak bayar hutang* 'do not pay the debts' (35), *hutang lari* 'do not want to pay money' (37), *ga pernah mau bayar* 'do not want to pay debts' (38), *ditipu* 'being cheated' (57), *nggelapna duit* 'embezzle money' (73), *diperas* 'being blackmailed' (75), *kena tipu* 'being deceived' (76), *mencoba kabur* 'trying to escape' (78), *melarikan diri* 'trying to escape' (79). Then, there are four nominal phrases and one adverbial phrase which are also found in LLCS, namely *peselingkuh bangsat* 'cheater' (2), *pembohong* 'liar' (7), *pendusta* 'liar' (8), *penipu* 'cheater' (26, 27, 62, 74), *maling* 'thief' (77), and for adverb phrases, there is *demi nafsu* 'for lust' (58).

The use of attitude lexis above marks the judgment of direct blame, as seen in the following example of moral evaluation.

(5) *Hidup kok hasil nipu-nipu duit nasabah to mbak, mbak. Ngisin-ngisini perawatan ga bayar dimana-mana* 'Such a shame that you live from fraud money you got from your customers.'

(6) *kuwi to wonge...seng wedok tau nggelapne duit arisan online* 'So that's the person... the woman once did an online fraud.' (data 40)

The phrases *nipu-nipu duit nasabah* 'stealing customer money' and *tau nggelapne duit arisan online* 'ever embezzled online rotating savings money' is an indicator of negative assessment in examples (5) and (6). Negative assessments, which are marked by violations of legal norms, can be seen in the data and are aimed at bank employees and online managers who commit fraud. Fraud itself, in the realm of law, is a form of violation. The negative assessment of acts of corruption also refers to the perpetrators of corruption.

Then, judgments with indirect or implied blame were found in four data. The norm judgments are indirectly aimed at the negative behavior of people who use their profession for personal gain, as can be seen in the following examples.

(7) *tanah kami dirampok pp property mafia tanah* 'our land was robbed by the police and land mafia'.

In addition to the direct indicators of negative moral evaluation of *merampok* 'robbing', the indicator of the attitude of indirect condemnation in example (7) is the word *mafia tanah* 'land mafia'. The negative attitude assessment is addressed to a property company that is indicated to have seized the perpetrator's land. The negative judgment shows a negative attitude of blame towards the party that is robbing (*merampok*). The term *mafia tanah* is a metaphorical expression that means a group of people who work together to illegally own or control land belonging to others. In legal norms, the act is a form of violation of the law and morally the act also shows negative actions.

(8) *Dasar Kepala Desa mata duitan. Uang hak masyarakat pun dimakan* 'The village head is a vulture. The community's rightful money was eaten.'

The metaphorical forms of *mata duitan* 'a vulture' and *hak masyarakat pun dimakan* 'The community's rightful money was eaten' are indicators of negative judgment in example (8). However, what is an indirect indicator of moral evaluation is that *hak Masyarakat pun dimakan*. The negative moral judgment is aimed at the village head who committed corruption. The clause *hak Masyarakat pun dimakan* is a metaphorical 'the village head is a vulture'. The community's rightful money was eaten expression that shows the behavior of taking funds for the community for one's interests. By legal norms, the act is a form of violation of the law and morally the act also shows negative actions.

The examples above show moral judgment detected through violations of legal norms. These negative behaviors are indicated to be carried out by people from groups or ranks that have greater authority than ordinary people.

The investigation into moral perspectives in this research engages appraisal assessments centered on targeted actions that conflict with personal character and societal standards or morality. It implies that the researcher pays more attention to scrutinizing the sentiments and conduct of participants who manifest viewpoints about appraisal utilizing the theory of appraisal. Generally, adverse moral perspectives target characteristics that run counter to the personality, norms, ethics, and laws typically upheld by humans. Moreover, the evaluation is directed towards the caliber of participants who fail to fulfill anticipations and preferred situations. This study explores the attitudes and behaviors of the participants seen from the appraisal approach as it provides assessments, intensity, or directness for an attitude in the use of language (White, 2000).

The results of the study on LLCS show that explicit or direct indicators of moral attitudes are found in the data. This means that direct or explicit evaluation is stated by the text producer or actor by using more straightforward expressions of judgment. In this finding, the direct condemnation assessment is a negative personal judgment conveyed through the

use of attitude lexis in the form of verb, adjective, and noun phrases. This shows the dominance of emotion caused by judgment evaluation in the appraisal system (McEachrane, 2009).

Then, implied judgment is found in less than a third of the data. Implied moral attitudes are characterized by showing more concrete evaluations of attitudes. This means that the stylistic effects of the language used here can show more real hatred. Of course, this implicit stance contrasts with the explicit stance, where writers/speakers use metaphors to convey their emotions (Kareem & Farhan, 2022). The lack of evaluation of implicit attitudes in this study indicates limited knowledge about the use of metaphors. The use of metaphors shows an attempt to reinforce the author's attitude as a text producer. In addition, there are stylistic effects of the language used by metaphors, idioms, and stylistics that are known by social media users, especially those related to negative attitudes and morals.

The target profile, which is the realization of the character, attitude, and behavior of the participants assessed in LLCS, is quite varied. The assessment evaluation in this study is aimed at many parties. The parties in question are individuals, professions, groups, and certain organizations. The targets of attitude evaluation in LLCS include people (friends, co-workers, businesses, etc.), and something that is considered human or object, for example, from professions there are police, civil servants, village heads, bank employees, online gambling managers; from community groups, there is the land mafia, and from organizations there is PERADI (*Perhimpunan Advokat Indonesia* 'Indonesian Advocates Association'). As stated by White (2015), the evaluated character can be sourced from various backgrounds and knowledge as part of the phenomenon (entity, event, or situation).

By looking at each type of assessment individually, the negative attitude assessment in LLCS is dominated by expressions of hatred or anger. This indicates that there is a high degree of conflict or incompatibility between the perpetrator and these targets. The expressions of condemnation that realize these personal judgments focus on participants' behavior related to ethical violations. This dominance trumps the use of moral and legal variables as aspects of attitude assessment. Here, social media users appear to focus on evaluating participants' behaviors that violate the moral and legal parameters that affect their lives. They may display behaviors and attitudes that are harmful or disruptive to others, such as aggression, deception, and disregard for the rights and welfare of others. They may also have characters characterized by a lack of empathy, morals/conscience, or self-control. All examples show moral judgment detected through violations of legal norms. These negative behaviors are indicated by people from groups or ranks in positions of authority. These negative behaviors arise because they have greater power and control over others. This is related to the reality on the ground that shows so many facts of violations related to moral and legal issues that show poor expression of anger and other moral emotions (Neumann & Rhodes, 2024).

Language on social media, especially related to LLCS, also shows the expression of attitudes that show the communication patterns and social degradation of social media users. Various attitudes that arise in the use of language on social media show the negative behaviors and attitudes of the user community. These attitudes are influenced by situations, conditions, and communication patterns. Generally, negative moral attitudes are aimed at traits that are contrary to the character, norms, ethics, and rules of law owned by society in general. It is contact with immoral, unethical, bad, evil, and despicable acts committed by individuals, groups, or institutions through social media that may have an impact on the moral behaviors, judgment, reasoning, intuition, emotions, and views of users, especially in digital society, beyond those seen in other forms of communication (Gabriels & De Backer, 2016). Thus, evaluations are aimed at target behaviors and characters that do not match the expectations and desires of the perpetrator. However, many factors can contribute to criminal behaviors on social media, including environmental (exposure to criminal content, lack of digital literacy, poverty, limited opportunities, and social exclusion), social (peer pressure and online influences, cyberbullying and online harassment, lack of social support), and psychological factors (mental health conditions, low self-esteem and need for validation, impulsivity, and lack of emotional control).

IV. CONCLUSION

The study on the evaluation of LLCS shows personal judgment criticism as well as moral/legal judgment or condemnation. These negative attitudinal aspects are related to attitudes, behaviors, fears, and undesirable conditions. In this study, the overall object of attitude evaluation in LLCS includes participants in the form of individuals (friends, colleagues, businesses, etc.), professional persons, and organizations. These targets are parties that are considered to have behaviors and characters that are contrary to norms, ethics, and laws. Then, the indicators of attitude evaluation in this study are all attitude lexis that shows the behavior and quality of the attitude target. In general, these attitudinal lexes are lexis, phrases, and metaphors that show all behaviors and traits that are by or contrary to the norms, ethics, and laws that apply in society in general.

For the task of social media as a channel for socializing and sharing information to be carried out properly, there needs to be a balance of attitude evaluations from various sides or parties, especially on statements related to sensitive issues, such as political events, etc. This means that positive and negative attitude evaluations must be used equally to evaluate the intended party. In this study the author's assumptions and conjectures related to knowledge and understanding play a role in describing the research results. Therefore, the author suggests that future studies also reveal opinions or reasons from two sides, namely the author and the target of the attitude, as well as from legal experts about a case of language usage on social media. Therefore, understanding these complexities is important to prevent and handle criminal acts on social media and to develop more effective strategies to create safer online communication.

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The Linguistic Representation of Bullying in the Animated Series "Our Family Life": A Semiotic Analytical Study

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Abstract—This study seeks to analyze the linguistic representation of bullying in the Jordanian animated series *Hayat Ailtana* (Our Family Life), focusing on how dialogue in the local Jordanian dialect, alongside accompanying semiotic elements, shapes children's understanding of bullying discourse. The study is grounded in the premise that language in animated texts functions not merely as surface communication but as a symbolic tool for constructing authority and social relationships. To achieve these objectives, this study employs a combined interpretive analytical approach, drawing on both critical discourse analysis and social semiotic analysis. Dialogues and visual contexts from three selected episodes of the series were deconstructed, with vocabulary and expressions related to bullying systematically coded, and rhetorical styles and dialect carefully examined. The results indicate that bullying in the series is portrayed as a multidimensional and interactive discourse, encompassing behaviors from digital fabrication to subtle social exclusion and ideological verbal abuse. The study further highlights the role of spoken language in either reinforcing dominance or challenging aggressive behavior, underscoring the significance of animation as a cultural and educational medium that fosters behavioral and moral awareness among Arab children.

Index Terms—bullying, cartoon discourse, critical discourse analysis, semiotics, digital exclusion

I. INTRODUCTION

Animation is a powerful medium in shaping the behavioral and linguistic awareness of children and adolescents, blending entertainment with educational guidance through engaging storytelling, visually appealing design, and symbolic sound effects. As bullying becomes increasingly prevalent in school and family settings, it is now understood not merely as overt aggressive behavior but as a linguistic and cultural discourse. This discourse encompasses everyday interactions and symbolic situations with psychological and semiotic dimensions that influence the dynamics of childhood relationships and the construction of self and other (Piotrowski & Vodanovich, 2020).

Educational and media research indicates that the language used in children's media—particularly cartoons—plays a significant role in reinforcing prevailing social concepts and patterns of thought. This is especially true when the language incorporates local dialects and culturally rich expressions imbued with emotional meaning. According to, analyzing cartoon dialogues offers a crucial lens for understanding how power, discrimination, belonging, and justice are represented in texts aimed at young audiences. This underscores the importance of studying bullying language as a reflection of social relations and the positioning of individuals within those dynamics.

In this context, the series *Hayat Ailtana* (Our Family Life) stands out as a distinguished Arab educational model addressing the issue of bullying. It utilizes dialogue in the local Jordanian dialect and features short stories that reflect school and family situations familiar to Arab children. This approach emphasizes the psychological and social tensions underlying various forms of bullying, including verbal, social, emotional, and electronic. The series is among the few Arab productions that employ language not merely as superficial communication but as a tool for behavioral and value analysis (Digitales Media, 2022).

Building on this foundation, the study operates on the premise that language used in the dialogues of *Our Family Life* transcends mere surface-level expression, constituting a symbolic and culturally embedded discourse. This discourse can be analyzed semiotically to uncover its deeper structural, psychological, and social functions. The research employs a comprehensive interpretive methodology, combining tools from critical discourse analysis and semiotic analysis of

dialogue. Three selected episodes are examined, with dialogues deconstructed and transcribed; vocabulary and expressions related to bullying are systematically coded, and rhetorical styles and tones are analyzed to explore how the bully's authority is constructed, the victim's position is defined, and resistance or response mechanisms are articulated within a semantic system. The influence of this discourse extends to shaping children's perceptions and everyday behavioral norms.

Given the rarity of such initiatives in the Arabic-speaking world, the Jordanian animated series *Our Family Life* stands out as a unique artistic and educational endeavor. Presented in the Jordanian colloquial dialect, the series addresses all forms of bullying—verbal, psychological, social, and cyber—through dramatic scenes and authentic conversations that reflect Arab school and family realities. While bullying has been widely studied from psychological and educational perspectives, the linguistic representation of bullying in Arabic animated cartoons has yet to be thoroughly examined through interpretive and semiotic analysis, which can reveal how bullying discourse is constructed through idioms, dialects, vocabulary, tone, and character interactions.

This study is grounded in the assumption that the language used in the dialogues of *Our Family Life* extends beyond mere expression of attitudes, functioning as a symbolically and culturally charged discourse. Such discourse can be examined semiotically to uncover its underlying structures and its psychological and social motivations. The research employs a mixed interpretive methodology, integrating critical discourse analysis and semiotic examination of dialogic texts. The analysis of selected episodes involves transcription and coding of dialogue, identification of bullying-related vocabulary and expressions, and an exploration of argumentation strategies and dialect use.

Therefore, the central research questions are as follows:

- How does the dialogue in *Our Family Life*—in its words and tones and in its forms of argument in the local Jordanian dialect of Arabic—supplement the portrayal of childhood bullying?
- How effective is this linguistic representation in enhancing educational values and rejecting bullying among the Arab cultural group?

Theoretically, this study is grounded in the premise that language in animated cartoon dialogues functions not merely as a communication tool but as a complex semiotic and cultural medium that shapes children's perceptions of concepts related to aggression—such as bullying, victimhood, and confrontation. Consequently, analyzing the verbal and visual discourse in selected episodes of *Our Family Life* through this integrated framework provides valuable insights into how power dynamics and social relationships are negotiated within cartoons.

II. LITERATURE REVIEW

A. Previous Studies

In recent years, scholarly interest has grown in examining how cartoons depict the social issue of bullying, with particular attention to the linguistic and semantic strategies that shape, frame, and convey the discourse around bullying in ways that influence children's and adolescents' cultural understanding and behavioral responses. Research in this area adopts a range of methodological approaches, encompassing visual-narrative, linguistic-semiotic, and critical perspectives.

In this context, Park et al. (2019) investigated whether the visual design of animated characters influences children's emotional empathy. Their study compared three 3D animation styles—realistic, simplified, and iconic—and found that while visual form plays a role, it is not the decisive factor in eliciting emotional responses. Instead, narrative and dialogue emerged as the primary drivers of emotional impact. These findings align with the present study's assertion that language is central to how bullying is represented and addressed.

Smith et al. focus on the use of specific terms denoting bullying, noting that such words—for example, “bullying” in English and “ijime” in Japanese—may carry different semantic associations due to cultural variations (see Strick et al., 2016). Their research indicates that direct translation can dilute the nuanced understanding of bullying, and that interpreting portrayals of the issue requires both linguistic and semiotic analysis, particularly when examining Western media texts. The study also highlights the role of context, demonstrating how multicultural educational cartoons—and, in this case, the use of the Jordanian dialect—shape meaning-making and interpretation.

Supporting these findings, Sittichai and Smith (2015) compared representations of bullying in animated content from Thailand and the UK, revealing that sarcasm and linguistic exclusion are expressed similarly across cultures. Their study also demonstrated that children's responses were influenced as much by the context and tone of the dialogue as by the overall visual style.

In light of these studies, it is clear that in animated programs, language serves as more than just a performative element for entertainment; its semiotic and social functions significantly shape how children understand the world—including social relationships, aggression, and cultural identity. These findings support the methodological approach of the present article, which examines bullying language as a symbolic structure with both semiotic and pedagogical dimensions. This is exemplified in *Our Family Life*, the sole Arab production addressing this issue through locally grounded discourse tailored specifically for Arab children.

B. The Animated Series “*Our Family Life*”

Our Family Life is one of the largest and most comprehensive digital initiatives in the Arab world, seamlessly combining entertainment with family-oriented and educational guidance. It is fully managed by the Digitales Media team,

a group of specialists in developing Arabic social and educational content. The project operates across multiple media platforms, with its flagship being the *Our Family Life* YouTube channel, which has garnered over 2 million subscribers and more than 609 million views to date. The project's website also attracts an average of 60,000 monthly visits, underscoring its wide reach and significant standing within the Arab family digital media landscape (Digitales Media, 2022).

The animated series *Abo Sanad's Family* serves as the project's central visual and interactive component. Featuring two-dimensional characters set against three-dimensional backgrounds, it achieves a distinctive hybrid aesthetic with strong visual appeal. The series has been commended for addressing timely and significant social topics, including parenting, family dynamics, mental health, bullying, and social interaction. These themes are presented through casual yet thoughtful and reflective conversations (Our Family Life, 2020).

The project stands out for its blend of entertainment and social engagement, tackling complex and sensitive topics such as harassment, grief, discrimination, and girls' education. These issues are explored through targeted awareness campaigns and short films. Its strength lies in a multidisciplinary team of editors and writers, including psychologists, educators, journalists, and early childhood specialists, whose deep understanding of the modern Arab family informs the creation of rich, relevant, and intellectually engaging content tailored to the region.

According to its creators, the project aims to support parents and families in their educational journey by equipping them with tools to foster healthy, confident, and meaningful conversations, particularly at a time when such dialogue is more crucial than ever. It represents a progressive Arab model of participatory educational digital media, combining storytelling, social analysis, and multimedia content to address pressing family and community issues.

The show employs a mixed-media animation style, combining realistic background images depicting everyday life in Jordan—such as schools, homes, and streets—with digitally illustrated characters featuring authentic Arab traits. This approach fosters a stronger visual and emotional connection with the audience while serving as an effective medium for delivering behavioral and educational messages. Produced in the colloquial Jordanian dialect, the series ensures that its language resonates naturally with its intended viewers. Each episode runs for 4–7 minutes and concludes with an “Awareness Details” segment, presenting factual insights designed to encourage young audiences to think critically about their surroundings.

The media series is a contemporary educational production that promotes core values such as respect, inclusion, and citizenship. It engages children not only through direct instruction but also by involving them in the process of developing ethical standards. The series has earned the support of both local and international educational and social organizations and has been incorporated into field-learning programs across several schools in Jordan as a complementary educational resource (UNICEF, 2022).

C. Linguistic Representation of Bullying in Animated Media

Bullying is a multifaceted behavior that has significant negative effects on children's psychological well-being and social functioning. It is defined as aggressive behavior—or a pattern of behaviors—perpetrated by an individual or group against a child who is unable to defend themselves from the abuse (Olweus, 1993). Bullying manifests in various forms, including physical acts such as pushing and hitting; verbal acts such as mocking or insulting; social acts such as exclusion and defamation; and cyberbullying, which involves harassment and stalking via the Internet. UNESCO reports indicate that over one-third of students globally experience bullying at some stage of their development, with lasting psychological and behavioral consequences (UNESCO, 2019).

Psychological research often attributes bullying behavior to environments characterized by emotional instability, weak social bonds, or discrimination based on differences. Children who experience bullying frequently exhibit anxiety, low self-esteem, school avoidance, and various conduct disorders. Neuropsychological studies further reveal that prolonged exposure to bullying during childhood can lead to irreversible changes in brain function, notably hyperactivation of the amygdala in response to social threats (Rigby, 2017).

In this context, as with other visual media, animated content has been both praised as an educational tool capable of raising awareness about the dangers of bullying and criticized for potentially perpetuating and reinforcing bullying behaviors through careless portrayals. Language plays a central role in representing bullying, with dialogue often employing strong, mocking, and exaggeratedly sarcastic expressions that reflect cycles of discrimination and domination. Research suggests that children, as highly adept imitators, may internalize these aggressive speech patterns and incorporate them into their daily interactions.

Conversely, well-designed animated materials that are linguistically and educationally crafted can serve as powerful tools for modeling positive conflict resolution, emotional awareness, and resistance to bullying. For example, the Arthur episode “So Funny I Forgot to Laugh” addresses verbal bullying in a straightforward yet effective way, using humor to navigate the issue while ultimately promoting empathy and understanding among its young audience. Similarly, the film *Inside Out* offers an insightful exploration of emotional theory and regulation, illustrating how the suppression and denial of emotions impact behavior. This film has been incorporated into children's mental health curricula as a valuable resource (Pixar, 2015).

In the Arab region, animated campaigns such as *Our Children in Egypt* and *Lebanon* are employed to raise awareness and provide language that resonates with children's cultural contexts, fostering values of respect and empathy (UNICEF, 2019). In this regard, the language—comprising vocabulary, tone, and dialogic context—used in animated content plays

a crucial role in either promoting or undermining these values. Therefore, careful educational oversight is necessary to ensure that children are not exposed to language that could reinforce bullying behaviors.

By integrating visual narrative with a powerful use of color, animated media offer enhanced educational and therapeutic opportunities to foster emotional sensitivity and preventive moral values in children. This development cultivates a language of responsibility that empowers children to reject cyber violence and verbal aggression while encouraging positive social interactions.

III. METHODOLOGY

This study employs a methodology specifically tailored to the medium under investigation, the Jordanian animated series *Our Family Life*, by combining interpretive-analytical, critical discourse, and semiotic approaches. The series is conceptualized as a visual, linguistic, and cultural text addressing bullying within realistic school settings. This integrated method analyzes cartoon discourse as a semiotic representation of social meaning, recognizing spoken language and local dialects as cultural tools that extend beyond mere cues. Instead, they function as expressive media that organize signs and meanings aimed at shaping individual identity.

This research draws upon the interpretive tradition as a flexible qualitative framework to analyze dialogic texts within their cultural and societal contexts, revealing the value-laden dimensions embedded in character discourse. Critical Discourse Analysis (CDA) is instrumental in uncovering patterns of power, discrimination, and the construction of bully and victim roles, with particular emphasis on the linguistic mechanisms that establish authority and representation in dialogue. This framework is further enriched by incorporating social semiotics, which examines verbal and non-verbal signs—such as intonation, gestures, and scene context—as meaning systems that reflect bullying dynamics rooted in local culture.

Three episodes of the series were selected based on their explicit or implicit portrayal of verbal, social, and psychological bullying, as well as the diversity of educational settings depicted, such as school, home, and digital environments. Qualitative textual analysis was conducted through manual transcription of dialogues, alongside detailed documentation of the language–semiotic framework for each scene, including factors such as location, speaker identity, vocal expression, and emotional tone.

The transcribed dialogues underwent detailed semiotic analysis, with bullying-related language—such as pressuring, ridiculing, excluding, marginalizing, verbal attacks, and threats—systematically coded. These coded instances were then categorized according to the argumentative structure of the dialogues, allowing for the identification of strategies of justification or resistance employed by the characters. Additionally, the analysis considered the Jordanian dialect as a cultural tool conveying implicit messages tied to societal values, traditions, and modes of thought.

These coding processes were documented using qualitative coding tables that captured differences among characters regarding vocabulary usage, frequency of bullying types, and their distribution across the episodes. This approach enabled the identification of semantic markers that illustrate how bullying discourse is constructed in the series—whether as enforced aggression or forms of resistance.

This methodology, combining interpretive and comparative approaches, aligns with the unique nature of animation as a hybrid expressive medium where text, image, and sound are intricately interwoven to address sensitive educational topics. As such, analysis must go beyond surface-level narrative to engage with the symbolic and cultural meanings embedded in the language used.

IV. RESULTS AND DISCUSSION

Episode (1)

Title: *Sally the Wronged* (Our Family Life, n.d.)

Duration: 6:14 minutes

Dialect: Local Jordanian Dialect

Scene One

(*Schoolyard – Morning*)

Both Sally and Maram are running for student council president.

Sally, accompanied by her friend, is preparing campaign signs and posters. She stands in front of her classmates and speaks enthusiastically:

Sally:

“I want to start my campaign with my own class — my family — and then continue with the rest of the classes.

The students are aware, even if people think they don’t know what’s best for them.

But we need to show them that we can make a real difference in our school.

We need the support of the teachers and parents — their role is important.

We have to organize activities that bring everyone together.

And in the end, even if people say the student council is just a headache...

I don't care, because it's the beginning of the change we all need."

(Maram stands off to the side, holding her phone and filming Sally as she speaks.)

Maram's friend (whispering):

"What are you happy about? Why are you filming? Honestly... we're in danger!

Look at how the whole class is clapping nonstop!"

Maram (mockingly):

"Let her class — I mean her *family* — help her now!"

Her friend:

"What do you mean?"

Maram (with a wink and raised finger):

"You'll see..."

Scene Two

(Inside Maram's class)

Maram's friend:

"Did you send the video or not yet?"

Maram (holding her phone and smiling):

"Sent..."

Scene Three

(Students' and teachers' phones begin receiving a doctored video with choppy audio and manipulated editing. It features cut segments of Sally's actual speech.)

In the edited video, Sally is made to say:

"Honestly, students don't know what's best for them...

Parents' roles aren't important...

Teachers? A headache...

And me? I don't care."

Scene Four

(In class – Break time)

Student (to Sally, surprised):

"When did you say that?!"

Sally (shocked):

"Me?! I didn't say that! What's going on?!"

Scene Five

(At Sally's house – Mothers' meeting)

Sally's mother (angrily):

"The principal confirmed that a teacher was present while Sally spoke, and that she didn't say any of those things...

It's clear someone faked the video just to harm my daughter!"

Scene Six

(On stage – Announcement of election results)

Teacher:

"The winner of the student council presidency is... Maram!"

(The principal suddenly intervenes and speaks with the teacher, then addresses the students.)

Principal:

"Before announcing the results, there's something important we need to discuss...

As a school, we reject any form of bullying,

especially cyberbullying.

After reviewing the video that circulated about Sally,

and tracing its source...

We announce that Maram has decided to withdraw from the election,

because the video was fabricated and sent with the intent to damage her classmate's reputation and influence the vote.

Since there are no other candidates,

the new student council president is: Sally!"

(The stage erupts in applause and celebration. Sally smiles with emotion.)

Principal (continues):

"Appropriate action will be taken against anyone involved in producing and sharing the doctored video."

End of Episode – Awareness Message:
 “Not everything we see or hear online is true.
 Verify, think, and ask before you judge!”

Analysis:

TABLE 1
 ANALYSIS OF EPISODE (1)

IScene	Interpretive Analysis	Critical Discourse Analysis	Semiotic Analysis
Schoolyard	Sally represents collective awareness and hope for change, in contrast to Maram's sarcastic hints reflecting futility and value-based division.	Sally's discourse is constructive and inclusive; Maram uses mockery and innuendo as early implicit strategies of undermining.	The colors of the banners and the camera movement toward Sally symbolize collective and symbolic support.
Maram's Video	Sally's words are reconstructed out of context, revealing the danger of semantic manipulation.	Fabrication is used as a discursive tool of dominance that distorts the original meaning and produces a false narrative against the victim.	The edited montage and choppy audio symbolize symbolic and media-based violence.
Sally's Reaction	Her shock reflects a loss of control over self-representation; a rupture appears between the self and the projected image.	She appears as a victim of a dominant discourse, questioning the legitimacy of the information but lacking defensive tools in the moment of shock.	Sally's facial expression and the surrounding silence intensify the sense of emotional isolation.
Mother's Response	Family support emerges as part of a social resistance network; uncovering the truth contributes to reconstructing meaning.	The mother refutes the bullying discourse by restoring her daughter's legitimacy through assertive, authoritative language.	Warm home lighting contrasts with the cold school scenes, symbolizing affection and support versus conflict.
Stage and Ending	Symbolic justice is achieved, and the context shifts from competition to recognition and moral triumph.	The principal's discourse declares the institution's stance against bullying and deconstructs the dominant discourse by revealing the truth on an official platform.	Use of the microphone, audience applause, and victory music indicate the recovery of a previously silenced voice.

The episode “Sally the Wronged” from the Our Family Life series offers a multi-layered depiction of cyberbullying, achieved through a dramatic structure that deconstructs the relationships between characters, symbols, and semantics. The analysis of this episode is grounded in a methodology that integrates interpretive analysis, critical discourse analysis, and semiotic analysis.

Initially, Sally is portrayed as a participatory student, embodying collective awareness, while Maram is depicted as a derisive figure of positional authority, embodying covert resistance to reformative values. Analysis of Maram's narrative and discourse reveals how sarcasm and digital fabrication function as symbolic tools of ostracism and caricature, contributing to the construction of the Other.

The manipulated video montage serves as a tool to construct a fabricated narrative, repurposing Sally's words within a new context that fuels media-driven acts of symbolic violence. Sally's reaction highlights a stark disconnect between her true self and her digitized image. In contrast, the interventions of her mother and the headmaster redirect the narrative by introducing social and institutional support, demonstrating the potential for resistance and restoration of balance.

From a semiotic perspective, the episode employs specific visual and auditory elements—such as rising music, contrasting lighting, and audience applause—to signify the restoration of symbolic justice. Overall, the episode serves as a compelling example of how violence can be portrayed through language, culture, and cognition, highlighting the need for critical and interpretive engagement.

Episode (2)

Title: *Your Celebration Is Not Theirs* (Our Family Life, n.d.)

Duration: 4:25 minutes

Dialect: Local Jordanian Dialect

Scene One:

The episode opens with the "Sanad" family gathering to plan his birthday party. Sanad suggests inviting his school friends, and the family agrees to host the celebration at a nearby football field.

Sanad and his sister Sally begin designing invitation cards to hand out to his classmates.

Scene Two:

At school, Sanad begins distributing the invitations to classmates, including "Fares" and "Omar."

The three agree to divide the guests into two football teams for the party.

Sanad then remembers he forgot to invite "Karim." As he approaches to give him the card, Omar intervenes:

Omar: "Don't invite him. I can't stand him. He's new, and nobody knows him. If you invite him, Fares and I won't come."

Sanad hesitates, and ultimately decides not to invite Karim.

Scene Three:

Karim is sitting alone in the schoolyard, looking sad.

Sally approaches:

Sally: "Have you seen Sanad? He forgot his breakfast with me."

Karim (sadly): "Yeah, I saw him at the field. He was dividing them into teams for his birthday."

Sally: "Why aren't you with them?"

Karim: "I wasn't invited."

Scene Four:

At home, Sally confronts Sanad:

Sally: "Sanad, did you forget to give Karim the invitation card?"

Sanad: "No, I didn't forget. I just decided not to invite him... and how did you know he wasn't invited?"

Sally: "Seriously? You're inviting the whole class except him? Imagine how you'd feel if someone did that to you!"

Sanad: "He's new, and he doesn't like playing football. I thought it wouldn't matter to him."

Sally: "I saw him. It mattered a lot to him."

She continues: "Remember three years ago when Lama invited all the girls in class to her birthday except Runa and me? I still remember how upset I was."

Sanad: "But Omar and Fares said if I invite him, they won't come. And they're my friends."

Sally: "But it's not their birthday — it's yours. You decide who to invite."

Scene Five:

At the football field during the party, Sanad is standing with Omar and Fares. Suddenly, Karim arrives.

Omar (surprised): "What? Karim? You invited him?"

Sanad (smiling): "Yeah, I did. Imagine inviting the whole class and not him — how would he feel? Let's start the game!"

The scene cuts to a joyful moment of Sanad celebrating with his friends as he blows out his birthday candle.

Final Message:

"Your celebration... should bring joy to everyone, not just your close friends. Fair choices create lasting memories."

Analysis:

TABLE 2
ANALYSIS OF EPISODE (2)

Scene	Interpretive Analysis	Critical Discourse Analysis	Semiotic Analysis
Family Gathering	The family represents a warm, supportive environment shaping a collective vision of joy. The "birthday" symbolizes belonging.	Inclusive discourse, with no sign of exclusion. The child is involved in planning and has a voice.	Warm lighting, cheerful music, and overall ambiance suggest intimacy and good intentions.
Sanad–Omar Dialogue	Reflects internal conflict between inclusivity and peer pressure, highlighting conditional belonging.	Omar uses implicit threat discourse: "If you invite him, we won't come" — a pressure tactic leading to an unfair decision.	Omar's body language (interrupting, intimidating), and tone of voice emphasize his attempt to assert control.
Karim's Isolation	"Not being invited" is interpreted as symbolic exclusion. Karim represents vulnerability in a setting that appears joyful externally.	There is no direct verbal attack, but deliberate neglect conveys a clear message of marginalization.	The shot of Karim sitting alone, with the camera pulling back and fading sound — visually and aurally emphasizes isolation and sadness.
Sally Confronts Sanad	Sally deconstructs Sanad's justifications from a personal and experiential perspective, reframing the issue in terms of justice and empathy.	Sally reclaims moral authority in the face of peer pressure, demonstrating how individuals can resist dominant peer narratives.	Close-up on Sally's face, serious tone, reference to past emotional memory — adds emotional weight to her argument.
Party Resolution	Sanad realigns his priorities and includes Karim in the celebration, reconstructing a new collective based on fairness, not favoritism.	The discourse shifts from peer-driven justification to independent moral decision-making.	Birthday candle scene, Karim's smile, and balanced character positioning in the final shot symbolize reconciliation and equity.

In the episode "Your Celebration Is Not Theirs," the subtle psychological dynamics of social bullying—manifested as indirect exclusion in child-friendly party settings—are explored. Employing interpretive, critical, and semiotic analyses, the episode highlights the contrast between public celebration and the private emotional pain caused by exclusion.

The power imbalance is portrayed through Omar, who, leveraging his social status, marginalizes the new student Karim. Sanad oscillates between submission and uncertainty until Sally initiates an ethical and interpretive dialogue that shifts the narrative focus toward themes of justice and empathy for the Other.

From a semiotic perspective, the episode reinforces its themes through visual cues—such as schoolyard isolation and the birthday candle—that convey complex meanings related to justice and inclusion. Ultimately, the series delivers a clear pedagogical message: "True joy is only complete when it is inclusive," a message conveyed through the dynamic interplay of ethical discourse and the aesthetic composition of the animated frame.

Episode (3)

Title: *Express With Respect* (Our Family Life, n.d.)

Duration: 6:19 minutes

Dialect: Local Jordanian Dialect

Episode Summary

Scene One:

Sally hands her parents a paper to sign while messaging on her phone. Suddenly, the mother's phone rings.

Scene Two (Flashback to three days earlier):

It's Talent Show Day at school. After a student sings and another recites poetry, Maram performs a theatrical skit mimicking teachers in a humorous way. The audience laughs.

Sally, upset and blushing, exclaims:

"What nonsense is this?! Seriously? We weren't raised like this!"

Scene Three:

In her room, Sally talks with classmates on the phone and encourages them to comment on Maram's social media post.

Sally writes:

"Are you seriously proud of what you did? We don't want you at our school. You deserve it. Let the whole school stand against you!"

Scene Four (Return to the present):

The mother calls out angrily:

"Sally, what did you do? And what's this paper?! Maram's mother just told me Maram hasn't left the house in three days because of what happened."

Sally replies:

"But she was wrong! She mocked the teachers. We're not bullies, she started it!"

The mother responds:

"So if someone does something we don't like, this is how we respond? Imagine if all your friends wrote those same hurtful comments about you. How would you feel?"

The father interjects:

"I don't understand what's going on."

The mother hands him the paper:

"Read it."

The document turns out to be a dismissal letter for Maram.

Sanad says:

"Maram did that skit in front of the teachers and girls only. But you posted about her in front of the whole school!"

Sally responds angrily:

"Why do you care?"

Father:

"Sally, we didn't raise you like this. Express your opinion with respect, without hurting others. What you did is called cyberbullying — and that kind of bullying can destroy lives."

The mother asks Sally to make things right.

Scene Five:

In the schoolyard, Sally approaches Maram:

Sally:

"What I did hurt you a lot. But I was really upset with what you did. I didn't know you got permission from the teachers, and they'd seen the script."

Maram:

"Yeah, every teacher saw the skit before I performed it, and everyone approved."

Sally:

"I'm really sorry for what I said. I should've talked to you directly instead of posting like that."

Scene Six:

In front of classmates, teachers, and Maram, Sally speaks:

"On behalf of myself and my friends, we want to apologize for the way we expressed our opinion, which caused great harm to our classmate, Maram."

Maram replies:

"And I accept the apology. Sally and I have decided to start an initiative to teach people how to express their opinions with respect. That's why we launched the hashtag: #Express_With_Respect."

Analysis:

TABLE 3
ANALYSIS OF EPISODE (3)

Scene	Interpretive Analysis	Critical Discourse Analysis	Semiotic Analysis
Stage Performance	The scene reveals a tension between artistic expression and “traditional upbringing,” where satire is interpreted as disrespect rather than legitimate expression.	Maram’s discourse is perceived as a violation of “acceptable conduct,” allowing for a retaliatory moral discourse to emerge.	Audience laughter, Sally’s angry reaction, and close-up shots highlight emotional rupture and immediate rejection.
Sally’s Response	Sally transitions from a frustrated observer to a digital aggressor, using harsh language under the guise of defending “values.”	Her discourse shifts from personal displeasure to collective exclusion via digital media.	Sally’s angry tone, her aggressive written comment, and phrases like “You deserve it” serve as markers of codified psychological violence.
Family Dialogue	The family deconstructs Sally’s position, restoring moral responsibility in place of emotional reactivity.	The father clearly names the act as “cyberbullying,” redefining the roles of aggressor and true victim.	The expulsion paper, the father’s silence, and intense dialogue contribute to the symbolic moment of recognizing wrongdoing.
Reconciliation Scene	Sally adopts a tone of apology and explanation, and the positive intent behind Maram’s action is revealed.	Mutual acknowledgment restores balance; Sally rebuilds her discourse through direct dialogue rather than mediated aggression.	The framing of both characters together, calm tone, and absence of music symbolize reconciliation and clarity.
Initiative Launch	The individual apology becomes a collective act, rebuilding the school community around the value of respectful expression.	A shared discourse reflects the transformation from digital retaliation to digital repair.	The hashtag #Express_With_Respect, shown against a backdrop of students and teachers, symbolizes the creation of a new school culture.

From interpretive, critical, and semiotic perspectives, the three episodes of *Our Family Life* function as polyphonic texts, where language operates not as a neutral medium but as an active agent shaping power dynamics and social relationships within the school environment. The series offers a compelling exploration of the performative nature of language—demonstrating how words can construct, exclude, or heal, depending on their context and intent.

The digital manipulation in *Sally the Wronged* employs language to construct a narrative against Sally, utilizing speech acts as tools of exclusion. In contrast, “Your Celebration Is Not Theirs” depicts symbolic exclusion through silence and omission, functioning as a form of negative rhetoric that marginalizes through refusal rather than direct confrontation.

Finally, “Express with Respect” examines how unchecked moral language can mask symbolic violence, transforming ethical concern into a guise for social aggression.

The language used across episodes blends colloquial Jordanian Arabic, rich in cultural nuance, with formal educational discourse. Rather than reflecting the traditional heteroglossic nature of diglossia, this linguistic mix semiotically situates speakers within a social class hierarchy. Phrases such as “We won’t come if you invite him” or “He is new... it doesn’t matter to him” reveal discursive strategies aimed at legitimizing exclusion or minimizing moral accountability—ways of speaking and acting in daily life that structurally contribute to the perpetuation of bullying dynamics.

From a semiotic perspective, visual framing elements—such as close-ups, facial expressions, lighting, and sound cues like silence and celebratory music—contribute to a multimodal system of meaning that extends beyond dialogue. Together, these elements create a layered portrayal of bullying, presenting it not as isolated incidents but as cultural discourses that require critical examination, collective engagement, and reimagining grounded in justice, empathy, and inclusion, fostering a digital childhood that can be truly cherished.

V. CONCLUSION

An interpretive and critical semiotic analysis of the three episodes of *Our Family Life* reveals that language serves as a central mechanism for representing bullying through dialogic frameworks rich in symbolic meaning and communicative patterns. This portrayal frames bullying as a discursive interaction rather than an isolated behavioral act. The episodes depict a variety of bullying forms, including digital manipulation, covert social exclusion, and the instrumentalization of collective moral language against individuals. This diversity underscores that language is not a neutral tool but a vehicle of power, playing symbolic roles in the construction of education and culture.

Violence in Episode 2 (*Sally the Wronged*) is effectively illustrated through historical and visual metaphors, where speech is manipulated—edited, spliced, or interrupted—dismantling its original meaning and reshaping the message for a wider audience. The victim’s words are inverted, recasting her accusatory discourse to portray her as the aggressor. This highlights a key insight: children are more influenced by vocal intonation and delivery than by visual imagery, making the corruption of dialogue a particularly damaging form of abuse, even in the absence of physical violence. These findings align with Park et al. (2019), who demonstrated that narrative and linguistic elements evoke stronger emotional and cognitive engagement than visual details—evident here as Sally’s demeanor dramatically shifts following the spread of the altered video.

In *Your Celebration Is Not Theirs*, bullying manifests as subtle social exclusion, conveyed through polite language and excuses—for example, Sanad’s remark, “He’s new... I don’t think it even matters to him.” This softer form of exclusion reflects symbolic omission rather than overt insult. This aligns with Smith et al. (2016), who argue that, within certain

linguistic and cultural communities, exclusion can be more painful than physical aggression. The episode further illustrates how cartoon dialogue embodies cultural and ideological dimensions, expressed through language of affiliation and disaffiliation, evident when Sanad chooses loyalty to old friends over acceptance of a new peer.

In *Express with Respect*, bullying is portrayed as digital aggression cloaked in moral justification. Although Sally believes she is upholding school values, her online statements—such as “We don’t want you at our school”—are charged with exclusionary and accusatory language. Here, moral rhetoric is weaponized to enact collective symbolic violence. This episode exemplifies how irony and indignation can obscure the severity of aggression if their educational implications are not carefully examined. It further reinforces the idea that, for children, the tone and content of speech can have a greater impact than the visual depiction of aggression.

These findings demonstrate that *Our Family Life* conceptualizes bullying not merely as a behavioral issue but as a linguistic and cultural phenomenon. The use of the Jordanian vernacular dialect in the series serves as a symbolic medium imbued with emotional and social values. Within bullying contexts, this dialect functions both as a tool for ostracism and as a means for fostering empathy and correction, aligning with theoretical perspectives on language’s role in constructing and reshaping social meaning.

In contrast to previous studies, this analysis highlights *Our Family Life* as a rare Arabic series that deconstructs bullying by focusing on everyday speech acts and natural dialogic situations rather than overt moralizing. The episodes reveal that symbolic violence often arises not from explicit statements but from how messages are conveyed, through silence, justification, and the dynamics of who speaks and who remains unheard.

Amid increasing demand for culturally relevant educational materials that reflect children lived experiences, the findings demonstrate that *Our Family Life* offers an authentic linguistic portrayal of bullying. By emphasizing colloquial language and the Jordanian dialect, the series transcends conventional educational messaging to present a conceptual discourse model that critically deconstructs bullying, situating it within a broader pedagogical and cultural framework.

Further analysis of the episode reveals that language, through its expressions, tones, and argumentative styles, operates not merely as a narrative device but as a vital semiotic resource that signals dynamics of power, exclusion, and belonging. The language employed in the series prompts children’s critical awareness, encouraging them to question rather than simply imitate behaviors.

The study confirms that *Our Family Life* is one of the few Arabic animated productions that directly engages the Arab child’s conscience regarding bullying through dialogue animated in a style that blends cultural relevance with educational depth. Furthermore, the findings underscore the effectiveness of language as a semiotic and cultural medium in reinforcing ethical values and promoting behavioral awareness among children. This supports the core argument of the study and offers a valuable model for future research on the linguistic representation of learning behaviors in Arabic children’s animated media.

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The Effect of Integrating Concept-Based and Task-Based Instructional Activities on EFL Academic Collocation Learning

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Abstract—This study examined the effects of integrating Task-Based Instruction (TBI) with Concept-Based Instruction (CBI) on Vietnamese EFL students' acquisition of academic collocations and their learning perceptions. Using a mixed-methods design, 73 English majors from two classes were divided into an Integrated Group (n = 42) that received integrated instruction and a TBI Group (n = 31) that received only task-based instruction. An Academic Collocation Test (ACT) was administered before and after the intervention, followed by semi-structured interviews with seven students. Findings showed that both groups improved significantly, but the Integrated Group achieved greater overall gains and more balanced progress in grammatical and lexical collocations. Interview data revealed that integrated instruction enhanced conceptual understanding, engagement, and application of collocations in writing. This study provides empirical evidence that integrating TBI and CBI is effective in supporting academic vocabulary learning and offering pedagogical implications for designing theory-informed instruction in tertiary EFL contexts.

Index Terms—academic collocations, concept-based instruction, EFL, integrated instruction, task-based instruction

I. INTRODUCTION

Academic collocations constitute a fundamental component of English for Academic Purposes, critical for scholarly communication (Coxhead, 2018). Despite their significance, EFL learners encounter persistent difficulties with collocational acquisition due to the inherent complexity of this area (Ellis, 2003). Recent research in Vietnam has confirmed that English-major students lacked academic collocational knowledge and perceived a need for urgent training to build their confidence in academic writing (My & Loi, 2025).

Traditional instructional methodologies have proven insufficient for developing robust collocational competence (Li & Lei, 2024), underscoring the need for innovative pedagogical interventions. Task-Based Instruction (TBI) and Concept-Based Instruction (CBI) represent two established methodological frameworks in language pedagogy. While TBI emphasizes authentic language production through communicative tasks (Ellis, 2003), CBI facilitates metalinguistic awareness by elucidating underlying linguistic patterns (Lantolf & Thorne, 2006). Despite their individual merits, each presents its unique limitations, but research examining the integration of these approaches for academic collocation acquisition remains sparse.

This study investigates the efficacy of an integrated TBI-CBI approach on Vietnamese EFL learners' academic collocation acquisition, addressing two research questions:

1. To what extent does integrating TBI and CBI activities affect Vietnamese EFL learners' academic collocation acquisition compared to isolated TBI?
2. What are Vietnamese EFL learners' perceptions and experiences regarding the integration of TB and CB Instructional activities?

II. LITERATURE REVIEW

Academic collocation acquisition represents a critical challenge in EFL pedagogy, where sophisticated lexical competence intersects with cognitive processing limitations and instructional constraints. This review synthesizes contemporary theoretical frameworks and empirical evidence to establish foundations for an integrated model of Task-Based Instruction (TBI) and Concept-Based Instruction (CBI).

A. Academic Collocations: Conceptualization and Acquisition Challenges

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Academic collocations are restricted lexical co-occurrence patterns that exhibit statistical significance in scholarly discourse (Ackermann & Chen, 2013). Benson et al.'s (1986) taxonomy distinguishes grammatical collocations (e.g., rely on, consistent with) from lexical collocations, comprising verb-noun (e.g., conduct research), adjective-noun (e.g., substantial evidence), and noun-verb (e.g., findings indicate) combinations. These high-frequency multi-word units, fundamental to academic literacy (Coxhead, 2000), demonstrate acquisition patterns distinct from general vocabulary through complex form-meaning-use interdependencies.

Psycholinguistic research reveals that collocational processing integrates statistical learning and holistic storage mechanisms (Ellis, 2002; Wray, 2002). However, EFL learners face persistent challenges due to L1 interference, leading to errors such as substituting 'research' for 'conduct research' (Granger & Bestgen, 2014). This reveals a critical gap between recognition and production. Nation's (2013) framework emphasizes that mastering form, meaning, and use demands explicit focus. Since explicit instruction yields stronger outcomes than incidental exposure (Peters, 2016), and integrated approaches combining both methods foster collocational fluency (Webb & Nation, 2017), explicit-integrated instruction offers a more effective pathway to academic writing competence.

B. Task-Based Instruction: Cognitive Affordances and Limitations

Task-Based Instruction employs goal-oriented, meaning-focused activities enabling learners to accomplish authentic communicative objectives (Ellis, 2003). Empirical research indicates that task repetition and cognitive challenges enhance collocation learning, particularly in collaborative settings promoting negotiation and diverse input (Dao & Newton, 2021). However, while tasks promote fluency, they often neglect the conceptual and structural dimensions of collocations (Boers & Lindstromberg, 2009). Task-based dictionary activities yielded only moderate accuracy in verb-noun collocation use (Chen, 2022), indicating that learners struggle without explicit linguistic support. Scholars argue that supplementing TBI with focus-on-form strategies and metalinguistic scaffolding is essential for accuracy and durable learning (Ellis, 2006; Boers & Lindstromberg, 2009). These limitations suggest that TBI requires integration with conceptually oriented frameworks to foster a deeper understanding of the abstract principles governing lexical combinations.

C. Concept-Based Instruction: Sociocultural Foundations and Metalinguistic Development

Concept-Based Instruction (CBI), grounded in Vygotskian sociocultural theory, develops learners' conceptual understanding through systematic mediation and conceptual scaffolding (Lantolf & Thorne, 2006). Unlike traditional approaches that present surface-level rules, CBI provides principled explanations that facilitate generalization through internalization. Scientific concepts transcend memorization, enabling conscious control over linguistic choices (Negueruela, 2008).

To illustrate CBI for collocation instruction, consider teaching verb-noun collocations with 'research.' Traditional instruction might list correct forms (conduct research, carry out research) and incorrect ones (do research, make research). In contrast, CBI operates through three interconnected stages:

- 1. Conceptualization:** Present the underlying concept that academic English employs specialized verbs conveying precision and formality. The verb conduct emphasizes systematic, methodical processes characteristic of scholarly work, while do and make lack the semantic specificity required for the academic register. Learners understand the principle: academic discourse selects verbs based on semantic precision and register appropriateness.

- 2. Materialization:** Provide visual representations and systematic categorization. For instance, a semantic formality scale (do → carry out → conduct) illustrates register gradation. Categorization schemas might group verbs by academic function: research activities (conduct, undertake), data handling (collect, analyze), and knowledge dissemination (present, publish). These external tools mediate between learners and abstract linguistic patterns.

- 3. Verbalization:** Engage metalinguistic reflection through guided questions: "Why is conduct more appropriate than do in academic writing?" "What semantic features make certain verb-noun combinations register-appropriate?" Learners articulate principles in their own words, transforming implicit knowledge into conscious understanding (Van Compernelle, 2014).

This systematic scaffolding addresses limitations of meaning-focused approaches by developing metalinguistic awareness essential for accurate production. Empirical evidence demonstrates that concept-based collocation instruction outperforms conventional methods in both receptive knowledge and productive accuracy (Nguyen & Webb, 2017). Recent studies further show that combining CBI with communicative practice—such as task-based or output-oriented activities—optimizes learning outcomes by uniting conceptual understanding with contextualized production (Lantolf, et al., 2020; Van Compernelle & Henery, 2014).

D. Justification for Integration: Addressing Persistent Gaps

Contemporary research demonstrates that neither TBI nor CBI alone results in comprehensive collocational competence. González-Fernández and Schmitt's (2020) meta-analysis reveals consistent recognition-production disparities across L1 backgrounds, with productive deficits particularly pronounced for academic collocations. Vietnamese EFL contexts exemplify these challenges. Nguyen and Webb's (2017) investigation identifies a significant gap between receptive recognition (82%) and productive deployment (53%), highlighting a persistent divide between

declarative and procedural knowledge. Vo's (2024) corpus-based analysis reveals systematic errors resulting from direct translation patterns.

Contemporary SLA theory provides foundations for integration. Ellis's (2005b) Interface Position posits that explicit knowledge can facilitate implicit acquisition when appropriately integrated with meaningful practice. Schmidt's (2001) Noticing Hypothesis suggests conscious attention to formal features enhances acquisition while remaining compatible with communicative principles. The New London Group's (1996) multiliteracies framework (Cazden et al., 1996; Cope & Kalantzis, 2016) provides comprehensive foundations for integrated instruction through four knowledge processes: experiencing, conceptualizing, analyzing, and applying. This framework transcends additive combinations by establishing systematic pedagogical sequences honoring both cognitive and sociocultural SLA perspectives.

E. An Integrated TBI-CBI Framework for Academic Collocation Learning

Building on the theoretical foundations and empirical evidence presented earlier, this study proposes an integrated instructional framework that systematically combines TBI and CBI principles and activities. As illustrated in Figure 1, the framework operationalizes multiliteracies pedagogy through structured phases that address the documented limitations of singular approaches.

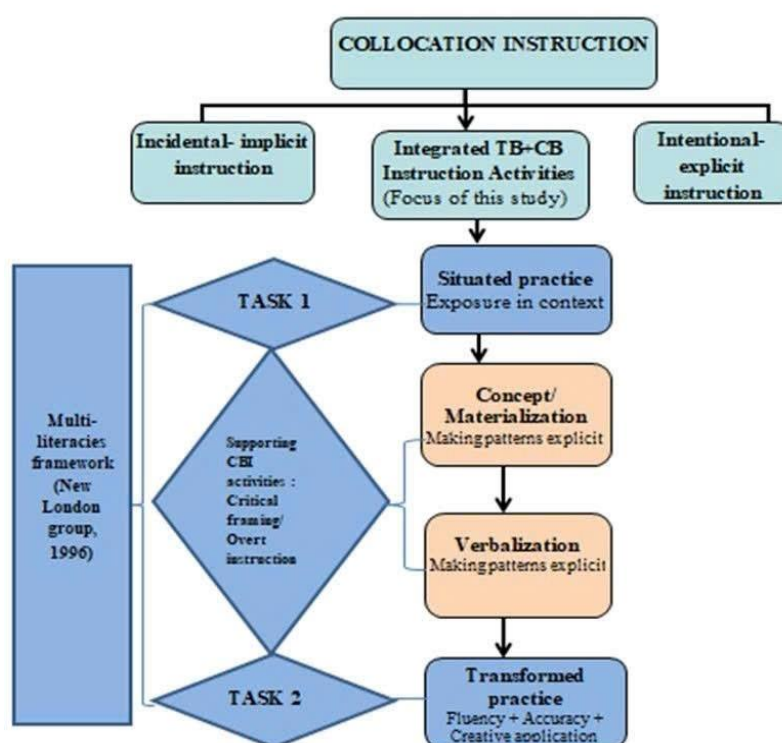


Figure 1. An Integrated TBI-CBI Instructional Model for Academic Collocation Learning
(Adapted from the New London Group's multiliteracies framework, Cazden et al., 1996)

The framework begins with Task 1 (Situated Practice), in which learners engage in authentic academic tasks that involve target collocations in meaningful contexts, establishing form-meaning mappings through communicative necessity. The subsequent conceptualization and materialization stages render patterns explicit through guided reflection and visual representations, thereby fostering metalinguistic awareness, which is essential for generalization. Verbalization involves systematic externalization through metalinguistic discussion and rule formulation, facilitating the development of conscious awareness. Critical Framing highlights cross-linguistic contrasts and register-specific constraints, addressing documented L1 interference. The culminating Transformed Practice phase (Task 2) integrates advanced communicative tasks that require the creative deployment of internalized knowledge within novel academic contexts.

This recursive model promotes a dynamic interplay among input, reflection, and output, addressing documented gaps between acquired knowledge and real-time performance (Morgan-Short et al., 2012). The framework reflects task-based instruction principles (Ellis, 2003; Long, 2014), incorporating systematic conceptual development and offering theoretically grounded, empirically informed approaches to the development of academic collocation. The framework's innovation lies not in the additive combination of techniques but in the systematic synthesis of a paradigm that addresses persistent challenges through principled pedagogical design, providing robust foundations for the empirical investigation of integrated instructional approaches in tertiary EFL contexts.

III. RESEARCH METHODOLOGY

A. Research Design

This study employed an explanatory sequential mixed-methods design to examine the impact of integrated TBI and CBI on English as a Foreign Language (EFL) learners' acquisition of academic collocations (Creswell & Plano Clark, 2017). Rooted in a pragmatist epistemology (Tashakkori et al., 2020), the design emphasized methodological complementarity and triangulation.

The quantitative phase adopted a quasi-experimental design with cluster randomization of two intact classes (Harris et al., 2006). The experimental group ($n = 42$) received integrated TBI–CBI instruction, whereas the comparison group ($n = 31$) was exposed to isolated TBI. This design preserved ecological validity and addressed unit-of-analysis issues in classroom-based research (Hedges & Rhoads, 2010). The qualitative phase utilized semi-structured interviews to explore participants' experiences. Data integration adhered to explanatory sequential principles, whereby quantitative results guided the qualitative strand (Schoonenboom & Johnson, 2017).

B. Participants

The sample consisted of 73 third-year English majors (aged 20–21) from a public university in Vietnam's Mekong Delta region. All students had completed two years of coursework aligned with the CEFR B2 level. Two intact classes of Academic Report Writing were selected, and random assignment was applied at the class level. This course was chosen for its close alignment with the study's aims, requiring discipline-specific writing tasks where collocational competence is critical.

C. Research Instruments

(a). Academic Collocation Test

The Academic Collocation Test (ACT), developed and validated by My and Loi (2025), was employed to measure receptive and controlled productive knowledge of academic collocations. The instrument was initially developed by drawing on Nation's (2001) framework and Coxhead's (2018) Academic Word List, based on corpus-based analysis of authentic academic texts. Following expert review and pilot testing (2 times) with 224 intermediate-level EFL learners, the final 50-item instrument demonstrated robust psychometric properties: high internal consistency (Cronbach's $\alpha = .916$), excellent inter-rater reliability (98% agreement), and strong construct validity evidenced through unidimensional factor structure and significant discrimination between proficiency levels. Content validity was confirmed via expert validation ($CVI \geq 0.80$).

The test comprises 50 gap-fill items requiring learners to complete academic collocations within authentic sentence contexts. Each item provides the first 1–2 letters as orthographic cues to constrain responses while maintaining productive retrieval demands. Sample items include:

1. The books are **ca**_____ into beginner and advanced levels. (categorized)
2. Many scholars **d**_____ literary criticism into two categories. (divide)
3. **Dr**_____ conclusions from these findings, students could improve performance. (Drawing)
4. The term often **r**_____ to a figure of speech in literature. (refers)

Each correct response receives one point (maximum score = 50). Two independent raters scored all tests following My and Loi's (2025) scoring protocols, discrepancies ($< 2\%$ of responses) were resolved through discussion. For complete test details and development procedures, see My and Loi (2025).

Several design features minimized potential practice effects from repeated measurement. The eight-week interval between pretest and posttest reduced simple memorization while providing sufficient time for instructional effects to manifest (Schmitt, 2010; Webb, 2007). Both groups received identical test exposure at the same time points, ensuring equal distribution of any familiarity advantages. Most critically, both instructional treatments exposed students to the same 50 target collocations with equal frequency and equivalent total instructional time (400 minutes distributed across 16 sessions of 25 minutes each), differing exclusively in pedagogical approach (conceptual metaphor-based scaffolding vs. corpus-based noticing instruction). This design ensures that observed score differences reflect genuine instructional effectiveness rather than differential item exposure or test familiarity effects.

(b). Semi-Structured Interviews

Semi-structured interviews were conducted with a purposive subset of participants representing both gender distribution and performance levels. The interview protocol combined predetermined open-ended questions with follow-up prompts (Kallio et al., 2016). Topics included perceptions of instructional activities, perceived benefits and challenges, self-reported confidence, and experiences with out-of-class workload and time investment across different activities. All interviews were audio-recorded, transcribed verbatim, and coded inductively following Braun and Clarke's (2006) thematic analysis. Trustworthiness was ensured through member checking, inter-coder reliability checks, and negative case analysis (Nowell et al., 2017).

D. Instructional Design and Implementation

Two instructional approaches were compared, both following task-based principles but differing in their treatment of collocational knowledge:

1. **Integrated TBI–CBI:** Combined communicative task orientation (Ellis, 2003) with conceptual scaffolding (Lantolf & Thorne, 2006)
2. **Isolated TBI:** Conventional task-based pedagogy without explicit conceptual mediation

(a). *Detailed Illustration of Pedagogical Differences*

To illustrate how the same content was treated differently across conditions, consider instruction on verb-noun collocations related to research methodology (e.g., *conduct research*, *collect data*, *analyze findings*). Both groups followed identical overall structures but differed critically in the 20-minute Preparation Phase:

Integrated TBI–CBI Approach:

- **Task 1 - Situated Practice (5 minutes):** Students examined authentic academic excerpts linking target collocations to specific rhetorical functions (e.g., methodology descriptions, classification statements) in research writing, establishing initial form-meaning connections through contextualized exposure.
- **Preparation Phase (20 minutes):** Students received explicit conceptual instruction explaining that academic English employs semantically specific verbs to convey methodological precision. A concept map visually organizes collocations by semantic category (research design: *conduct*, *undertake*, data handling: *collect*, *gather*, analytical processes: *analyze*, *examine*). Through guided verbalization, students articulated underlying principles: “Why does academic writing prefer *conduct research* over *do research*?” “What semantic features make certain verbs more appropriate for academic contexts?” This systematic scaffolding developed metalinguistic awareness of register appropriateness and semantic specificity, enabling learners to understand *why* particular collocations are conventionally paired.
- **Main Task - Transformed Practice (20 minutes):** Students composed a 150-word methodology section incorporating target collocations, applying conceptual understanding to authentic writing under communicative pressure.
- **Post-Task (5 minutes):** Peer feedback emphasized collocational accuracy and appropriateness, reinforced by explicit reference to conceptual frameworks discussed in preparation.

Isolated TBI Approach:

- **Task 1 - Situated Practice (5 minutes):** Students examined authentic academic excerpts linking target collocations to specific rhetorical functions (identical to experimental group).
- **Preparation Phase (20 minutes):** Students read authentic research articles containing target collocations, completing noticing activities to identify verb-noun patterns. Brief explanations highlighted correct forms (*conduct research*, *collect data*) with minimal elaboration. Instruction focused on recognition and form-meaning associations without systematic conceptual scaffolding, visualization of semantic relationships, or metalinguistic verbalization of underlying principles.
- **Main Task - Transformed Practice (20 minutes):** Students composed a 150-word methodology section incorporating target collocations (identical task to experimental group).
- **Post-Task (5 minutes):** Peer feedback focused on meaning and task completion, with attention to collocational form as needed.

Both groups engaged with identical target collocations and equivalent task complexity, and with the exact same total instructional time (50 minutes per session), differing only in the depth of conceptual mediation during the 20-minute Preparation Phase.

(b). *Comparative Framework*

Table 1 summarizes key instructional differences:

TABLE 1
COMPARATIVE FRAMEWORK: INTEGRATED TBI–CBI VERSUS ISOLATED TBI ACTIVITIES

Instructional Element	Integrated TBI–CBI	Isolated TBI
Knowledge focus	Balanced emphasis on conceptual understanding and practical use	Predominantly practical application
Collocation presentation	Organized in semantic and conceptual networks	Introduced within task contexts
Use of visual tools	Frequent use of concept maps and organizers	Limited or absent
Explanation type	Explicit, concept-driven explanations	Brief, task-oriented explanations
Learner verbalization	Required articulation of collocational principles	Limited to task performance
Task structure	Tasks embedded in conceptual frameworks	Tasks as primary learning units

(c). *Lesson Structure and Time-on-Task Control*

The intervention lasted eight weeks, with one 50-minute experimental session per week embedded within the five-period Academic Report Writing course. Both groups received identical total instructional time (400 minutes over eight weeks) and equivalent task complexity. Each experimental session followed a four-phase structure:

- **Task 1 - Situated Practice (5 minutes):** Identical for both groups—linking target collocations to rhetorical functions in academic writing (e.g., classification, methodology description) through examination of authentic excerpts.

- **Preparation Phase (20 minutes):** Differed in pedagogical approach (conceptual scaffolding vs. noticing activities) but maintained equal duration.
- **Main Task - Transformed Practice (20 minutes):** Identical tasks requiring academic text production (150-200 words) under communicative pressure (Skehan, 1998; Lambert et al., 2021).
- **Post-Task Phase (5 minutes):** Peer feedback and reflection (similar structure, differing in depth of metalinguistic focus).

Out-of-class time was equivalent and standardized across both groups. Students attended four additional 50-minute periods per week (200 minutes) for regular Academic Report Writing coursework, which was identical for both groups and independent of the experimental intervention. These regular sessions followed the standard curriculum covering academic writing principles, genre analysis, and composition practice. The experimental treatment occurred only during the designated one-period-per-week intervention, ensuring that both groups received equal exposure to general academic writing instruction.

During the experimental sessions, both groups worked with the same 50 target collocations over the eight weeks. The Integrated TBI-CBI group's concept-mapping and metalinguistic verbalization activities during the 20-minute Preparation Phase replaced (rather than supplemented) the Isolated TBI group's extended noticing and recognition activities, thereby maintaining exact workload equivalence.

(d). *Target Collocations and Sequence*

The instructional sequence targeted 50 academic collocations (25 grammatical, 25 lexical), selected through corpus analysis and expert judgment for frequency and relevance in academic writing (Coxhead, 2018; Hyland, 2004; Swales & Feak, 2012). Both groups encountered all 50 collocations with equal frequency across eight functional categories aligned with research article structure (e.g., classification/definition, methodology, results, discussion). This organization promoted both lexical development and genre-specific competence.

1. *Data Collection and Analysis*

Data were collected over 15 weeks, including pretests (Week 1), an 8-week instructional intervention with systematic observations, posttests (Week 10), and semi-structured interviews. Analysis followed a three-phase convergent mixed-methods approach (Creswell & Plano Clark, 2017). First, quantitative data were coded and screened while interview transcripts were prepared. Second, descriptive statistics, paired-sample t-tests, and repeated-measures ANOVA were conducted with effect sizes reported (Cohen's *d*, partial η^2) (Field, 2018), while qualitative data underwent thematic analysis (Braun & Clarke, 2006) validated through member checking and inter-coder agreement. Finally, qualitative themes were mapped against quantitative findings to identify convergences and explanatory mechanisms.

2. *Ethical Considerations*

Institutional review board approval was obtained prior to data collection. Participants received detailed information sheets and provided informed consent. Participation was voluntary, with withdrawal rights maintained throughout (Cohen et al., 2018). All data were anonymized and reported in aggregate or under pseudonyms to ensure confidentiality (Creswell & Creswell, 2018).

IV. RESULTS

A. *The Effects of Instructional Activities on EFL Academic Collocation Learning*

The Academic Collocation Test demonstrated strong internal consistency (Cronbach's $\alpha = .916$), providing evidence of its reliability in measuring collocational knowledge.

(a). *Baseline Equivalence and Pre-Intervention Performance*

Table 2 presents descriptive statistics for the total sample ($n = 73$). The overall mean score of 6.37 out of 50 (12.74%) indicated minimal initial knowledge of academic collocation, with comparable performance across grammatical and lexical collocations.

TABLE 2
PRE-TEST PERFORMANCE: TOTAL SAMPLE AND GROUP COMPARISON

Measure	Items	Total Sample (n=73)	Integrated (n=42)	TBI (n=31)	t-test
Total Collocations	50	M=6.37, SD=6.85	M=6.43, SD=5.72	M=6.29, SD=8.24	$t(71)=0.08, p=.936, d=0.02$
Grammatical Collocations	25	M=3.26, SD=3.70	M=3.24, SD=2.98	M=3.29, SD=4.56	-
Lexical Collocations	25	M=3.11, SD=3.43	M=3.19, SD=3.09	M=3.00, SD=3.89	-

The independent-samples t-test confirmed that there were no statistically significant baseline differences, establishing group homogeneity and validating internal validity.

(b). *Post-Intervention Performance and Effect Sizes*

As shown in Table 3, both groups demonstrated significant improvements, though with markedly different magnitudes. The Integrated Group exhibited considerable effects across all collocation types (total: $d=3.77$, grammatical: $d=3.37$, lexical: $d=3.96$), substantially exceeding the TBI Group's significant effects (total: $d=1.49$, grammatical: $d=1.30$, lexical: $d=1.63$). Additionally, lower post-test standard deviations in the Integrated Group indicated more consistent learning outcomes.

TABLE 3
PERFORMANCE COMPARISON BETWEEN INSTRUCTIONAL APPROACHES

Measure	Integrated Group					TBI Group				
	Pre-test (Mean/SD)		Post-test (Mean/SD)		Improvement (Cohen's d)	Pre-test (Mean/SD)		Post-test (Mean/SD)		Improvement (Cohen's d)
Total	6.43	5.72	38.17	10.44	3.77	6.29	8.24	26.19	16.97	1.49
Grammatical Collocations	3.24	2.98	18.43	5.63	3.37	3.29	4.56	11.84	8.13	1.30
Lexical Collocations	3.19	3.09	19.74	5.04	3.96	3.00	3.89	14.35	9.04	1.63

(c). *Individual Differences: Correlational Analysis*

To verify that pre-existing proficiency differences did not confound the intervention effects, Pearson correlation analyses were conducted between participants' pre-test scores and their learning gains (post-test minus pre-test scores) within each group (Dimitrov & Rumrill, 2003). This analysis addresses potential ceiling or floor effects, in which high or low initial proficiency may systematically constrain improvement (Hake, 1998).

As shown in Table 4, no significant correlations emerged in either group. The Integrated group showed a negligible negative correlation ($r = -.063$, $p = .690$), while the TBI group demonstrated a weak positive correlation ($r = .142$, $p = .445$). These non-significant relationships confirm that learning gains were independent of initial proficiency levels, supporting the validity of comparing post-test scores across groups. Both instructional approaches proved equally beneficial for learners across the proficiency spectrum.

TABLE 4
CORRELATIONS BETWEEN PRE-TEST SCORES AND LEARNING GAINS

Group	R	P
Integrated	-.063	.690
TBI	.142	.445

B. *Thematic Analysis of Student Perceptions and Evaluations of the Integrated TBI-CBI Approach*

(a). *Overview of Student Responses*

Interview data collected from seven participants revealed predominantly positive perceptions of the integrated Task-Based Language Teaching (TBLT) and Content-Based Instruction (CBI) approach to academic collocation learning. Students reported notable gains in collocation awareness, contextual usage, and confidence in academic writing. However, challenges were identified concerning collaborative dynamics, instructional pacing, and vocabulary retention.

Participant 1 explicitly connected the instructional content to academic needs, noting: *"I feel excited because, along with learning those 50 academic collocations, I am also taking a scientific research course. I expect to learn useful phrases to apply in my proposal and research mapping."* This illustrates the successful transfer of knowledge between language instruction and academic writing tasks. Nonetheless, the participant also expressed difficulties with group activities, stating: *"In the group, I only know a few members well... It makes collaboration difficult"*.

Similarly, Participant 2 described initial anxiety due to methodological unfamiliarity: *"I was very confused and scared because this was my first time learning in this way."* However, this anxiety diminished as the practical benefits of the course became apparent: *"It supports me in writing scientific reports... I confidently registered for a research project next semester."* These accounts suggest that the integrated approach holds transformative potential, particularly once learners overcome initial apprehension.

(b). *Perceived Strengths of the Integrated Approach*

1. *Pedagogical Effectiveness and Contextual Learning*

Students consistently endorsed the integrated TBLT-CBI approach for its contextualized and interactive pedagogy. Many appreciated how the instruction aligned with their academic and professional goals. Participant 1 reflected: *"Some of the collocations I learned, I actually used in my proposal, such as 'major concern'"*.

Participant 2 highlighted the benefits of collaborative revision: *"The most effective activity for me was the group work to revise our writing. In this activity, we applied newly introduced collocations to our research topic."* These responses underscore how the integrated framework supports both the acquisition and immediate application of academic collocations in discipline-specific writing tasks.

2. *Systematic Instructional Organization*

The structured delivery of collocations, organized around academic functions such as classification, results, and data collection, was widely perceived as a key strength. Participants found that such thematic categorization aided comprehension and retention. Participant 1 stated: *"When learning collocations related to classification, we broke down the topic into subcategories and identified relevant phrases. This structured approach made learning more organized and meaningful"*.

Participant 4 emphasized the engagement fostered by interactive correction sessions: *"During the correction session, the whole class participated in checking answers, making the learning process more dynamic and interactive."* These findings indicate that systematic instructional design not only enhanced lexical retention but also created a participatory classroom environment.

3. Collaborative Learning and Peer Support

Collaborative tasks, especially those involving joint writing or problem-solving, were considered valuable for reinforcing lexical knowledge and promoting peer scaffolding. Participant 5 remarked: *"Studying collocations alone can be tedious, but learning in groups makes it more engaging and helps me remember them better"*.

Participant 3 similarly observed the development of communication skills: *"Participating in group activities encouraged me to interact more, discuss with classmates, and determine the most appropriate collocations for different contexts."* Such comments illustrate how collaborative tasks can simultaneously foster lexical competence and interpersonal communication in academic contexts.

(c). Identified Limitations of the Integrated Approach

1. Collaborative Learning Challenges

Despite overall approval of group-based tasks, some participants noted issues with uneven participation and limited cohesion. For example, Participant 1 noted: *"Working in a group can be challenging because I only know a few of my teammates well... making collaboration difficult"*.

Participant 6 highlighted imbalanced contributions: *"In large groups, some students are overly active and take over the discussion, while others remain passive and contribute little."* Such issues suggest that the benefits of collaboration may be undermined if group composition and task design are not carefully managed.

2. Collocation Acquisition and Retention Difficulties

While students valued the exposure to academic vocabulary, several reported difficulties in mastering and retaining the target collocations due to lexical unfamiliarity and cognitive overload. Participant 2 observed: *"The teacher introduced many collocations I had never known before, and I struggled with pronunciation"*.

Participant 7 echoed this challenge: *"Some words were too advanced for me to understand completely... I cannot remember all the collocations taught, only about two-thirds."* These comments suggest that although the input was academically relevant, the density and complexity of the lexical items posed challenges for some learners, particularly those with limited vocabulary control.

3. Temporal Constraints and Cognitive Load

Time constraints emerged as a recurrent theme. Participants expressed concern about the limited in-class time available for both input and output tasks. Participant 5 commented: *"In a 15–30 minute activity with multiple collocations, we don't have enough time to complete the tasks"*.

Participant 3 noted: *"Some collocations have similar meanings but are used differently, so memorizing them and distinguishing their usage requires more time."* These reflections highlight the importance of instructional pacing and the necessity of sufficient processing time to facilitate deeper learning.

Overall, student feedback confirms the pedagogical effectiveness of the integrated TBLT-CBI approach in promoting academic collocation knowledge and use. The combination of task-based learning with content-focused instruction provided learners with meaningful, contextually grounded practice, contributing to improved writing performance and increased academic confidence.

Nevertheless, several refinements are recommended to optimize the instructional model:

1. **Group Management:** More deliberate group formation and role assignment may mitigate unequal participation and enhance collaboration.
2. **Vocabulary Recycling:** Incorporating more retrieval-based and spaced repetition activities may enhance collocation retention and alleviate cognitive load.
3. **Instructional Pacing:** Reducing the number of collocations introduced per session and extending class duration could support more sustained engagement with target items.
4. **Balanced Input and Output:** Increasing opportunities for oral production and written practice, alongside conceptual instruction, may strengthen both receptive and productive skills.

By addressing these areas, the integrated TBLT-CBI framework can be further refined to better support learners' lexical development and academic writing performance. Triangulation across quantitative and qualitative data sources revealed convergent patterns. Participants attributed The Integrated Group's superior outcomes ($d = 3.77$) to systematic organization, contextualized practice, and conceptual scaffolding. However, qualitative data also revealed

implementation challenges not evident in quantitative results alone: collaborative dynamics issues (uneven participation, limited team familiarity) and temporal constraints emerged across all performance levels. The gap between perceived utility ($M = 4.48$) and application confidence ($M = 3.85$) reinforces quantitative findings of substantial gains while highlighting the need for extended consolidation to support procedural knowledge development.

V. DISCUSSION

This study investigated the effects of integrating concept-based instruction (CBI) and task-based instruction (TBI) on EFL learners' academic collocational competence. The integrated approach demonstrated substantial effect sizes (total: $d = 3.77$, grammatical: $d = 3.37$, lexical: $d = 3.96$), substantially exceeding the TBI-only group's significant but more moderate effects ($d = 1.49, 1.30, 1.63$), indicating that the integrated model generated more robust and consistent improvements.

A. Integration of Cognitive and Social Dimensions

The findings support the proposition that collocational competence develops optimally through instruction targeting both cognitive depth and contextualized practice. The explicit conceptualization phase aligns with Schmidt's (2001) Noticing Hypothesis and DeKeyser's (2007) skill-acquisition framework, facilitating the transition from declarative to procedural knowledge. Through concept-based mediation, learners internalized syntagmatic and semantic constraints (Negueruela & Lantolf, 2006), while subsequent task-based cycles promoted authentic use, negotiation, and feedback (Long, 2014; Willis & Willis, 2007). This cognitive-social synergy establishes form-meaning foundations consolidated through communicative practice.

The integrated model's superiority corresponds with evidence that form-focused instruction embedded in communicative contexts yields stronger lexical learning than purely implicit exposure (Ellis, 2005a; Webb & Nation, 2017). By enabling systematic sequencing from metalinguistic awareness to task-based practice, the approach extends Peters' (2016) findings on productive collocation use following focused input. The results address the recognition-production gap highlighted by Siyanova-Chanturia and Pellicer-Sanchez (2018) and González-Fernández and Schmitt (2020), with the integrated group's effect sizes indicating more stable form-meaning mappings. Correlational analysis revealed no significant relationship between pre-test scores and gains in either group (Integrated: $r = -.063, p = .690$, TBI: $r = .142, p = .445$), suggesting both approaches benefited learners uniformly across proficiency levels, though the integrated approach produced substantially larger overall gains.

B. Theoretical and Pedagogical Implications

The findings support an interface position between explicit and implicit knowledge (Ellis, 2005a), with learners' ability to generalize collocational patterns suggesting that systematic explicit instruction can facilitate spontaneous access to declarative knowledge, a process consistent with sociocultural perspectives on concept-mediated learning (Lantolf & Thorne, 2006). The observed generalization aligns with Sweller et al.'s (2011) cognitive load theory, which posits that schema construction through structured explicit teaching reduces processing demands during language production. At the discourse level, results resonate with Hyland's (2008) view of academic literacy as socially situated practice, with meaning-making tasks anchoring collocation learning within authentic disciplinary communication (Stoller, 2004).

Three pedagogical principles emerge: (1) Sequenced design matters—concept-based explanation establishes semantic and syntactic prototypes before communicative deployment, (2) Tasks must recycle conceptual content—activities should require meaningful manipulation of target collocations within varied discourse contexts, (3) Teacher mediation is pivotal—instruction depends on dialogic scaffolding linking forms to their underlying conceptual meanings (Van Compernelle, 2014). These principles align with Cope and Kalantzis's (2016) multiliteracies pedagogy, which emphasizes the design of meaning through multiple semiotic systems.

However, qualitative findings revealed implementation challenges. Collaborative dynamics issues, including uneven participation and limited team familiarity, suggest the need for careful group composition and explicit attention to cooperative learning structures. Temporal constraints indicate that pacing adjustments and extended practice opportunities are necessary for deeper consolidation and bridging conceptual understanding with productive deployment in learners' own academic writing.

C. Limitations and Future Directions

Several limitations warrant acknowledgment: the eight-week duration restricts claims about long-term retention, the discrete-item test format may not fully capture contextualized language use, the single institutional setting limits generalizability, the absence of an explicit-instruction-only control group constrains causal inferences, and potential Hawthorne effects and individual differences could have influenced performance.

Future research should explore the model's operation across proficiency levels and linguistic domains through longitudinal designs tracing durability and transferability to extended writing tasks (Wray, 2002; Nation, 2013). Classroom-based studies examining teachers' mediational strategies and learners' self-regulation processes would refine pedagogical implementation.

VI. CONCLUSION

This study demonstrates that an integrated cognitive-social instructional sequence significantly enhances EFL learners' academic collocational competence compared to task-based instruction alone. The substantial effect sizes ($d = 3.77, 3.37, 3.96$) attest to the effectiveness of combining concept-based instruction with task-based performance, addressing the persistent recognition-production gap identified in previous research.

The findings suggest that conceptual awareness and contextualized use function as complementary mechanisms: learners internalize rule-based knowledge through explicit conceptualization and appropriate this knowledge through authentic communicative engagement. This interaction represents a generalizable principle for fostering complex language abilities, operationalizing the multiliteracies framework through systematic sequencing of experiencing, conceptualizing, analyzing, and applying.

Despite acknowledged limitations, the study's robust effect sizes and triangulated data provide compelling evidence for the integrated approach's effectiveness, offering a principled alternative to the dichotomy between explicit vocabulary instruction and communicative practice. Future research exploring the model's scalability across diverse contexts will further determine its broader applicability in EFL/ESL academic writing instruction.

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Examining Digital Literacy of Indonesian High School Students: Digital Safety and Cultural Awareness in EFL Learning

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Abstract—This study investigates the digital safety and cultural awareness of English as a Foreign Language (EFL) students in Indonesia, assessing their current awareness levels and pinpointing critical areas necessitating additional focus. The study utilizes a descriptive quantitative design, employing a questionnaire to evaluate students' comprehension of diverse digital safety practices and cultural dimensions. The findings indicate that although students demonstrate considerable awareness of Email and Password Security, notable deficiencies exist in Geolocation Privacy and Data Backup. Furthermore, Ethnic Sensitivity and Political Sensitivity exhibited diminished levels of awareness. It signifies a necessity for more concentrated education in these domains. This study enhances the existing research on digital literacy by incorporating digital safety and culture within the framework of EFL education. The findings highlight essential aspects of digital literacy that necessitate additional intervention and emphasize the significance of integrating thorough digital education into the EFL curriculum. Subsequent research should concentrate on formulating targeted interventions to rectify these deficiencies and evaluate the influence of digital safety and cultural education on students' academic and social involvement.

Index Terms—examining, digital literacy, Indonesian students, digital safety, cultural awareness, EFL learning

I. INTRODUCTION

The fast development of digital technology has dramatically altered educational environments across the globe, especially EFL classrooms (Du, 2023; Pratiwi & Waluyo, 2023). A key component of modern education is digital literacy, which equips students to effectively use digital resources for their own academic and personal development (Hidayat et al., 2022; Irwandi et al., 2023; Sur, 2022; Eshet, 2012; Ng, 2012). For students to participate in the online world responsibly and securely, they must develop digital literacy skills, including cultural awareness and digital safety (Gayyur, 2021; Jones & Hafner, 2021). Teaching students digital literacy, particularly safety and cultural awareness, is crucial because digital platforms are becoming more integrated into EFL classrooms (Hawamdeh et al., 2022; Buckingham, 2015). Nevertheless, many students in non-native English-speaking countries, such as Indonesia, struggle to understand digital communication's cultural nuances and adopt secure digital practices (Rouf, 2022; Riyanto & Widyastuti, 2020).

One of the biggest EFL-learning nations, Indonesia, has seen an exponential rise in the usage of digital tools in language education (Fitria, 2021; Hidayat et al., 2022). To improve students' capacity to engage in online environments, the Indonesian government has aggressively supported digital literacy initiatives (Pratolo & Solikhati, 2020; Kemendikbud, 2021). However, rather than stressing critical elements like digital safety and cultural awareness, digital literacy in EFL education has concentrated chiefly on technical skills, including information retrieval and digital tool usage (Nguyen & Habók, 2021; Puspitasari et al., 2022). Cultural awareness is essential in EFL learning since it affects students' view of global aspects and promotes intercultural competency, given the varied sociocultural scene of Indonesia (Prihatiningsih et al., 2021; Kirkpatrick, 2017). Moreover, digital safety is still a topic of worry, as among Indonesian students, cyberbullying, false information, and privacy violations are rising (Hidayat & Marlene, 2021; Alvermann, 2018).

Despite abundant studies examining digital literacy in EFL settings, research on the relationship between cultural awareness and digital safety among Indonesian high school students is limited. Previous research has focused on digital literacy in broad strokes, ignoring how students understand and use digital safety measures in language learning contexts (Lemieux, 2021; Manik, 2022; Warschauer & Matuchniak, 2010). Comparatively, there has been some research on cultural awareness in digital communication in general education, but not much on how Indonesian EFL students deal with cultural differences when interacting online (Hidayat et al., 2022; Pratolo & Solikhati, 2020; Prawati, 2020; Lee, 2020). Furthermore, most current literature fails to thoroughly examine the instructional approaches that could unite cultural sensitivity with digital safety in EFL instruction (Godwin-Jones, 2019; Nabhan, 2021; Nugroho et al., 2022). Due to a dearth of studies, we must inquire into the perspectives and practices of Indonesian EFL high school students regarding digital safety and cultural awareness in the classroom.

This study presents a fresh perspective by investigating the two aspects of digital literacy—digital safety and cultural awareness—in the unique setting of Indonesian EFL high school students. While most studies have examined digital safety and cultural awareness independently, the current study thoroughly examines the interplay between the two in language acquisition. Looking at an understudied aspect of digital literacy in Indonesia, this study adds to our understanding of how cultural awareness and digital safety might improve EFL education—studying how cultural awareness and digital safety impact digital literacy among Indonesian EFL high school students is a significant research gap that this study seeks to address. This research contributes to our theoretical knowledge of digital literacy in language learning by studying all these aspects simultaneously. It also offers practical insights for researchers, educators, and policymakers who want to improve digital education in EFL settings.

II. LITERATURE REVIEW

Digital literacy is essential in contemporary education, particularly in the current digital environment where students must comprehend not only the usage of technology but also its ethical and cultural dimensions (Antoniuk & Zasiadivko, 2023; Gilster, 1997; Khan, 2018; Tran et al., 2020). As technology becomes essential to everyday life, understanding its responsible use is crucial (Ben-Jacob & Glazerman, 2021; Yehya, 2021). This section examines essential ideas of digital literacy, digital safety, and digital cultural awareness within the framework of EFL instruction in Indonesia.

A. *Digital Literacy in Education*

Digital literacy denotes the capacity to proficiently and analytically utilize digital tools and technology to locate, assess, generate, and disseminate information (Gilster, 1997; Hague & Payton, 2011; Joseph & Khan, 2020). Bawden (2008) emphasizes that digital literacy includes many competencies, such as technical expertise, information management, and ethical utilization of digital platforms. In EFL instruction, digital literacy encompasses more than only utilizing digital resources for English language acquisition (Hidayat et al., 2021; Perdana et al., 2019). It entails instructing students on responsible engagement with online content, effective communication in digital environments, and awareness of the consequences of their digital activities (Joseph & Khan, 2020; Li et al., 2020).

Ng (2012) highlights the significance of digital literacy in language instruction, mainly as it enhances students' capacity to engage with native speakers, access genuine materials, and practice their language abilities via digital platforms. In Indonesia, where English is a foreign language, digital resources such as language study applications, online communication platforms, and digital dictionaries can substantially improve the learning experiences of EFL students (Nartiningrum & Nugroho, 2020; Puspa et al., 2022). Students must be instructed in using these tools and in their ethical and responsible engagement with them (Sur, 2022; Yu & Nazir, 2021).

B. *Digital Safety Awareness*

Digital safety awareness is crucial to digital literacy, especially when students face several online threats, including data breaches, cyberbullying, and identity theft (Lemieux, 2021; Moon, 2018; Tran et al., 2020). Livingstone (2018) asserts that digital safety encompasses various behaviors, including safeguarding personal information, managing privacy settings, and recognizing the dangers associated with cyber threats. In Indonesia, where internet usage is expanding swiftly, knowledge of digital safety is crucial, as numerous students, particularly in rural regions, may not receive adequate instruction on safeguarding their personal data and online engagements (Abror et al., 2021; Amin et al., 2021; Siwi & Fitri, 2021).

Sutanto et al. (2021) found that Indonesian students demonstrate disparate levels of digital safety awareness, possessing more knowledge of password security and social media privacy but exhibiting diminished comprehension of more sophisticated practices like Geolocation Privacy and Data Backup. This underscores a critical deficiency in the education system that must be rectified to enable students to safeguard themselves in the increasingly intricate digital landscape. In EFL instruction, digital safety awareness is essential for students' protection and ability to participate safely in online language learning platforms (Du, 2023; Nguyen & Habók, 2021). Educators should integrate conversations on digital safety into their curriculum, ensuring that students are skilled in English and possess the skills to safeguard themselves in the digital environment (Rouf, 2022).

C. *Digital Culture Awareness*

Digital culture awareness encompasses comprehending cultural norms, behaviors, and ethical issues within digital environments (Cavalcanti et al., 2022; Ming, 2022). It encompasses proficient communication within a globalized digital context. Hague and Payton (2010) contend that awareness of digital culture is crucial for students to manage many contradictory cultural norms. This encompasses Communication Style Adaptation, Ethnic Sensitivity, and Political Sensitivity in digital interactions. In Indonesia, characterized by extensive cultural diversity, awareness of digital culture is essential (Diagnostic Report: Digital Skills Landscape in Indonesia, 2024; Yusuf et al., 2021). EFL students must learn to utilize digital tools and engage with cultural perspectives respectfully (Laoebela et al., 2023). The current study's deficient results in domains such as Ethnic and Political Sensitivity indicate a need for targeted education addressing these intricate online topics. Miller et al. (2016) assert that cultural sensitivity is essential for averting misinterpretation and conflict in global digital environments.

D. Implications for EFL Teaching in Indonesia

Incorporating internet safety and cultural awareness into the EFL curriculum is vital. Yusoff and Ahmad (2023) emphasize that digital literacy, encompassing safety and cultural awareness, should be integrated into language teaching. This assists students in navigating the digital realm and participating ethically in global communication (Perdana et al., 2019). In Indonesia, where English is a foreign language, integrating digital cultural awareness assists students in comprehending the global aspect of language acquisition and communication (Salim & Hanif, 2021). It also equips them to navigate cultural disparities and ethical dilemmas in global interactions (Khoirunisa, 2020; Wang, 2018).

Based on the findings, EFL educators in Indonesia must incorporate internet safety and cultural education into their instruction. This can be accomplished by modifying the curriculum to include instruction on safe internet usage, privacy, and respectful online communication (Selpia & Purnawarman, 2021). Moreover, promoting discourse on cultural disparities, political awareness, and the ethics of digital communication will equip students for a globalized environment (Ananto & Ningsih, 2023; Suwito et al., 2024). Rectifying these deficiencies will empower the Indonesian educational system to cultivate adept English speakers and conscientious digital citizens (Lauder, 2020; Wijayanti et al., 2023).

III. RESEARCH METHOD

A. Research Design

This research utilizes a descriptive quantitative methodology, which is ideal for assessing the present condition of digital safety and digital culture awareness among EFL students in Indonesia. A descriptive research design facilitates the collection of comprehensive numerical data to evaluate students' awareness levels and to pinpoint current deficiencies. The study seeks to elucidate students' awareness levels concerning digital safety and culture, emphasizing privacy, security procedures, and cultural sensitivity in digital environments. The study used a quantitative technique to produce statistically significant findings that can be extrapolated to a broader group of EFL students.

B. Setting and Participants

This research was conducted at SMA Negeri 1 Halmahera Utara in eastern Indonesia. The study sample comprises 75 EFL students in the third grade for the school year 2024-2025. The students were chosen by purposive sampling, ensuring the sample reflects diverse origins. Purposive sampling facilitates a comprehensive understanding of digital safety and cultural awareness among varied student groups, considering socio-economic status, rural location, and educational attainment. The students were chosen according to their participation in the English language class, guaranteeing that the study concentrates on the EFL setting. The sample size was established according to the required statistical power for analysis, with an acceptable margin of error for this research type.

C. Instrument

The principal instrument for data gathering in this study is a survey questionnaire. The instrument, derived from the Ministry of Communication and Informatics of the Republic of Indonesia (Kominfo), was explicitly constructed to assess the digital literacy index and knowledge of digital safety and culture in Indonesian society. The poll comprises two primary sections: one addressing digital safety, and the second addressing digital culture. The digital safety component of the questionnaire has eight indicators: Social Media Privacy Control, Reporting Abuse, Geolocation Privacy, Personal Data Privacy, Virus Protection, Email Security Awareness, Password Security, and Data Backup. These indications regarding digital safety practices and internet security protocols were derived from Kominfo. The digital culture component of the questionnaire comprises seven indicators: Communication Style Adaptation, Religious Sensitivity, Attribution of Authors, Ethnic Sensitivity, Cultural Promotion, Political Sensitivity, and Cultural Diversity Acknowledgment, among others. As delineated in prior studies, these elements are grounded in digital culture and online ethics frameworks.

The questionnaire has undergone validation via expert review and a pilot study, incorporating feedback from digital literacy instructors and linguists to guarantee the relevance and clarity of the questions. The test employs a Likert scale for response alternatives, spanning from "Strongly Agree" to "Strongly Disagree," facilitating a spectrum of responses that indicate differing levels of awareness.

D. Procedure

The data collection technique was conducted using survey questionnaires. It was disseminated to students through a Google Form. Before distribution, students were informed about the study's objective, and their responses were guaranteed to be kept anonymous. The researchers confirmed that the students comprehended the items in the questionnaire, particularly those about technical aspects of digital safety and cultural matters. The questionnaires were completed in roughly 20 to 30 minutes, allowing students the time to contemplate their comprehension and habits concerning digital safety and culture. The researchers underscored the significance of candid and reflective responses to guarantee a high response rate and mitigate bias. Upon gathering the completed surveys, the researchers assessed them for completeness, excluding any incomplete or inconsistent ones, ensuring the data's dependability.

E. Data Analysis

Data analysis utilized descriptive statistical methods, concentrating on central tendency and variability measures. The subsequent actions were executed:

(a). Descriptive Statistics

The mean, median, and mode were computed for each indication to ascertain the average level of awareness regarding various facets of digital safety and culture. These measurements elucidated the general trend in students' awareness, with the mean functioning as the principal signal of central tendency.

(b). Standard Deviation

Each indicator's standard deviation was determined to evaluate the variability in student responses. A high standard deviation signifies increased variability in students' awareness, whereas a low standard deviation shows higher uniformity in the data.

(c). Frequency Analysis

The percentage distribution of responses for each item was computed to ascertain the proportion of students exhibiting high, medium, or low levels of awareness in each domain. This facilitated the identification of distinct locations where students exhibited notably high or low levels of awareness.

IV. RESULTS

A. Results of Digital Safety

The findings of the descriptive analysis concerning the digital safety of 75 EFL students at SMA Negeri 1 Halmahera Utara, Eastern Indonesia, are displayed in the subsequent table.

TABLE 1
THE RESULTS OF DESCRIPTIVE ANALYSIS OF EFL STUDENTS' DIGITAL SAFETY

Component Analysis	Results
Mean	24,89
Standard Error	0,73
Median	25,00
Mode	25,00
Standard Deviation	6,29
Total sample	75

The analytical examination of digital safety among EFL students reveals an average score of 24.89, signifying moderate digital safety knowledge. This score indicates a basic grasp of essential digital safety principles, while their comprehension of topics such as virus prevention, personal data privacy, and email security may be superficial. The standard error of 0.73 indicates a negligible margin of error and uniformity in responses. Although this indicates a degree of homogeneity, it does not imply uniformity in digital safety knowledge across students; individual students may surpass or lag behind the average. The median and mode values of 25.00 confirm the central tendency of the scores. The equality of the median and mode signifies that most students' digital safety knowledge is centered on 25, marginally exceeding the mean. This indicates that numerous students achieved scores in the upper middle range of the scale, but a minority scored lower, influencing the modest mean. This pattern exhibits a normal distribution, with students predominantly scoring close to the median and demonstrating variability at the extremes.

The score distribution conveys a need for tailored solutions. Students at the lower end of the spectrum may require further teaching and hands-on experience with digital safety standards. In contrast, those at the upper end could benefit from more advanced discussions and strategies about online threats and privacy concerns. A heightened emphasis on personal accountability, digital ethics, and proactive protection may improve EFL students' overall understanding of digital safety. Subsequently, the frequency analysis data specified the percentage of each indication as follows:

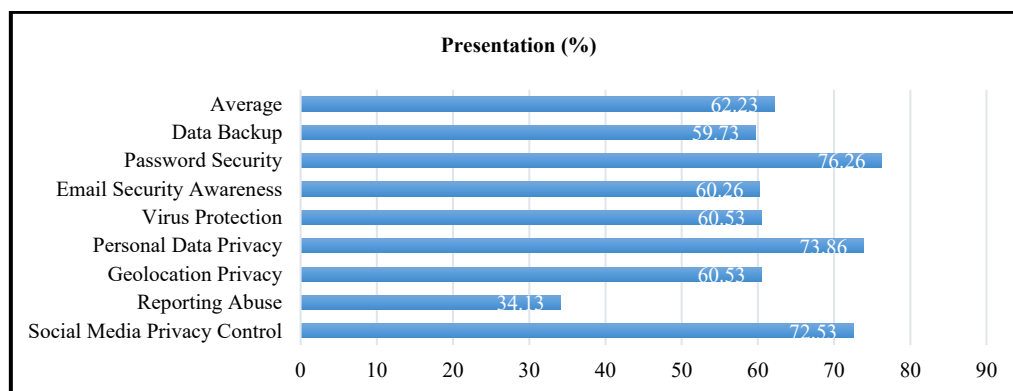


Figure 1. The Presentation of EFL Students' Digital Safety per Indicator

The analysis of digital safety in Figure 1 reveals that EFL students demonstrate varying levels of knowledge and application across multiple digital safety criteria, with some areas showing significant competency and others indicating possible gaps in understanding. Email Security Awareness and Password Security demonstrate commendable scores of 78.66% and 78.13%, respectively, at the highest tier. The numbers demonstrate that EFL students can safeguard their email accounts and online credentials. Given the increase in cyber-attacks, data breaches, and phishing attempts, it is reassuring that students comprehend the significance of formulating robust passwords and identifying risks in email communications. These procedures are essential for guaranteeing internet security, and the students' understanding reflects a proactive strategy for protecting their data. Virus Protection (73.86%) and Social Media Privacy Control (76.53%) closely follow, indicating a thorough comprehension of security measures against prevalent online threats, such as viruses and malware. The increased awareness of social media privacy indicates that students acknowledge the dangers of disclosing personal information on these sites and are proactively adjusting their privacy settings. The marginally diminished score for Virus Protection indicates that although students recognize the significance of antivirus software, there exists an opportunity for enhanced education on sophisticated online threats, including malware and phishing strategies.

The following category comprises Geolocation Privacy and Data Backup, with the lowest scores of 60.53% and 59.73%, respectively. These regions underscore the necessity for enhancements in students' digital safety practices. Geolocation privacy is frequently neglected, notwithstanding the dangers associated with location-tracking functionalities in mobile applications. The restricted awareness indicates that students may not comprehensively grasp the dangers of disclosing their whereabouts, potentially rendering them susceptible to tracking or exploitation. Likewise, the data backup score indicates a deficiency in recognizing the significance of protecting digital material. Insufficient backup measures might result in losing essential files due to system malfunctions, cyber-attacks, or unexpected occurrences. This gap necessitates enhanced data security and backup education, enabling pupils to retrieve information during emergencies.

B. The Results of Digital Culture

The findings of the descriptive analysis of the digital culture of 75 EFL students at SMA Negeri 1 Halmahera Utara, Eastern Indonesia, are as follows:

TABLE 2
THE RESULTS OF DESCRIPTIVE ANALYSIS OF EFL STUDENTS' DIGITAL CULTURE

Component Analysis	Results
Mean	30,32
Standard Error	0,18
Median	31,00
Mode	31,00
Standard Deviation	1,59
Total sample	75

The descriptive statistics for digital culture among EFL students reveal a mean of 30.32, signifying a considerable understanding of digital culture. This score indicates that EFL students know digital culture's norms, values, and practices. However, they may lack comprehension of certain cultural subtleties, including political and religious sensitivities and cultural diversity. The standard error of 0.18 is minimal, indicating reliable data. Most students exhibited similar scores, demonstrating a consistent distribution of digital culture understanding within the sample. This indicates a comprehensive grasp of digital culture, with minimal individual divergence. The decreased error margin indicates that the mean score accurately represents the student population's perspective on digital culture. The median and mode values of 31.00 indicate that numerous students achieved scores close to the highest limit of the scale, exceeding the mean. This indicates that numerous students possess a robust awareness of digital culture, especially concerning communication modalities and cultural advocacy. The results are encouraging, indicating substantial involvement with digital cultural norms, suggesting that students recognize the significance of respectful online interactions and the value of cultural variety. A

standard deviation of 1.59 is minimal, signifying that the scores are tightly clustered around the mean, exhibiting minimal fluctuation. This indicates a uniformity in students' awareness of digital culture. Nonetheless, certain facets of digital culture—such as ethnic or political sensitivity—may remain underdeveloped among a subset of students, potentially resulting in misunderstandings in online contexts where political and ethnic matters are increasingly significant.

The high mean, median, and mode scores in digital culture indicate that most students are aware of digital culture and interact with it competently. However, there is a need for further education to address certain aspects, such as the acknowledgement of cultural diversity and political awareness, which may be overlooked or inadequately emphasized in the current curriculum. Digital platforms are ever-evolving, necessitating that students remain cognizant of cultivating culturally sensitive and socially acceptable online interactions. The subsequent data pertains to frequency analysis as follows:

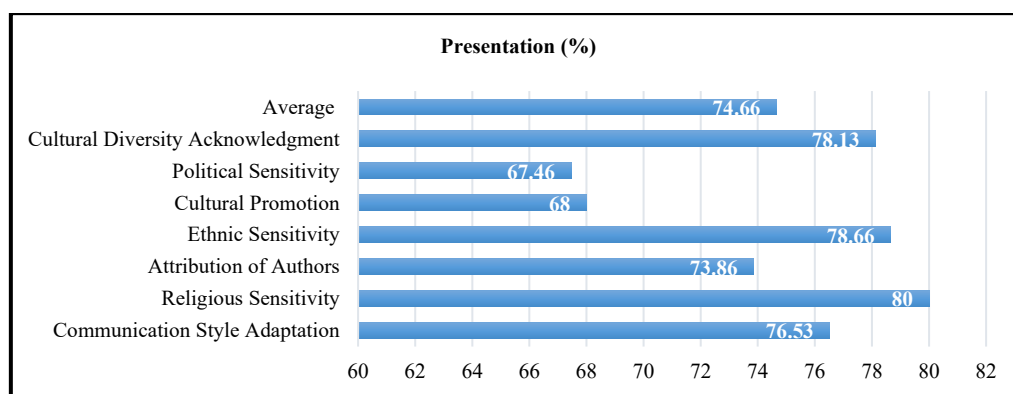


Figure 2. The Presentation of EFL Students' Digital Culture per Indicator

Figure 2 demonstrates the outcomes of digital culture, highlighting differing levels of awareness, with some elements demonstrating superior ability. Communication Style Adaptation (80%) and Cultural Promotion (78.66%) are notable strengths. Students demonstrate proficiency in adjusting their communication style in digital environments, which is essential for global online interaction. The elevated score for cultural promotion indicates students' comprehension of enhancing cultural awareness and diversity online, which is essential for inclusive digital spaces. This underscores the significance of cultural awareness in the contemporary interconnected globe. Religious Sensitivity (76.53%) and Attribution of Authors (74.66%) indicate students' comprehension of digital ethics and cultural dimensions. Religious sensitivity underscores the importance of respecting varied views in internet interactions. The attribution of authorship demonstrates students' awareness of intellectual property rights in digital environments, reflecting a fundamental comprehension of essential cultural and ethical practices in the digital era.

The research indicates shortcomings in Ethnic Sensitivity (67.46%) and Political Sensitivity (68%), highlighting areas where students require further development in comprehending the interaction of ethnicity and politics in digital contexts. Ethnic sensitivity is essential to avert detrimental stereotypes and foster respectful internet connections. Political understanding is essential for participating in courteous online political discourse, acknowledging varied perspectives while circumventing confrontation and misinformation. The diminished scores indicate that students may not wholly comprehend the implications of engaging in sensitive online debates. The average score of 72.53% in digital culture indicates a commendable comprehension, yet with potential for enhancement in digital communication and cultural awareness. The deficiencies in ethnic and political awareness underscore the necessity for enhanced education to promote more polite and informed internet interactions.

In the final analysis, the data regarding digital safety and culture reveal that EFL students possess a strong foundation in essential digital skills; however, notable deficiencies are present in aspects such as geolocation privacy, data backup, ethnic sensitivity, and political sensitivity, warranting additional educational and awareness efforts. Addressing these inadequacies will improve students' capacity to navigate the digital security landscape and the complex cultural dynamics of the online domain.

V. DISCUSSION

The results from the descriptive statistics and frequency analysis of digital safety and digital culture among EFL students in this study provide significant insights into the present condition of digital literacy in Indonesia, especially among high school students. As digital technology progressively influences education, comprehending student engagement with digital safety and culture is essential. This research emphasizes significant aspects of digital awareness and identifies crucial deficiencies that necessitate focus, especially considering prior studies.

A. Digital Safety Awareness

The descriptive statistics indicate that EFL students possess moderate digital safety awareness, demonstrating notable strengths in Email Security Awareness, Password Security, and Virus Protection. The elevated scores in these domains

indicate a robust comprehension of fundamental principles for protecting personal information online, consistent with other research. Sutanto et al. (2021) indicated that Indonesian students were somewhat aware of online security, especially password management and virus prevention. Chandra et al. (2022) similarly discovered that high school students in Southeast Asia were growing aware of the necessity for secure online practices, including using robust passwords and antivirus software.

Nonetheless, the results of this investigation also disclose significant deficiencies, especially in Geolocation Privacy and Data Backup. These indicators demonstrated minimal understanding, which is alarming considering the growing significance of these practices in safeguarding personal data in the digital era. Geolocation privacy is frequently neglected even though location tracking on mobile devices might subject individuals to considerable dangers, such as stalking and privacy breaches (Tung et al., 2021). This disparity indicates that although students may comprehend fundamental privacy issues, they may not entirely comprehend digital privacy's extensive dimensions. Similarly, data backup is a crucial domain that students seem to overlook, potentially resulting in the loss of significant academic and personal information due to system failures or cyber-attacks (Das et al., 2021).

This is in comparison to the findings of Sutanto et al. (2021), who recognized analogous concerns with the limited awareness of geolocation privacy among Indonesian students. This study enhances the comprehension of the prioritization of specific internet safety behaviors among EFL students. The results demonstrate that although there is a broad knowledge of digital safety, there is a considerable necessity to underscore more extensive privacy and data protection strategies in educational curricula.

B. Digital Culture Awareness

The findings about digital culture indicate a predominantly favorable outlook, with students demonstrating significant awareness in domains such as Communication Style Adaptation and Cultural Promotion. These indicators demonstrate students' capacity to interact with digital environments in a culturally sensitive and appropriate manner. This is especially significant in the context of English as a Foreign Language (EFL), as learners must contend with both linguistic disparities and cultural subtleties when engaging with native speakers or diverse global audiences (Irwandi et al., 2023; Véliz & Véliz-Campos, 2023). The students' heightened knowledge of Cultural Promotion indicates their comprehension of the significance of showcasing their culture in digital environments. It is a crucial competency as digital platforms increasingly function as instruments for cross-cultural engagement (Yusoff & Ahmad, 2023).

However, results underscore domains where students require additional assistance, including Ethnic and Political Sensitivity. These indicators exhibited comparatively lower ratings, indicating a deficiency in students' capacity to negotiate digital environments where ethnic and political concerns frequently arise. This discovery aligns with the research conducted by Simatupang et al. (2021), which indicated that Indonesian students, especially in rural regions, face difficulties comprehending the intricacies of ethnic and political sensitivities in digital environments. The comparatively diminished scores for Ethnic Sensitivity and Political Sensitivity in this study highlight the necessity for more focused instruction on these topics to equip students for respectful engagement with other perspectives (Lauricella et al., 2020; Ma et al., 2023).

This study increases existing literature by offering a more profound insight into the intersection of students' cultural awareness and their digital practices, in contrast to earlier research by Tung et al. (2021) and Simatupang et al. (2021), which identified comparable gaps in sensitivity to political and ethnic matters. The results indicate that digital culture education must be more inclusive, promoting understanding of sensitive issues such as race, politics, and religion, especially within Indonesia's rich social fabric.

C. Originality and Contribution to English Language Learning

This study significantly contributes by examining the interaction of digital safety, digital culture, and English language acquisition. This study addresses the necessity for a comprehensive understanding of how students navigate digital environments, considering both safety and cultural awareness, in contrast to prior research that predominantly concentrated on the technical facets of online safety and the general application of digital tools in education. The study's emphasis on EFL students is particularly pertinent, as digital literacy is essential for language acquisition in the contemporary interconnected world.

Amin (2022) argues that digital literacy encompasses the proficiency in utilizing technology and the comprehension of digital interactions' ethical and cultural ramifications. The outcomes of this study indicate that incorporating digital safety and digital culture into the English language curriculum is crucial for equipping students to utilize technology responsibly and efficiently. By cultivating technical expertise in digital safety and cultural awareness in digital interactions, educators can guarantee that students are proficient in utilizing digital tools while also becoming responsible global citizens cognizant of the cultural and ethical aspects of their online engagements (Ananto & Ningsih, 2023; Muthoifin & Rhezaldi, 2024).

This study's findings underscore the necessity for targeted initiatives in digital safety education, especially concerning Geolocation Privacy and Data Backup. By including these essential elements in the English language learning curriculum, educators can facilitate students' development of a more thorough comprehension of digital literacy (Jackman et al., 2021; Joseph & Khan, 2020). Moreover, by integrating talks on Ethnic Sensitivity and Political Sensitivity, educators can foster

a more inclusive and courteous digital culture, essential for EFL students who must interact with varied audiences in academic and social settings.

VI. CONCLUSION

This study thoroughly examines digital safety and digital cultural awareness among EFL students in Indonesia, highlighting strengths and deficiencies in their comprehension. The results indicate that students demonstrate considerable awareness in domains such as Email Security, Password Security, and Communication Style Adaptation. However, essential areas like Geolocation Privacy and Data Backup necessitate additional focus. The study identifies a deficiency in Ethnic Sensitivity and Political Sensitivity, emphasizing the necessity for more sophisticated education in these domains to promote courteous and inclusive digital interactions. This study's originality stems from its dual emphasis on digital safety and digital culture in English language acquisition. The study prioritizes incorporating cultural and ethical dimensions into digital education, contrasting with earlier studies that mainly concentrated on the technical facets of digital literacy. This methodology provides a comprehensive insight into students' navigation of the digital realm and emphasizes the necessity of instructing both digital literacy's technical and cultural aspects. Future research should investigate interventions designed to enhance knowledge of Geolocation Privacy and Data Backup among EFL students. Moreover, subsequent research should investigate the effects of specialized education on Ethnic Sensitivity and Political Sensitivity, evaluating its impact on students' participation in digital platforms in a culturally respectful and responsible way.

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Repressed Desires and Trauma in Al-Humaidan's and Al-Hamad's Novels: A Psychoanalytic Reading of Inner Conflict and Repression

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Abstract—This essay draws on Sigmund Freud's psychoanalytic perspective, among others, to explore Ibrahim al-Nasser al-Humaidan's *Ghuyum al-Kharif* (1988) and Turki al-Hamad's *Juruh al-Thakirah* (2002). The basic argument is that the psychological turmoil of the characters, Muhaisin and Latifah, in particular, stems from a dual impulse: a desire to adopt Western norms and a simultaneous fear of cultural dislocation. The study shows that these works ostensibly depict the psychological impact and consequences of social transformation in Saudi Arabia, illustrating how rapid shifts in cultural, political, and gender norms infiltrate individual consciousness and collective identity, resulting in psychological tension, inner conflict, and evolving understandings of how individuals perceive their own identity. It further shows that both texts emphasize that the psychological conflict depicted in both texts seems to arise from a strong attachment to cultural traditions, which are deeply internalized and come into conflict with changing social realities.

Index Terms—*Ghuyum al-Kharif*, *Juruh al-Thakirah*, psychoanalysis, repression, trauma

I. INTRODUCTION

Saudi Arabia has undergone profound social and cultural changes over the past several decades, particularly following the discovery of oil. These rapid changes shifted the Saudi landscape from traditional rural life to a modern, urban society (Alkodimi & Thabet, 2026, p. 1). However, this caused significant psychological effects on many Saudi citizens, who found themselves torn between embracing modernization and maintaining traditional values (Alshammari, 2017; Alwuraafi, 2021). Literature, as a reflection of society, often serves as a space where these transformations are examined, debated, and internalized. Many prominent Saudi novelists have chosen to explore the psychological effects of the swift social and economic changes in the post-oil-discovery era—among them, al-Humaidan and al-Hamad stand out as notable examples. As Al Farhan and Al Raddadi (2023) point out, “the rise of the novel in this context depicts the impact of the rapid modernization of these societies and how it produces a sense of fragmentation of the self and society” (pp. 1–2).

Ibrahim al-Nasser al-Humaidan's *Ghuyum al-Kharif*, translated as [Autumn Clouds], and Turki al-Hamad's *Juruh al-Thakirah*, translated as [Wounds of Memory], powerfully depict the psychological impact of those social changes upon individuals and society at large. Through striking imagery and character development, these works of literature powerfully illustrate the profound impact of those shifting social dynamics on personal identity and collective consciousness. Al-Humaidan, in *Ghuyum al-Kharif* (1988), for instance, seems to hint very early at this social problem when Muhaisin, the narrator protagonist, raises a serious question: “Is money a cause of disorder and distraction?” (p. 46). Such a question implicitly reflects his mental/psychological agony. Perhaps this is why he seeks to see a psychiatrist (p. 46). Muhaisin believes that the oil flow marked the advent of a new turning point in the history and life of the Saudi people (p. 49). He thinks that it caused “a great civilizational leap that he never dreamed of living” (p. 25). Indeed, he thinks it is a “crazy leap” (p. 101). This leads him to contemplate whether an ethical crisis will appear due to this economic boom (p. 89). Muhaisin concludes that “the magic of money overshadowed all values” (p. 137).

Similarly, Latifah's early comments in *Juruh al-Thakirah* by al-Hamad (2002), on the new life and its economic and social changes, clearly imply that the main concern of the novel is the psyche of its characters. “It is not what is happening around us that matters, but what is happening within us,” Latifah said (p. 19). Like Muhaisin, in *Ghuyum al-Kharif*, Latifa, the protagonist in *Juruh al-Thakirah*, undergoes a long psychological therapy in Riyadh, California, and Beirut (pp. 145, 168, 183). Indeed, the opening of al-Hamad's *Juruh al-Thakirah* reflects the novel's engagement with the psyche of its characters. It opens with a quotation from the Belgian psychotherapist Pierre Daco's famous book *Les Prodigieuses Victoires de la Psychologie Moderne* (*The Amazing Victories of Modern Psychology*), translated into Arabic by Wagih Asaad in 1988:

Life passes, and its development continues slowly ... A balanced man should let an unfavorable circumstance slip away smoothly. As for a favorable circumstance, he is required to utilize it ... Those who are incapable of

utilizing an adequate circumstance are prisoners of mental paralysis, who are afflicted with internal distortions. (Al-Hamad, 2002, p. 9)

Hence, these opening lines de facto foreshadow the content of the text that strikingly provides vivid depictions of the psychological conditions that many citizens have experienced due to the economic boom that the kingdom passed through in the post-oil era, the 1950s, and beyond.

Yet, the psychological dimension becomes more pronounced when Dr. Ayman, another character, articulates the adverse effects of the new lifestyle on mental well-being to the protagonist while providing her medical treatment, stating that “the psychological illnesses are a result of the new era we are living in,” to which she wholly agrees (p. 76). Furthermore, Saleh, Latifa’s husband’s powerful comment almost sums up the whole idea when he explains the case his wife is undergoing to his friend, Sulieman, the latter laughs and says that “maybe a day will come and the whole country will become a sanitarium or a mental hospital” (p. 117). Sulieman adds that Saleh is the fifth person among people whom he knows who has a similar issue at their homes. Hence, these comments and views by these different characters clearly show that the major theme of these two significant novels is the representation of the psychological impact of the economic boom on Saudi society during the second half of the twentieth century.

Arguably, *Ghuyum al-Kharif* and *Juruh al-Thakirah* do not simply reflect external societal changes; rather, they delve into the interior lives of individuals navigating these shifting paradigms. This essay contends that both texts ostensibly depict the psychological consequences of Saudi Arabia’s evolving social fabric, offering nuanced portrayals of anxiety, alienation, internalized conflict, trauma, and resilience as individuals confront the dissonance between tradition and modernity.

II. LITERATURE REVIEW

Several studies have been conducted on the Saudi novels that reflect the psychological impact of the economic boom on individuals and society. One of the earliest studies that applied the psychological approach to Saudi fiction is Sami Juraidi’s *Al-riwaya al-nisa’iya al-Sa’udiyya: Khatib al-mara’a wa-tashkil al-Sard*, 2008 [The Saudi Women’s Novel: Female Discourse and Narrative Formation]. He employs the stream of consciousness technique to examine the narrative formation of Saudi female fictional discourse from 1958 to 2008. In ‘*The City and Social Transformations in Arabic Literature: The Saudi Novel as Case Study* (1980-2011),’ Alfauzan (2013) explored several aspects in Saudi fiction, among them is the psychological impact of social changes in modern Saudi Arabia. He states that one of the prominent characteristics of Saudi fiction during the concerned period is its capability to discern the social transformations “not only from the historical and political perspectives, but also from within the fabric of civil society and in terms of the psychological effects” (p. 97). This view is shared by Al-Abdullah (2013), who states in his book *Tajaliyat Al-Hadathah fi Al-Riwayah Al-Saudiyyah Al-Mo’asirah* [Manifestations of Modernity in Contemporary Saudi Novel] that “in the modern Saudi novel one can find different colors inspired by serial, existential and psycho-analytical imagination” (p. 13), quoting some prominent modern experimental Saudi novelists like Turki Al-Hamad, Abdo Khal, Ghazi Al-Qosaibi, among others.

Alshammari (2017), however, conducted a comparison between Saudi and American postmodern novels, and subsidiarily attempted a psychological analysis of some Saudi novels, among them *The Dove’s Necklace* (2010) by Raja’a Alem, *Throwing Sparks* (2009) by Abdo Khal, *Girls of Riyadh* (2007) by Rajaa Alsanea, and *Life on Hold* (2004) by Fahd al-Atiq. He illustrates how “Americanization and cultural globalization” shaped Saudi personality to the extent of making a character “a schizophrenic person” (p. 115), as reflected in the first novel. More importantly, his study highlights that “psychological problems cannot be isolated from the influence of wealth and power” (p. 21). Moreover, in the third novel, he endeavored “to illustrate how Saudi Arabia’s participation in the global economic system produces the instability of personality” (p. 34). Finally, in the last novel, he explores the psychological trauma in “the life of a Saudi man who encountered the economic and social development in the 1970s and the 1980s” (p. 119).

Recently, Alwuraafi (2021) published a research paper entitled ‘Modernity and Alienation in Fahd Al-Atiq’s *Life on Hold*’, in which he examines the “negative psychological impacts such as alienation and estrangement on Saudis who, unexpectedly, found themselves in an entirely new world” due to the sudden metamorphosis after the “extraordinary economic boom that resulted from the oil production” (p. 1). Indeed, this major concern of the Saudi novel seems to be the main focus of Mohammed Albalawi’s study, who, however, appears to emphasize this major shift in the Saudi novel. In his article, ‘*The Hidden Treasure: (Re)branding Saudi Fiction*’, he reassures the readers that the Saudi novelists, particularly the young authors, “added a psychological and philosophical depth to the paradigm of Saudi fiction” (Albalawi, 2022, p. 4). He quotes Abdo Khal’s novel *Throwing Sparks* (2010) as an example of Saudi fiction that “can be analyzed psychologically through its topics of narcissism, personality disorder, revenge, torture, and more” (p. 7).

However, even though several studies have been conducted on a few Saudi novels from a psychological perspective, little attention is paid to the specific texts selected for this study. The literature review, in other words, shows that, to date, no psychoanalytical study has been conducted on these texts. This study focuses on two prominent Saudi novelists, al-Humaidan and al-Hamdan. While al-Humaidan’s text was published in 1998, Alhamad’s novel was published in 2002, a relatively recent work, by the time that the social changes had already reached their peak. This enables researchers to provide an in-depth analysis that reflects not only the psychological impact of those changes on society and individuals, but also their effects across generations.

III. THEORETICAL FRAMEWORK

Literature has been studied from a psychological perspective for decades. According to Kurzweil and Phillips (1983), “the coupling of literature and psychoanalysis goes back to Freud” (p. 1). Sigmund Freud, who was an Austrian doctor, founded psychoanalysis at the end of the nineteenth century as a kind of medical treatment for neurotic personality (Holland, 1990, p. 5). Later, he and other theorists of psychology, such as Alfred Adler, Carl Jung, Jacques Lacan, Erich Fromm, Wilhelm Reich, and Melanie Klein, widened the scope of psychoanalysis to include the study of literature, culture, myth, and civilization. The field of literary psychoanalysis was subsequently enriched by literary critics and theorists, including Norman Holland, Lev Tolstoy, Fyodor Dostoevsky, and Virginia Woolf. For Barker (2001), literary psychoanalysis considers the text as “a source of information about the unconscious mind of the speaker” (p. 98). It helps literary critics to explore thematic issues and intended messages by lending itself as a valuable tool that can be used to carry out a systematic analysis of characters’ unconscious thoughts, repressed desires, underlying motives, and inner conflicts.

The primary concern of this study is the psychological turmoil experienced by the characters in al-Humaidan’s *Ghuyum al-Kharif* (1988) and al-Hamad’s *Juruh al-Thakirah* (2002) as a result of socio-economic development. It argues that Muhaisin and Latifah’s psychological condition, in particular, stems from a dual impulse: a desire to adopt Western norms and a simultaneous fear of cultural dislocation. The study employs a psychoanalytic lens to examine the two novels. Drawing primarily on Sigmund Freud’s theories, the analysis focuses on uncovering the unconscious desires, repressed emotions, and internal conflicts of key characters, as well as the symbolic structures within the texts. The study also considers the psychological dimensions of identity, memory, trauma, and cultural perspective, exploring how these elements reflect broader socio-cultural tensions between tradition and modernity. By applying psychoanalytic concepts such as the ‘ego’, the ‘superego’, the uncanny, repression, and others, the paper aims to reveal deeper layers of meaning and the psychological undercurrents that shape both character development and narrative structure.

IV. THE ECONOMIC BOOM: A TURNING POINT LEADING TO A NEW LIFESTYLE

Before we delve into the psychoanalysis of the two novels, it is essential to briefly highlight how these two texts, though written in different times (1988 and 2002), have provided a panoramic view of the rapid social and economic transformations in mid-twentieth-century Saudi society. Al-Humaidan’s *Ghuyum al-Kharif*, for example, depicts these changes, taking Riyadh city as a microcosm for all Saudi cities and societies. In a detailed account of the changing landscape of Riyadh, the narrator protagonist states:

Riyadh, the city, is gradually discarding its past walls, gates, narrow alleys, and ancient mud houses, expanding in all directions with urbanization, factories, universities, and agricultural projects. This leap creates a flourishing economic boost. Prosperity prevails after poverty and destitution ... And now that affluence has spread its wings, let us reflect on the elders’ saying: ‘Oh God, protect us from the evils of this boon’ ... (Al-Humaidan, 1988, pp. 100–101)

This detailed description continues, depicting the rapid and deep social changes. It portrays a society transformed by rapid urbanization, materialism, and the relentless pursuit of success. Luxury and wealth have become dominant values, symbolized by the fixation on the figure of one million, which had then become a common figure. However, as people chase opportunities in the city, personal relationships have weakened, friends drift apart, and even the elderly abandon their rural homes to follow their children into urban life. The countryside lies deserted, echoing with signs of abandonment, while the city is a hub of constant construction and business. Individuals are overwhelmed, time-starved, and so engrossed in commercial ambition that many forget the importance of family and human connection. The overall tone conveys a sense of disorientation and loss amid unchecked progress (Al-Humaidan, 1988, pp. 100–101).

Hence, Al-Humaidan’s (1988) *Ghuyum al-Kharif* reveals a rich tapestry of denotations. First, urbanization is taking place rapidly, bringing about significant changes in the Saudi lifestyle. The Saudi government is carrying out mega-developmental projects. The lower- and middle-class people are rushing towards business; the closed conservative society is turning into capitalism. Social and familial bonds are affected negatively. Everyone is busy building wealth and improving their social status. Second, globalization has a remarkable impact on Saudi society and individuals. The shedding of the walls of the past symbolizes the openness of Saudi society that for centuries remained closed, “fearing the destructive new or the poisoned dazzle” (p. 64). Open-door economic policy resulted in Saudi individuals traveling around the world and discovering new cultures, and people from several Asian and African countries flooding the kingdom as laborers, bringing with them their own cultures. In other words, the kingdom has become a cultural melting pot, leading Saudis to embrace new cultural views and practices like socialism and liberalism, particularly those who belong to the young generation who studied in America and European countries. Apparently, Sulaiman’s character can be an embodiment of such influence in *Ghuyum al-Kharif*, embracing the philosophical views of Western thinkers such as Descartes, Spinoza, and Schopenhauer and writers like Tolstoy, Gorky, and Gogol (p. 48), and considering Muhaisin as a capitalist (p. 52). Sulaiman’s view is further confirmed through Khaled, another character who enthusiastically talks about the need to change the Eastern economic views, social traditions and values, and political systems to catch up with the modern civilized Western countries (pp. 106–111). In short, Al-Humaidan’s *Ghuyum al-Kharif* clearly illustrates to what extent the discovery of oil has changed the fate of the kingdom and its people. Rapid urbanization and pervasive

globalization have led to tremendous social, economic, and intellectual transformations. As Alharthi (2015) believes, oil discovery and globalization are two factors that have accelerated these transformations, which have had a perennial impact on the Saudi personality (p. 14).

Similarly, Al-Hamad's *Juruh al-Thakirah* offers a description of modern Riyadh that closely mirrors the one found in Al-Humaidan's *Ghuyum al-Kharif*. Latifah, the female protagonist, openly points out that Riyadh has changed in a few years to the extent that it has become Riyadhs and that she cannot recognize where Riyadh is in today's Riyadh as it is changing a thousand times a day (p. 25). Urbanization entailed modernization, which is realized in adopting the Western lifestyle. The manifestations of the new lifestyle are evident in various practices that have become emblematic of the boom's newly affluent class: excessive travelling abroad and engagement in medical tourism (p. 22); the acquisition and use of multiple branded cars (p. 26), residence in villas located in well-developed districts within the Kingdom and overseas (p. 28); the ownership of pets such as Persian cats, European dogs, and goldfish (p. 32); the decoration of villas with marble statues and expensive world-famous portraits to signify social prestige (p. 98); the employment of foreign drivers and housemaids to oversee domestic affairs (p. 141); and finally, the consumption of American films, European music, and literary works by Western authors and novelists. In this sense, the new lifestyle appears to be completely different from the old traditional one. There is a huge gap between the old society and the new one. When Latifah compares her life to her sister's, who remained in their village, she finds that "the huge gap between her and her sister makes her feel that they belong to two different eras and two unrelated lives" (p. 275). Thus, both texts are deeply engaged with the dynamics of social transformation and its ensuing consequences. However, the issue at stake is the psychological impact of those social changes on the lives of individuals, which will be discussed in the following sections.

V. THE BOOM GENERATION AND THE COMPLEX OF THE PAST

To begin with, Al-Humaidan's novel deliberately juxtaposes two contrasting portraits of Saudi society, before and after the emergence of the boom generation. That is to say, the boom generation lived in two eras. This generation underwent a profound transformation, transitioning from an era defined by unpaved streets and the absence of basic infrastructure, such as clean water and electricity, to a period of rapid modernization and material prosperity, characterized by modern villas, formal education, hospitals, and widespread access to essential services (p. 25). Muhaisin, the narrator protagonist, for example, is introduced as a miserable villager who moved to Riyadh city and became a government employee, and later an entrepreneur. He traveled to London, Paris, Rome, and Madrid, and "tasted the strange flavor of life" (p. 26). Yet, he is reminded of belonging to a "miserable generation" (p. 34) and of being a "worthless villager" by his friend, Suliaman, who belongs to the next generation (p. 35).

This traumatic state continues to disturb Muhaisin, who is haunted by weird fantasies, feeling that he lives in a dichotomy. He is caught up between the pull of modernity and the traditional lifestyle of the past. He lives a luxurious life; nevertheless, "that does not make him feel true happiness or lush serenity; rather, he feels torn" (p. 45). He used to sleep peacefully when he was at his wretched worst. That is why he asks, "[i]s money the cause of his disorder and distraction" (p. 46). He soon discovers that his psychological suffering is that he is still the 'old peasant', and that his "barren, bleak, past years that he spent in poverty and desolation, sharing his home and food with snakes, still spread their terror around him and absorb ephemeral delight from him" (p. 57). Hence, it is the complex of the past that haunts him and prevents him from enjoying the new era.

From a psychoanalytic perspective, Muhaisin appears to fall under the influence of the 'superego' that acts like a "regulating agent". Based on the Freudian theory, "the superego imposes a set of moral imperatives on the ego to ensure that the ego's actions align with the ethical and societal values" (Zuhair, 2025, p. 4). In other words, the superego is the "moral censoring agency". It is, as Freud says and as discussed by Guerin et al. (1999), the "representative of all moral restrictions" (p. 130). Guerin et al. further state that "Freud de facto attributes the development of the superego to the parental influence that manifests itself in terms of punishment for what society considers to be bad behavior ..." (p. 131). In this sense, we would argue that Muhaisin's "overactive superego creates an unconscious sense of guilt," using Guerin et al.'s expression (p. 131), due to his emersion in the western lifestyle in response to the demands of his id. According to Freud's view, whereas the id is dominated by the pleasure principle and the ego by the reality principle, the superego is dominated by the morality principle. In this sense, al-Humaidan's character seems to embody the psychoanalytic view where Muhaisin's internal conflict between modernism and tradition appears to be the result of a struggle between the id (instinctual impulses) and the superego (internalized societal norms), with modernism representing the id's desire for freedom and tradition embodying the superego's demands for conformity and guilt.

Muhaisin's psychological state is further illustrated through the theme of alienation, another psychological dimension explored in *Ghuyum al-Kharif*. Upon returning from America, Muhaisin experiences a profound sense of estrangement within his native environment. He finds himself disconnected from the familiar, yearning for the vitality and dynamic atmosphere he once encountered abroad, thus embodying the psychological dislocation experienced by individuals caught between contrasting cultural spheres. Indeed, Muhaisin's situation appears to echo that of Subhyyah in *San'a'ā'ī* [My Sana'a] by Nadia al-Kowkabani. Upon returning from Cairo, Subhyyah finds herself utterly alienated from both the people and the city that she once viewed with deep nostalgia. "Ironically, Subhyyah ends up searching for Cairo" as "she "finds Sana'a incomparable to Cairo" (Alkodimi, 2021, p. 13). Like Subhyyah, whose return from Cairo to Sana'a evokes a deep sense of displacement, Muhaisin's sense of alienation similarly underscores the psychological distance that he feels in his

own environment upon returning. Muhaisin's psychological state is revealed through self-interrogation as he raises serious questions. "Why did they push us to the West until we fell in love with it? Isn't it our right to imitate it since it has unleashed this burning sense of awakening life and freedom? We tasted privation ... Now the other side of life smiled and clapped for us, calling us to pursue our pleasure" (p. 76). The very mention of 'pleasure' clearly illustrates Muhaisin's psychological conflict.

From a psychoanalytic perspective, conflict between the superego and the id, or the ego, can lead to "neurosis", a psychological distress, anxiety, or inner turmoil (Ryan, 1999, p. 36). This inner turmoil can be interpreted in Freud's (1915) conception as "the return of the repressed" (p. 154). Muhaisin appears to suffer from some repressed desires or aspects of his personality that were fulfilled in the Western lifestyle, which led to feelings of nostalgia and an inner conflict. That is to say, the character's experience of alienation could stem from the conflict between his Saudi cultural identity and the Western values he has internalized. Hence, Muhaisin's experience of alienation in his own culture could be seen as an uncanny feeling, where the familiar becomes strange and uncomfortable.

Muhaisin's emotional instability reaches its peak when he regretfully admits that by staying abroad, he is running away from his conservative society to the world of perversity (p. 82). He enjoys worldly pleasures in the West that he cannot find at home. He wonders whether an ethical crisis will come up as a consequence of this modern Western capitalist lifestyle. He realizes that there is a huge gap and a deep chasm caused by hidden transformations. Consequently, he resolves to reclaim his youth, to return to the foundational layers of his past, and to extract from them that which he seeks (p. 99). Perhaps, this is why his friend Sulaiman rightly accuses him of suffering from schizophrenia and that he has come to Europe with the complexes of Eastern society (p. 103). Sulaiman's assertions seem substantiated, given that Muhaisin experiences a state of mental fragmentation, entangled in a psychological conflict. To put it differently, Muhaisin's inner trauma is a consequence of an inner conflict between what Horney (1950) calls the "real self" (i.e., the person's true personality) and the "ideal self" (the societally expected personality a person strives to maintain), stressing that a normal psychological state of mind can be achieved by balancing real and ideal selves (p. 176), which Muhaisin fails to achieve.

Like Muhaisin, Latifah in *Juruh al-Thakirah* by Turki al-Hamad, has a severely psychologically disturbing issue as she suffers from Nostophobia and Chronophobia. The specters of the past, as evoked by the novel's title, function as a metaphor for the protagonist's enduring psychological trauma. She was born in the last year of World War II and is now over fifty years old (p. 18). Chronologically, this description spans the period of the 1990s, following the Gulf War and the liberation of Kuwait (p. 22). During the boom years, her family had risen from poverty and become one of the richest families in Riyadh. However, "a feeling of fear from the future creeps into her heart; she is worried about the return of poverty days, though everything tells that those days had gone forever for their accounts in the European and American banks are enough to secure their welfare for an infinite time" (p. 23). As Horney (1939), in her book *New Ways in Psychoanalysis*, states, human beings are not only controlled "by the pleasure principle alone but by two guiding principles: safety and satisfaction" (p. 73). This might explain Latifah's neurotic fear of losing wealth and social status.

From a Freudian psychoanalytic point of view, the character's fear of a seemingly impossible return to poverty, despite objective financial security, reveals the persistence of unconscious anxiety rooted in earlier traumatic deprivation. This anxiety, manifesting as an irrational fear of the future, exemplifies Freud's notion of the "return of the repressed," whereby unresolved past experiences resurface in disguised or displaced forms. Her emotional response illustrates not a rational appraisal of circumstances, but rather a symptom of internal psychic conflict: the ego, unable to fully repress the trauma of past poverty, allows it to re-emerge as anticipatory fear. Hence, Latifa's deep fear of returning to a life of poverty, after having lived through the comfort and possibilities of the modern era, can be understood as a psychological struggle rooted in repressed memories and anxieties. Although she may not fully acknowledge these fears on a conscious level, they continue to influence her behavior and thinking. According to Freud (1915), past experiences, even when suppressed, remain stored in the unconscious and tend to resurface over time (p. 154). In Latifa's case, the trauma of her earlier life does not vanish but instead reemerges in subtle, distorted forms, through anxiety, resistance to change, or symbolic behavior. This aligns with Freud's (1915) notion that symptoms and inner conflicts are not caused directly by repression, but rather represent the return of what has been repressed (p. 154). In this sense, Latifa's case exemplifies the Freudian concept of the 'return of the repressed'. This psychological trauma has been clearly articulated through her psychiatrist, Dr. Saleem, who explains to her:

I noticed that you maniacally fear the future and you have a fear of the past as well ... you fear the past and its poverty and destitution. You do not believe that you live in a wealth and social status that you never dreamed of; therefore, you feel anxious. The whole education that you got in your young age concentrated on Obliteration being the rule, so never trust days ... You try to suppress this thought, which as a result transforms into a complex that is the cause of your turmoil. (Al-Hamad, 2002, pp. 236–237)

Thus, from a psychoanalytic perspective, Saleem's comments clearly illustrate the inner conflict between Latifa's unconscious fears and her conscious reality. The speaker identifies a dual fear: of both the past (poverty, insecurity) and the future (the loss of newly gained wealth and status). This emotional turmoil reflects further what Freud describes as the 'return of the repressed', a psychological process where repressed thoughts or emotions, especially those rooted in trauma or fear, reemerge in disguised or symptomatic forms. The text also subtly refers to the impact of childhood experiences, a central tenet of psychoanalysis. The line 'the whole education that you got in your young age concentrated on Obliteration being the rule, so never trust days' suggests that Latifa internalized instability and impermanence early

on. These deeply embedded beliefs formed a kind of psychic blueprint, instilling in her a chronic sense of mistrust and vulnerability that continues to shape her adult psyche. Latifah's attempts to suppress these fears, of losing everything, of being returned to a destitute state, are not successful. Instead, the repression leads to the formation of a psychological complex, which manifests as anxiety and inner conflict. In this case, the complex born from repressed trauma becomes the source of her turmoil. Hence, Latifa's psychological distress is not just about her current life situation, but about the unresolved, unconscious fears rooted in past deprivation, which continue to haunt her despite her material success. Her inability to fully accept her present comforts speaks to a deeper, internalized belief that security is an illusion, a belief shaped by early experiences and reinforced by repression. This chronophobia, which is usually associated with people undergoing major life changes, leads her to an abyss of madness. Additionally, her thinking is occupied by nostophobia, the fear of her personal history or origins.

Arguably, Latifa's psychological conflict stems from a dual impulse: a desire to adopt Western norms and a simultaneous fear of cultural dislocation. Like Muhaisin, Latifah's 'superego' seems to act "like an internal censor, causing [her] to make moral judgments in light of social pressures," according to Freudian theory. As Alhusami (2021) puts it, Saudi women are tormented by "an inner conflict between openness to Western culture and conformity to cultural heritage" (p. 1). Bressler rightly observes that the superego, de facto, operates according to morality principles and acts as a guard to protect society and us from the id. It serves as a "filtering gent, suppressing the desires and instincts forbidden by society, thrusting them back into the unconscious" (p. 123). Overall, according to psychoanalysis, the superego "manifests itself through punishment" by creating an "unconscious sense of guilt and fear" (Bressler, 2003, p. 123). This perhaps explains the many conflicting thoughts swirling through Latifa's mind (Al-Hamad, 2002, p. 14).

Indeed, the very mention of the names of psychologists Freud, Jung, Adler, Watson, Pavlov, and Skinner by Latifah can be a significant reference to her psychological dilemma (pp. 93–94). Unluckily, many views of such writers contradict her religious and cultural beliefs. However, despite her immersion in the Western lifestyle, she believes that "the West's laws, problems, and diseases do not apply to us, the Arabs, as we have our own specificities that cannot go with others' generalizations" (p. 101). She emphatically states: "I am the daughter of a decent family; I am Arab; I am Muslim; and I am Eastern" (p. 107). Unfortunately, such cultural conflict causes her psychological conditions to deteriorate. While discussing her mental illness, her son Khalid accuses his father of being the cause of her suffering. He addresses his father: "My mother is a pious woman and your lifestyle ... hurts every certainty she holds ... She does not want to inflame you as she is a good wife, and that reflected upon her in the form of physical and psychological illness" (pp. 123–125). Hence, her son's comments appear to encapsulate not only Latifah's condition but also the central theme of the text, namely, the entanglement between modernity and tradition.

VI. PLACE CAPTIVITY AND TIME IMPRISONMENT

Arguably, the psychological turmoil of both protagonists in *Ghuyum al-Kharif* and *Juruh al-Thakirah* stems not merely from external circumstances but from a deep-seated psychological inertia, a resistance to internal transformation that persists despite changes in their material and social environments. That is to say, the protagonists' adoption of modern lifestyles fails to liberate them from the grip of their past. Drawing on Freud's concept of 'repetition compulsion', their psychological inertia reflects a deeper inability to break free from earlier emotional structures. In this sense, they continue to relive the past, not just in memory, but also through unconscious repetition, despite material and social development (Freud, 1920). Their transition from mud houses to palaces failed to transform their inner nature. Despite adopting a modern lifestyle, they remain psychologically anchored in the past. Muhaisin, for instance, explicitly acknowledges this fact in a heated discussion on family ties in the East and the West with his young friend Khalid when he confirms, "never forget that deep down inside me lies the old peasant" (Al-Humaidan, 1988, p. 131).

By the same token, Latifah, in *Juruh al-Thakirah* by Al-Hamad, seems to experience the same psychological condition. "Outwardly, she had turned into something resembling an Italian countess or a lady born into an English aristocratic family and educated in the finest institutes of Paris, but inwardly she remained full of everything instinctive and simple" (p. 67). In other words, the old Latifah still inhibits the modern Latifah. The discrepancy between the outward and the inward of the protagonists' personas is due to being ensnared by place and imprisoned by time. This is exactly what Latifah felt during a serious discussion with her Lebanese nurse, Haifa, about the relationship between men and women. "Latifah seemed disturbed by this discussion, as it was shaking the convictions she had lived with throughout her life, and issues that were unthinkable, or even permissible to approach" (p. 227). Haifa's comments pulled Latifah back to the captivity of place and the prison of time, when she concluded that "we are captives of habit and tradition" (p. 228). Hence, like Muhaisin, Latifah appears to pass through the same experience as she clearly admits: "Yes, we no longer live in the village, and even the whole village no longer exists, but it does not want to leave us. The worst of the village still inhabits our depths and controls our behaviors despite everything that has changed and is changing" (p. 82). Consequently, one can conclude that the oil boom generation's psychological suffering was because of their split souls that experienced schizophrenia caused by the old firm village beliefs and the modern lifestyle they practiced. They remained chained by space and confined by time. According to Al Farhan and Al Raddadi (2023), the "desire for modernization and progress has not drastically changed the cultural structure or locale per se; rather, it has reshaped the society's relationship to its heritage and environment" (p. 2).

Indeed, the twentieth century is distinguished as an era of cultural communication and economic exchange, an unprecedented moment in history. This is a fact that is recognized by the characters of *Ghuyum al-Kharif*, who belong to both the boom's generation and the next generation (Al-Humaidan, 1988, p. 106). The question, thus, becomes, could the second generation escape the psychological dilemma the first generation experienced? The new generation, de facto, was familiar with the modern kingdom and did not have to contend with the dichotomy between old and new lifestyles. Nevertheless, it seems that mentality has remained unchanged, as believed by many characters in both novels. In an argument between the two young characters, Salman and Khalid, in *Ghuyum al-Kharif* about the impact of the twentieth century on the world in general and Saudi Arabia in particular, the latter surprisingly admits that, regardless of the twentieth century's positive features mentioned above, the socio-economic view will remain different and unchanged. Unlike his friend, who thinks that holding fast to traditional views will decline with time, Khalid believes that change might take tens of years (pp. 106–107). Khalid himself is a clear illustration of the case in point. When he declares that he is travelling to see his sick father, his American friend tells him that it is enough to call him, to which he replies: "It is not enough, dear. Our Eastern characteristics are different ... We cannot and do not want to change our social bonds. You need a long time to study our characteristics" (pp. 129–30). Thus, Khalid's comments clearly illustrate the deep attachment of Saudi individuals to their culture and traditions, a bond that underlies their psychological struggle, as they find themselves unable to fully embrace a newly adopted Western lifestyle.

This attitude has been further confirmed by Tariq, Latifah's son in *Juruh al-Thakirah*, who reminds his mother of his father's mentality when he reacted violently to the idea of her living in Beirut alone. Latifah comments on this incident and says that "generations change and the conditions as well, but minds do not want to change" (Al-Hamad, 2002, p. 278). She goes on, telling us that Tariq is a university graduate who is supposed to be among the intellectual elite, and a businessman who is assumed to be one of the new bourgeoisie; nevertheless, he is a replica of his father, whom the village haunted wherever he was. Hence, she seems to sum up the condition of all when she concludes that "the village seems to have disappeared from space and time, only to settle permanently in minds" (p. 279). The spatial complex appears to exhibit a remarkable persistence. While the outward appearance of the place and its people has changed, inwardly they have remained unchanged through generations. The lifestyle is modern, but the social traditional views and practices have remained firmly rooted. The psychological dilemma is thus transgenerational and might continue for a few decades.

VII. CONCLUSION

This paper used a psychoanalytical approach to explore al-Humaidan's *Ghuyum al-Kharif* (1988) and Turki al-Hamad's *Juruh al-Thakirah* (2002), focusing on the psychological experiences of the characters as they navigate the tension between inherited traditions and the emerging values and liberties. By focusing on the psychological dimensions of social change, this study offers insight into the lived experience of change, its ambiguities, contradictions, and emotional entanglements. Through Muhaisin, Latifah, and other characters, both al-Humaidan and al-Hamad tried to depict how the boom generation internalizes, negotiates, and sometimes resists the rapidly evolving societal norms around them. The study reveals that these texts are deeply engaged in the psychological conflict of the characters in the novel as a consequence of the rapid social transformation. In this sense, they serve as vital interlocutors in the broader discourse on modernity and mental life in the contemporary Arab world.

Both al-Humaidan and al-Hamad appear to emphasize that Saudi men and women are deeply attached to their culture and traditions, an attachment so deeply rooted that it shapes their identities and internal landscapes. This cultural embeddedness gives rise to a psychological conflict, particularly when individuals are confronted with competing modern values and/or external influences. In other words, the works of both authors suggest that the psychological trauma experienced by Saudi men and women stems from a deeply ingrained attachment to cultural and traditional norms.

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A Systematic Literature Review on China's Image in News Discourse Studies

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Abstract—To better understand how China's image is represented in global news discourse, this study systematically reviews and examines existing studies on the topic. Following the PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) guidelines, this study employed Web of Science (WoS) and Scopus to retrieve relevant articles published between 2015 and 2024. Through content analysis, this study identified six themes reflecting China's media image: (1) economic development and international relations, (2) health and crisis management, (3) social and political issues (4) integrated media representation, (5) environmental issues, (6) culture and education. After analysis, the SLR revealed that research on China's image from 2015 to 2024 was generally on the rise, particularly after the COVID-19 pandemic. However, most of the studies focused on Western media, making non-Western media relatively underexplored. China's image in Western media tended to be negative. While China's image in the non-Western world was generally presented in a positive light, negative portrayals also existed, resulting in a more nuanced picture. Methodologically, there was a growing trend towards employing mixed methods, particularly the combination of corpus linguistics and Critical Discourse Analysis (CDA). The findings of this study provide a clearer understanding of the discursive construction of China's image in global news discourse from 2015 to 2024 and highlight important directions for future research, including greater engagement with non-Western media, visual content, and interdisciplinary analytical frameworks.

Index Terms—systematic review, PRISMA, China's image, news media, discourse analysis

I. INTRODUCTION

National image is a comprehensive and multifaceted construct that encompasses both a nation's self-perception and how it is perceived by external actors within the international system (Boulding, 1956). Its construction is shaped to a large extent by mainstream media outlets, including news agencies, print media, cultural programs, sports events, and literary works (Kunczik, 2016). Despite advances in globalization and communication technologies, many people still have limited direct experience of traveling abroad. Consequently, media remain one of the principal ways through which people form perceptions of other countries (McNelly & Izcaray, 1986). As Fairclough (2001) pointed out, the mass media play a pivotal role in creating and maintaining power relations, as dominant ideologies are reproduced and legitimized through discursive practices. The formation, dissemination, and maintenance of national image are thus inseparable from language. Through discourse, language not only serves as a tool for constructing and reproducing national identities but also, through specific linguistic choices, exerts a profound influence on how countries are represented and perceived in the global arena (Wodak, 2015; van Dijk, 2018).

Since the end of the Cold War, governments have increasingly recognized the strategic importance of constructing national image in the context of global cooperation and competition (Li & Chitty, 2009). As an intangible asset and a vital element of soft power, national image has emerged as a crucial tool for countries to shape and enhance their global status in what has been described as an era of "image hegemony" (Meng, 2020, p. 10). Soft power refers to a nation's capacity to achieve its desired outcomes by appealing to others rather than using force or financial incentives (Nye, 2004). As a central component of soft power, national image has become the focal point of international attention (Meng, 2020). Moreover, a nation's image can be either strengthened or undermined through its representation in global media. A positive image can increase tourism and investment, while a negative one may reinforce stereotypes and strain international relations (Almakaty, 2025). These dynamics are particularly relevant in the case of China.

After becoming the world's second-largest economy in 2010, China has consistently been a key driver in global economic growth. Recognizing the importance of international reputation alongside economic influence, the Chinese government has adopted multifaceted strategies to enhance its image abroad. These strategies include cultural

diplomacy—for instance, the establishment of Confucius Institutes (d’Hooghe, 2015; Repnikova, 2022); media outreach through platforms like CGTN and social media (Zhao, 2015; Song et al., 2023); and regional economic programs like the Belt and Road Initiative (BRI), launched in 2013 to boost infrastructure, trade, and regional connectivity across Asia, Europe, and Africa (Huang, 2016; Yu, 2018; Khanal & Zhang, 2024). However, despite these efforts to project a positive national image, international media coverage continues to depict China through negative frames, such as China threat theory, expansionism in the South China Sea, and human rights abuses (Huan, 2023; Ooi & D’arcangelis, 2017; Boykoff, 2024). Today, Western media continue to dominate the global media landscape. As China has yet to establish itself as a genuine media power, Western narratives maintain a “hegemonic discourse” (Meng, 2020, p. 14).

Since 2015, there has been a noticeable rise in scholarly interest in the representation of China in international media discourse, particularly in the domain of news reporting. Two recent reviews have highlighted this trend (Wang & Sun, 2023; Ali et al., 2021). Deploying a bibliometric analysis approach, Wang and Sun (2023) mapped out macro-level trends in Chinese discourse studies between 1994 and 2021. While valuable for visualizing research productivity, thematic focus, and citation patterns, this approach has notable limitations. Their data was limited to 18 journals in the WoS core collection, potentially excluding relevant studies from other important databases such as Scopus or IEEE Xplore. Moreover, the bibliometric method is largely quantitative and descriptive, making it unable to capture discourse content or contextual dynamics shaping representations of China in global news discourse. Similarly, Ali et al. (2021) conducted a qualitative narrative review of studies on China’s image in global media, highlighting growing media attention and scholarly focus across both Western and non-Western contexts. Their findings provide important insights into the overall representation of China’s image in Western and non-Western media. However, this study lacks methodological transparency and does not follow a systematic protocol for literature retrieval and analysis, making it difficult to assess the consistency or replicability of the findings.

In contrast to these previous reviews, the present study adopts a systematic literature review (SLR) based on the PRISMA 2020 (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) framework (Page et al., 2021). This method allows for a transparent, replicable, and rigorous process of identifying, screening, and synthesizing peer-reviewed empirical studies (Moher et al., 2009; Page et al., 2021; Siddaway et al., 2019). Therefore, using explicit inclusion and exclusion criteria, this study aims to conduct a systematic literature review on discursive representation of China’s image in global news discourse. To achieve this aim, three research objectives were highlighted:

- (1) to identify the current status of China’s image representation in global news discourse from 2015 to 2024;
- (2) to analyze the overall portrayal of China’s image in global news discourse from 2015 to 2024;
- (3) to explore the possible factors that may account for variations in China’s media image across different geopolitical settings.

II. METHODOLOGY

A. PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses)

This systematic review study was conducted in accordance with the guidelines and the reporting checklist outlined in the PRISMA 2020 statement. PRISMA is a standardized and transparent protocol for identifying, screening, and selecting relevant studies. Originally developed by Moher et al. (2009) and updated by Page et al. (2021), PRISMA ensures methodological rigor through the use of a flow diagram and a 27-item checklist to help document each stage of the review process. Stressing reproducibility, transparency, and reliability, this method has been widely applied across various disciplines (Abas et al., 2022; Pahlevan-Sharif et al., 2019; Cong-Lem et al., 2024).

B. Formulation of Research Questions

To ensure methodological rigor, research questions in the present study were formulated according to the PICO framework. It provides structured guidance for researchers to formulate appropriate research questions for systematic reviews (Cañón & Buitrago-Gómez, 2018; Abas et al., 2022). Originally developed in evidence-based medicine, PICO stands for Population/Problem, Intervention, Comparison, and Outcome. In recent years, however, scholars in social sciences have increasingly adapted the PICO model for use in systematic reviews beyond medical domains, particularly in environmental and linguistic studies (Abas et al., 2022; Abas, 2023; Song et al., 2025). In its adapted form for the social sciences, the PICO framework encompasses three essential elements: Population or Problem, Interest and Context (Abas et al., 2022). For the present study, these elements were operationalized as follows: China’s image representation (population), news discourse (interest), and discourse analysis (context). Therefore, this systematic review examines the following questions:

- (1) What is the current status of academic research on China’s image representation in global news discourse from 2015 to 2024?
- (2) What is the overall portrayal of China’s image in global news discourse from 2015 to 2024?
- (3) What are the underlying factors that may account for the variations in China’s image represented in global news discourse from 2015 to 2024?

C. Systematic Searching Strategies

The systematic review followed a three-stage process as illustrated in Figure 1: identification, screening and eligibility assessment.

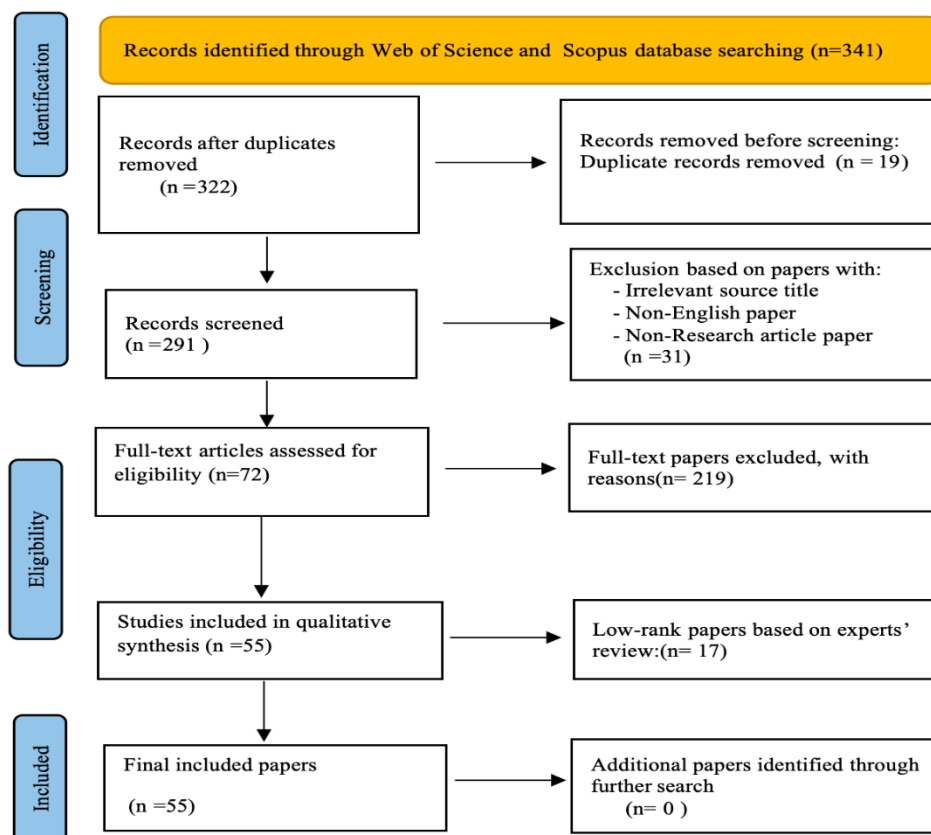


Figure 1. A Flow Diagram of the Process

(a). Identification

Identification phase in a systematic literature review is the initial stage for searching and collecting potentially relevant studies using the keywords derived from the research questions. In this study, following Okoli's (2015) approach, three keywords were generated based on the research questions. The keywords were: "China's image", "news media", and "discourse analysis". To identify potential articles, the three keywords and their synonyms were combined into a series of search strings applied to two databases: WoS and Scopus. These two databases were chosen because their rigorous editorial process guaranteed the quality of articles and helped sustain the journals' impact factor rankings (Abas et al., 2022). A total of 341 relevant articles were identified across both databases.

TABLE I
THE SEARCH STRINGS

Database	Search Strings
Web of Science	Advanced Search
	TS=(China's image or the image of China or representation of China or framing of China) AND TS=(news coverage or news report or news media or media report) AND TS=(language study OR discourse analysis OR discourse study OR linguistic study OR linguistic analysis) Time: publication years from 2015 to 2024 Language: English
Scopus	TITLE-ABS-KEY ("China's image" OR "the image of China" OR "representation of China" OR "framing of China") AND ("news coverage" OR "news report" OR "news media" OR "media report") AND ("language study" OR "discourse analysis" OR "discourse study" OR "linguistic study" OR "linguistic analysis") Time: publication years from 2015 to 2024 Language: English

(b). Screening

First, 19 duplicates were removed from the initial 341 articles. Second, the remaining 322 articles were screened to exclude books, book chapters, conference proceedings, review papers, and meeting abstracts. Only journal articles published in English were retained to ensure clarity and avoid misinterpretation. During this screening process, 31 articles were removed for not meeting the inclusion criteria, leaving 291 articles for the eligibility stage.

(c). Eligibility

In this process, the remaining 291 articles were manually reviewed by screening the title and abstract of each article to ensure the quality of the review. A total of 219 articles were removed for the following reasons: (1) they focused on China's self-image as represented by Chinese media rather than international ones; (2) although the expression "China's image" appeared in the abstract, it was only mentioned in passing. During this stage, we encountered some articles that remained ambiguous in terms of eligibility. For such cases, we read the full text again to determine whether they should be included in the final review. Following this process, a total of 72 articles remained for inclusion.

D. Quality Appraisal

To ensure the quality of the review, two reviewers participated in the appraisal process. Both reviewers have over 15 years of experience in English language studies. The quality of the articles was assessed based on the abstract, research objectives, and research methodology (Mohamed Shaffril et al., 2021). Following Abas et al. (2022) and the methodology proposed by Petticrew and Roberts (2006), the remaining articles were categorized into three levels: high, moderate, and low. This study included only articles ranked as high and moderate levels. During the appraisal process, inclusion required consensus between both experts that an article met at least a moderate level. In cases of disagreement regarding an article's inclusion, the reviewers discussed until consensus was reached and a final decision was made. After this stage, 36 articles were rated as high, 19 as moderate, and 17 articles as low. Consequently, 55 articles remained for the review.

E. Data Abstraction and Analysis

In this study, thematic analysis was employed to identify the dominant themes and the trends in research on China's image representation in global news discourse. Thematic analysis is an analytical approach to uncover, investigate, and describe recurring patterns (themes) within research data (Braun & Clarke, 2006). This approach has been effectively utilized in prior systematic literature studies (e.g., Arifin et al., 2023; Abas, 2021; Abas, 2023). To enhance transparency and replicability, the thematic coding process adhered to Braun and Clarke's (2006) six-phase approach. As a result of this process, the following six themes were identified: 1) economic development and international relations, 2) health and crisis management, 3) social and political issues, 4) integrated media representation, 5) environmental issues, and 6) culture and education.

III. RESULTS

A. Spatial and Temporal Analysis of Selected Articles

Following a rigorous selection process, 55 journal articles were ultimately included for detailed analysis in this study. When a single study analyzed news media from multiple countries or regions (such as the United States, the United Kingdom, and Japan), each country mentioned was counted separately in the geographical distribution. For example, if an article examined newspapers from both the U.S. and the UK, it was counted once under North America and once under Europe. As a result, the total number of media affiliations exceeded the total number of reviewed articles. As demonstrated in Figure 2a, the yearly distribution of journal articles spanned from 2015 to Dec. 2024 (the search date of this review). The number of studies remained relatively low and fluctuated between two and six articles per year from 2015 to 2019. Notably, no relevant studies were identified in 2020. However, a significant increase was observed from 2021 onwards, with a peak in 2024 (12 articles).

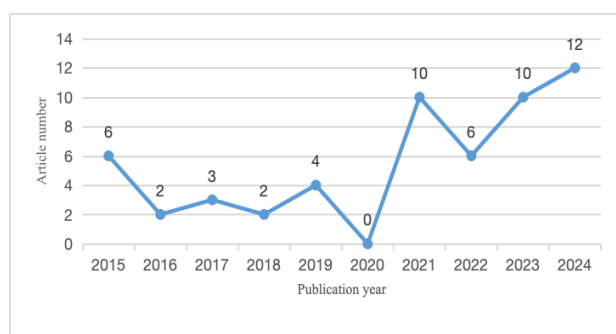


Figure 2a. Temporal Distribution of Selected Articles

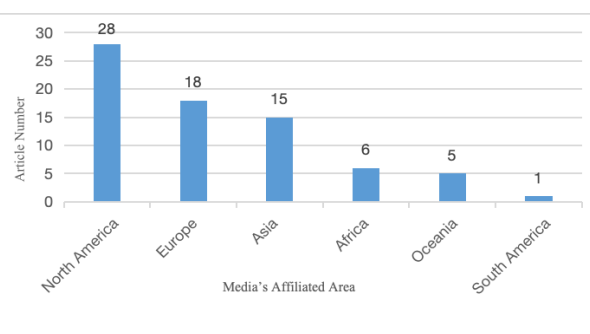


Figure 2b. Distribution of Media's Affiliated Areas

The distribution of media outlets, as shown in Figure 2b, revealed a pronounced imbalance in the global representation of China's image. Western media accounted for the majority of sources, including North America (28 articles), Europe (18) and Oceania (5). In contrast, non-Western media were significantly underrepresented with Asia contributing 15 articles, followed by Africa (6) and South America (1).

B. Research Theory

As presented in Table 2, CDA-based theories (e.g., Fairclough's three-dimensional model, Wodak's discourse historical approach, or van Dijk's socio-cognitive approach) were the most widely used theoretical frameworks, appearing

in 21 articles, accounting for 38.18% of the total. Framing theory was the second most frequently employed with 16 studies (29.1%). Meanwhile, a small number of studies employed conceptual metaphor theory (3 articles) and appraisal theory (2 articles). In addition, integrative frameworks were used in two articles that combined multiple theories such as CDA with framing theory or Systemic Functional Linguistics. Furthermore, 11 of the reviewed studies were classified as others. Among these, either no explicit theoretical framework was adopted or interdisciplinary theories were employed, drawing from fields such as political science, international relations, or communication studies.

TABLE 2
DISTRIBUTION OF RESEARCH THEORY

Research theory	References	Number
CDA-based theories	Zhang (2022); Liu et al. (2024); Yang and Wang (2023); Wang et al. (2023); Song et al. (2021); Du (2021); Yang (2015); Xia et al. (2024); Huan (2024); Miao et al. (2023); Lü and Zhang (2023); Afzaal et al. (2019), etc.	21
Framing theory	Sun and Cheung (2022); Yi et al. (2024); Nguyen et al. (2024); Boykoff (2024); Chung et al. (2021); Ittefaq et al. (2023); Jia and Lu (2021); Xu and Cao (2019), etc.	16
Conceptual metaphor theory	Xin and Matheson (2018); Tang (2017); Shi et al. (2024)	3
Appraisal theory	Li and Yang (2018); Wang and Adamson (2015)	2
Integrative framework	Zhang (2022); Tang (2021)	2
Others	Panao (2024); Xin and Matheson (2015); Hou (2021); Hou (2023); Qi and Hu (2024), etc.	11

C. Research Approaches

Table 3 presents the research approaches utilized in studies on China's image in global news discourse over the past decade. The findings indicate that corpus-based CDA approaches have emerged as the dominant methodological choice in this field. Specifically, among the 55 studies reviewed, the most frequently employed method was a combination of corpus and critical discourse analysis, appearing in 21 articles and accounting for 38.18% of the total (e.g., Yang, 2015; Du, 2021; Hou, 2021; Liu et al., 2024; Shi et al., 2024). Content analysis was the second most common approach, adopted in 14 articles (25.45%) (e.g., Ittefaq et al., 2023; Ng, 2022; Boykoff, 2024). This was followed by corpus-based discourse analysis, employed in 6 articles (10.9%) (e.g., Xin & Matheson, 2015; Hou, 2023), and a mixed-method approach combining content analysis and discourse analysis, used in 5 articles (9.1%) (e.g., Teo & Xu, 2023; Lams, 2016). Discourse analysis accounted for 7.27%, appearing in 4 articles (e.g., Wang & Adamson, 2015; Jia & Lu, 2021), while sentiment analysis and multimodal discourse analysis were less commonly employed, accounting for 5.45% and 3.64% respectively.

TABLE 3
DISTRIBUTION OF RESEARCH METHOD

Research approaches	Number	Percentage
Corpus-based critical discourse analysis	21	38.18%
Content analysis	14	25.45%
Corpus-based discourse analysis	6	10.9%
Content analysis and discourse analysis	5	9.1%
Discourse analysis	4	7.27%
Sentiment analysis	3	5.45%
Multimodal discourse analysis	2	3.64%

D. Thematic Analysis

(a). Overview of Identified Themes

As demonstrated in Figure 3, a total of six themes of China's image representation in global news discourse were identified: 1) economic development and international relations, 2) health and crisis management, 3) social and political issues, 4) integrated media representation, 5) environmental issues, 6) culture and education.

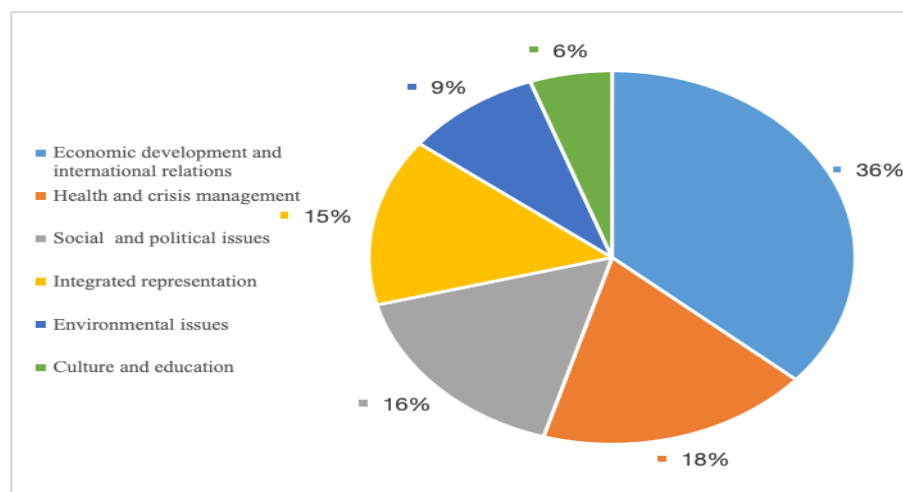


Figure 3. China's Image Representation in Global News Discourse

To be specific, the theme of economic development and international relations dominated the discourse, accounting for 36% of the reviewed studies. It included three sub-themes: China's economic rise (e.g., Tang, 2017; Song et al., 2021; Golan & Lukito, 2015), economic diplomacy (e.g., the Belt and Road Initiative), and bilateral economic relations (e.g., US-China trade war, state visits) (Ng, 2022; Fong & Chia, 2017; Afzaal et al., 2019). While these issues intersect with international relations, the media discourse predominantly emphasized China's economic growth and global economic influence; thus, they are grouped under the economic theme. The second most prominent category was health and crisis management (18%), which encompassed China's media representation during the COVID-19 pandemic. Social and political issues occupied 16% of the studies, covering themes such as the portrayal of Beijing's political centrality, the Chinese Dream and stability narratives, coverage of the National People's Congress, as well as symbolic mega-events such as the 2022 Winter Olympics. Meanwhile, integrated representations (15%) encompassed studies in which China was framed through a combination of overlapping lenses, such as economy intertwined with politics or diplomacy and ideology. Environmental issues (9%) and culture and education (6%) appeared less frequently, suggesting that ecological and soft power dimensions of China's global image remained relatively underexplored.

(b). Media Representations of China Within Each Theme

1. Economic Development and International Relations

Global media portrayals of China's economic rise diverge sharply along ideological and geopolitical lines. In Western media outlets, China is often portrayed as a threat to Western dominance, with *The Wall Street Journal* framing it as a direct challenger to U.S. hegemony (Golan & Lukito, 2015) and British economic media employing bestial and militaristic metaphors to emphasize its rising power as a threat to the Western world (Tang, 2017). However, some UK coverage emphasized China's pragmatic opportunities for British industries (Song et al., 2021). By contrast, Asian media, particularly in Malaysia, framed China's economic growth in cooperative terms, highlighting mutual economic benefits (Fong & Chia, 2017; Ng, 2022), whereas Indian media maintained an adversarial stance, framing China as a strategic rival in economic and geopolitical terms (Chowdhury, 2015).

Coverage of the Belt and Road Initiative (BRI) followed similar patterns. Western media often framed the BRI through the lens of suspicion: *The New York Times* used negative framing in 41% of its BRI-related headlines (Teo & Xu, 2023), whereas the BBC acknowledged the potential benefits of the BRI but emphasized its economic and environmental risks (Apirakvanalee & Zhai, 2022). In contrast, non-Western media—especially in Pakistan—framed the BRI positively as transformative, portraying China as a trusted and benevolent partner (Ittefaq et al., 2023).

Beyond the general portrayals of China's economic rise and global initiatives, media discourse in Asia often reflected country-specific bilateral relations. These portrayals often fell into a binary framing of "partner versus threat," shaped by national interests and geopolitical tensions. In ASEAN countries such as Malaysia, China was largely portrayed as an economic partner during high-level visits, though sovereignty concerns occasionally emerged (Ng, 2022; Fong & Chia, 2017). In contrast, Indian media framed China predominantly as a regional aggressor (Chowdhury, 2015).

2. Health and Crisis Management

Health and crisis management emerged as the second discursive theme, especially in relation to China's response to COVID-19 and vaccine diplomacy. In Western media, particularly in the United States and Australia, China was predominantly framed in negative terms, with discursive strategies such as blame attribution, stigmatization, and delegitimization to portray China as opaque and politically driven. These portrayals shifted over time—from initially blaming China for the outbreak to later criticizing its lockdown measures and global vaccine outreach (Liu et al., 2024; Liu & Baker, 2024).

In contrast, non-Western media presented China's role in the COVID-19 issue from more diverse perspectives. Russia's *RIA Novosti* depicted China's efforts positively, emphasizing its transparency and efficiency (Lü & Zhang, 2023). However, African media offered a more divided picture: while Kenyan outlets criticized China over debt issues and incidents of discrimination against Africans in Guangzhou, Ethiopian coverage framed China as a cooperative partner, shaped by state-aligned narratives and the norms of developmental journalism (Li, 2021).

3. Social and Political Issues

Beyond health-related narratives, social and political issues accounted for 16% of the studies. Western media often portrayed China negatively through representations of core political concepts such as the "Chinese Dream" and stability, major cities like Beijing, and symbolic events such as the Olympics. These political concepts, which were central to China's domestic discourse, were reframed in global media with contrasting ideologies. For instance, stability was frequently associated with authoritarian rule, suppression of dissent, and state repression in *The New York Times* (Wang et al., 2023) particularly in the context of the Hong Kong protests and human rights issues. Similarly, the Chinese Dream was linked to authoritarian ambition and ideological opposition to Western values (Zhang, 2022). Beijing was also depicted unfavorably in European media (e.g., *The Times*, *Le Figaro*, and *Der Spiegel*, focusing on surveillance, pollution, and political rigidity (Xu & Cao, 2019). Coverage of the 2008 and 2022 Beijing Olympics in the U.K. and U.S. further reinforced this image. British outlets emphasized political conflict and human rights issues in the 2008 Torch Relay (Yang, 2015). Similarly, coverage of the Beijing 2022 Olympics in the four most widely circulated U.S. newspapers demonstrated that the Beijing Games were seldom framed through the Rising China Frame (Boykoff, 2024).

4. Integrated Representation of China

This theme refers to representations of China's politics, economy, and diplomacy in specific countries or regions. In Western media, China was generally framed negatively. For example, *The New York Times* (1949-2020) portrayed China as an economic and military threat using metaphors such as war and games, disease, animals, and machines (Shi et al., 2024). Similarly, Australian media depicted China as both a security and economic threat (Huan, 2023).

In contrast, non-Western media presented a more nuanced view. In early 21st-century Zambia and Angola, China was initially portrayed positively due to anti-colonial sentiment and its economic achievements. However, growing concerns over resource extraction and cultural tensions later resulted in more critical coverage (Jura & Kałużyńska, 2023). In the Gulf Cooperation Council (GCC) countries (2010-2020), China was generally framed as a key economic partner, though some negative portrayals—often echoing Western narratives—were also evident (Hu, 2023). This pattern suggests a mediated ideological influence through global news flows.

5. Environmental Issues

As shown in Fig-3, five studies examined China's environmental image. In Western media, coverage of China's environmental issues was largely negative. For example, *The Guardian* and *The New York Times* depicted China's smog crisis as an environmental disaster, highlighting health risks and government negligence (Liu & Li, 2017). Similarly, *The New York Times* framed China as prioritizing economic growth over environmental protection (Yang & Wang, 2023).

In contrast, environmental reporting related to China from the Global South, particularly Zimbabwean media, presented a more contested and layered portrayal of China. According to Yin (2024), Zimbabwean state-owned media presented China as a positive force for economic development. However, private media in Zimbabwe highlighted the negative environmental damage caused by Chinese mining activities.

6. Culture and Education

As shown in Fig-3, three articles focused on the representation of China's culture in the global news media, particularly the Confucius Institutes (CI), established by the Chinese government as platforms for cultural communication and Chinese language learning worldwide. Global media representations of the Confucius Institutes tended to be ambiguous and controversial. As Wang and Adamson (2015) demonstrated, U.S. media portrayed CI not only as platforms for cultural exchange but also as tools of Chinese soft power, raising concerns about national security and academic freedom.

Likewise, media representations of CIs in the Global South were often shaped by the Western media. Although some news reports in developing countries presented CIs in neutral or slightly positive terms—such as promoting cultural understanding, fostering educational cooperation, and building bridges between nations—there was still a tendency to frame CIs with suspicion (Huang, 2023).

IV. DISCUSSION

A. Overall Status of Studies on China's Image in Global News Discourse

(a). Spatial and Temporal Distribution

According to the spatial and temporal distribution shown in Fig. 2a and Fig. 2b, despite minor variations from year to year, research on China's image in news media has generally been on the rise. This upward trend in the post-2020 period suggests a growing scholarly interest in how China's image is constructed in global news discourse, possibly driven by geopolitical developments such as the COVID-19 pandemic, rising China-US tensions, and the global expansion of BRI.

However, nearly 80% of the studies on China's media image focused on the Western news media, such as the U.S., U.K., and Australia. Studies on the representation of China's image in non-Western media (Asia, Africa, and Latin America) were underexplored. This imbalanced distribution highlights a gap in the literature, underscoring the need for further research into how non-Western media represent China.

(b). Discussion on Research Approach and Theory

As shown in section 3.3, the most commonly used approach was the synergy of corpus linguistics (CL) and critical discourse analysis (CDA) that was labeled as corpus-assisted or corpus-based discourse analysis (Baker et al., 2008). Many studies (e.g., Afzaal et al., 2019; Liu et al., 2024) employed tools like AntConc, WordSmith, and SketchEngine for keyword extraction, collocation, and concordance analysis. These techniques provided insight into lexical salience and recurring patterns and semantic preferences, which helped examine discursive strategies and uncover embedded ideologies adopted in news discourse. Content analysis (14 articles) remained a popular method, particularly for identifying frames, recurring themes, and key patterns of China-related narratives over time. Nevertheless, it often focused on surface-level content and may fall short in revealing the ideological mechanisms underlying discourse (Wodak & Meyer, 2009; Fairclough, 1995). To address this limitation, some scholars (Lams, 2016; Teo & Xu, 2023) combined content analysis and CDA or corpus-based approaches to explore power relations and ideological structures embedded in news discourse that shape China's image. While most of the studies in the past decade focused on textual discourse, only a few adopted emerging methods such as sentiment analysis and multimodal discourse analysis, highlighting a potential direction for future research.

In terms of research theory, most studies adopted CDA-oriented theories or framing theory to examine power relations, ideological positioning, and discursive strategies, illustrating how media selectively highlighted certain aspects of China-related events to shape public perception (e.g., Liu et al., 2024; Yang & Wang, 2023; Yi et al., 2024). Additionally, a smaller group of scholars (e.g., Zhang, 2022; Tang, 2021) combined multiple frameworks, such as CDA with framing theory, corpus linguistics, or systemic functional linguistics, to triangulate findings and gain a more holistic understanding of the discursive construction of China's image. Furthermore, several studies (e.g., Ng, 2022; Hou, 2023; Xin & Matheson, 2015) drew on theories from political science and communication studies, reflecting a growing trend towards theoretical diversity and interdisciplinarity in this field.

B. Discussion on the Themes

After reviewing the media representations of China across six thematic categories, the findings reveal a complex and often contrasting image of China in global news discourse. In Western media, particularly in the U.S., U.K., and Australia, China is predominantly portrayed in a negative light, frequently constructed as a threat or a strategic rival. In contrast, non-Western media tend to present China more positively, though negative representations also exist. Economically, China is frequently framed as a key trading partner or trusted ally. However, on issues related to geopolitical and territorial disputes, non-Western media often adopt a more cautious or skeptical tone. These differences suggest that China's image in global media is shaped by diverse factors, including national interests, ideological positionings, cultural and geopolitical dynamics, and patterns of international media flow.

First, the varying representations of China in global news discourse may be primarily driven by ideological, cultural, and geopolitical factors. Media discourse is not entirely objective: it is shaped by specific ideologies and sociopolitical forces (van Dijk, 2006). As Zhang (2022) noted, although NYT is globally recognized, it often reflects a US-centric orientation. When reporting on China's sociopolitical affairs, the NYT tends to adopt a morally superior stance, interpreting others through US values. For example, the Chinese Dream was negatively framed with highly nationalist ideology by employing lexical items like "a vaguely defined promise," "so-called," "elusive," and "bombastic." Such portrayals exemplify an "othering" frame to reshape the original connotations of the Chinese Dream (p. 623). The othering perspective involves denying others and presenting non-Western states as the other in news discourse on the basis of one's own sociocultural norms, political systems, and ideologies. This US-led othering frame reveals how Western media construct China's image in accordance with their own geopolitical worldview.

Second, the degree of media autonomy may be another contributing factor to the diverse representations of China in global media coverage, particularly in government-controlled versus privately owned news outlets. Ng's (2022) study on Malaysian TV coverage of Najib Razak's 2016 visit to China found that state media portrayed China positively in both Malay and English outlets, highlighting themes of close friendship and economic importance. In contrast, private outlets such as *8 TV Mandarin News* framed China in a more balanced and neutral manner, focusing on business-related topics. Similarly, in Zimbabwe, state media framed China as a socially and environmentally responsible partner supporting the government's 2030 agenda, while private media emphasized grassroots criticisms of Chinese mining activities. These cases reveal that the degree of state control and audience orientation are important factors shaping China's image across different media systems.

Third, international news flow is another factor contributing to the contrasting representations of China in the global news coverage. Global news circulation continues to be dominated by Western or Eurocentric news agencies. As Eke et al. (2023) argued, the global information structure remains imbalanced, with agencies like Reuters, the Associated Press (AP), and Agence France-Presse (AFP) serving as primary gatekeepers. This dominance creates both quantitative and qualitative imbalances. Developing countries are underrepresented, and when covered, narratives frequently center on

conflict, disease, or instability (Ekeanyanwu, 2007). Hu (2023) also found that the negative portrayal of China in English-language newspapers in the GCC often originates from Anglo-American news sources, including *The New York Times*, *Washington Post*, *Guardian*, and *Reuters*. In addition, employing network analysis, Guo and Vargo (2017) confirmed that international news primarily flows from North to South, with the US and the UK playing leading roles. These Western countries control the intermedia agenda-setting and dominate the global news supply, while developing nations remain passive subjects, frequently presented through negative or stereotypical frames and relegated to the periphery of the global news system (Ekeanyanwu, 2007).

V. CONCLUSION

The present study systematically reviewed 55 peer-reviewed articles published between January 1, 2015, and December 17, 2024, that examined China's image in global news discourse. The findings reveal a steady increase in academic interest during this period, with most research focusing on China-related issues in Western media. In terms of research methodology and theory, corpus-based CDA emerged as the dominant approach, often supported by framing theory, critical discourse analysis, and, in some cases, interdisciplinary frameworks from political science and communication studies. Regarding China's media portrayal, the analysis shows that Western media, particularly in the U.S., U.K., and Australia, tend to frame China negatively, often as a threat or a strategic rival. In contrast, non-Western media presented more varied images, highlighting China's role as an economic partner, though skepticism persisted in geopolitical contexts. These divergent representations appear to be shaped by multiple factors, such as ideological positioning, national interests, cultural and geopolitical dynamics, and patterns of international media flow. However, a notable geographical imbalance persists: existing studies focus predominantly on Western media, leaving the perspectives of non-Western countries relatively underexplored.

This systematic review paper reveals several notable limitations and gaps in the study of China's image in news discourse. First, existing studies overwhelmingly focus on China's image as represented in Western media, leaving media narratives in non-Western media, such as Southeast Asia, relatively underexplored. Second, most studies center on text-based news articles, with limited attention given to visual content such as photographs and colors. Visual elements are a crucial component in meaning-making in media discourse and can significantly shape readers' perceptions through emotional framing. Therefore, future research is encouraged to consider how textual and visual modes interact in constructing China's image in media. Moreover, national image is inherently an abstract and interdisciplinary concept, shaped by a variety of social, political, and cultural factors. While many existing studies have adopted corpus-based CDA as the primary lens, future research would benefit from integrating approaches or theories from other disciplines such as international relations, media studies, or cultural studies.

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Assessing Multimodal Literacy in Indonesian Secondary Schools: Reading and Viewing Strategies in the Merdeka Curriculum

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Abstract—This study investigates multimodal literacy assessment practices in Indonesian secondary schools implementing the Merdeka Curriculum, focusing on reading and viewing strategies in the English language. Using a qualitative design, this study analysed 210 assessment items and conducted interviews with 12 teachers. The findings reveal a dominant reliance on written discourse (69.43%), with minimal use of multimodal elements such as infographics (2.56%) and images (0.62%), while audio-visual materials were entirely absent from the corpus. A significant proportion of multimodal stimuli were found to be ineffective (32.87%) because students could respond without engaging with the materials. The assessment tasks predominantly targeted lower-order thinking skills, with only 1.67% of items requiring evaluation and 5.74% requiring knowledge creation. Teacher interviews highlighted challenges related to selecting relevant multimodal stimuli, time-consuming grading processes, and insufficient training in multimodal assessment design. The study concludes that systematic teacher training, stronger institutional support, and the development of clearer assessment frameworks are needed to align practices with the goals of the Merdeka Curriculum.

Index Terms—multimodal literacy, assessment practices, reading strategies, viewing strategies, Merdeka Curriculum

I. INTRODUCTION

In the digital age, literacy is no longer confined to reading and writing printed texts. Contemporary communication increasingly relies on multimodal texts that integrate linguistic, visual, auditory, and interactive resources. Social media platforms, online news portals, digital infographics, and video-sharing applications such as TikTok and YouTube illustrate how meaning is constructed through the orchestration of multiple modes of communication. As Campbell and Olteanu (2024) observed, literacy is fundamentally reshaped by multimodality, requiring learners to decode written texts and interpret, evaluate, and create meanings across diverse semiotic forms. Scholars argue that this expanded view of literacy is essential for preparing students to engage with the complexities of 21st-century communication (Domínguez Romero & Bobkina, 2021; Martínez-Bravo et al., 2022; Mirra & Garcia, 2021).

The recognition of multimodal literacy has led to significant changes in pedagogy and assessments. In Australia, multimodal texts have been systematically integrated into national assessments, requiring students to interpret visual-verbal combinations in standardised tests (Agustin et al., 2024). In Singapore, the English curriculum emphasises multimodal literacy, with students expected to analyse images, infographics, and audiovisual texts alongside written discourse (Komninos & Starc, 2024; Pang, 2020). In Canada, multimodal assessments have been linked to student engagement and resilience, underscoring their broader educational impacts (Li et al., 2024). These developments show how assessment practices have shifted from evaluating the basic comprehension of linear texts to measuring higher-order competencies such as critical analysis, synthesis, and creative production across modalities.

However, Indonesia presents a different scenario. The introduction of the Merdeka Curriculum has placed literacy, higher-order thinking, and student-centred learning at the core of educational reforms. The curriculum promotes authentic multimodal assessments that reflect the reality of digital communication. The Sekolah Penggerak program was designed to pioneer innovative pedagogical practices and serve as a model for broader implementation throughout Indonesia. Despite these policy shifts, empirical evidence indicates that classroom practices remain heavily reliant on written texts and conventional assessments (Al-Awawdeh & Kalsoom, 2022; Vogt et al., 2020). Teachers continue to use familiar test formats, and when multimodal tasks are included, they are often employed decoratively rather than meaningfully.

This discrepancy between policy aspirations and classroom realities highlights a significant research gap in the literature. While multimodal literacy has been extensively examined in developed contexts such as Australia, Canada,

and Singapore, studies in Indonesia are scarce. Research has largely focused on conventional literacy skills, with little attention paid to the practical implementation of multimodal assessment. Even studies discussing multimodal pedagogy often overlook how comprehension-based strategies—particularly reading and viewing—are assessed. This lack of systematic investigation is critical because reading and viewing strategies are central to multimodal literacy. Reading strategies extend beyond decoding and include identifying the main ideas, making inferences, and critically evaluating textual structures (Moir et al., 2020). Viewing strategies involve interpreting meaning from images, infographics, and videos, requiring students to analyse visual design, symbolism, and perspectives (Chen & Friis, 2024; Gross, 2024). Both are essential for fostering critical engagement; however, their roles in assessment remain underexplored in Indonesia.

This research gap is significant for several reasons. First, without the adequate integration of multimodal elements, assessment practices risk undervaluing students' literacy competencies, particularly their ability to interpret and critique non-linguistic forms of communication. Second, the absence of a systematic multimodal assessment could undermine the goals of the Merdeka Curriculum, which seeks to foster higher-order thinking skills and prepare students for complex communication. Third, the lack of empirical studies from developing countries means that global debates on literacy reform are dominated by perspectives from the Global North, leaving out the unique challenges and opportunities present in Indonesia.

Therefore, this study aims to explore multimodal literacy assessment practices in Indonesian secondary schools, specifically focusing on the integration of reading and viewing strategies. By analysing assessment instruments and exploring teachers' perspectives, this study seeks to answer the following questions: (1) How are reading and viewing strategies assessed in multimodal literacy practices? (2) To what extent do these assessments support higher order thinking? (3) What challenges do teachers face in developing and implementing multimodal assessments?

This study contributes to the literature in three main ways. Theoretically, this study enriches the scholarship on multimodal literacy by examining often-overlooked dimensions of reading and viewing assessments. Empirically, it provides valuable evidence from Indonesia, a developing context in which multimodal assessments have been underexplored. Practically, it offers insights for teachers, curriculum designers, and policymakers to align assessment practices with the goals of the Merdeka Curriculum. By positioning the study within both global debates and national reforms, this research bridges the gap between policy ideals and classroom realities, highlighting pathways to strengthen multimodal-literacy-education in Indonesia.

II. LITERATURE REVIEW

A. *Multimodal Literacy: Conceptual Foundations*

The definition of literacy has significantly expanded in the digital era. Traditionally, literacy has been understood as the ability to read and write in printed texts. However, it is increasingly viewed as a multimodal competence involving the interpretation and production of meaning across linguistic, visual, auditory and interactive modes. Kress (2010) conceptualized multimodal literacy as the orchestration of diverse semiotic resources in communication, whereas Shonfeld et al. (2021) and Lim et al. (2023), and Bojórquez-Roque et al. (2024) emphasized its role in preparing learners to navigate digital environments. This broader definition underscores that literacy is now more complex and expansive, requiring critical engagement with multimodal texts in everyday and academic contexts. Thus, multimodal literacy is seen as a crucial 21st-century skill that enables learners to analyse and synthesise information across modes, interpret infographics and audiovisual materials, and engage meaningfully in digital communication. Lam and Putri (2024) argue that multimodal literacy is closely linked to critical thinking, creativity, and digital citizenship, all essential competencies for contemporary learners.

B. *Multimodal Literacy Assessment*

Despite the widespread recognition of multimodal literacy, its assessment has not developed at the same pace as its conceptualisation. Traditional assessments primarily focus on written comprehension, often overlooking the broader competencies required for multimodal literacies. In contrast, multimodal literacy assessment involves evaluating how learners interpret, analyse, and produce meaning using multiple modes (Azorín et al., 2020; Beltrán-Palanques, 2024; Tan et al., 2020). There are two key approaches to multimodal literacy assessment: performance-based and reflective assessments. Performance-based assessments involve evaluating students' multimodal creations, such as presentations, videos, or infographics. While this approach emphasises authenticity and creativity, it requires clear rubrics to ensure validity. In contrast, reflective assessments ask learners to explain the reasoning behind their multimodal choices, providing insights into their understanding of semiotic interactions (Kohnke et al., 2021).

In global contexts, such as Australia and Singapore, multimodal literacy is integrated into national assessments, with students required to engage with visual, oral, and written components (Lim & Unsworth, 2023). However, challenges persist, including a lack of teacher confidence, heavy workloads, and difficulties in aligning multimodal resources with learning objectives (Li, 2020; Liu & Lo, 2025). These challenges demonstrate that multimodal assessment, while aspirational, has not yet been fully realised in many educational settings.

C. *Reading and Viewing Strategies in Multimodal Literacy*

Traditionally associated with decoding and comprehending written texts, reading strategies now extend to digital and

multimodal environments, such as video lectures. These strategies include identifying main ideas, making inferences, and evaluating textual structures in print and digital formats (Chu, 2020). In multimodal contexts, students must synthesise visual and textual cues, such as interpreting graphs and written explanations. In contrast, viewing strategies involve the ability to critically interpret visual and audio-visual materials. González-Martín et al. (2022) describe these as the skills required to analyse composition, colour, and symbolism in images or videos, while Kwangmuang et al. (2021) highlight their potential to foster higher-order thinking, even among young learners. However, Gijzen et al. (2024) noted that viewing tasks are often used at the surface level, requiring recall rather than critical analysis.

Together, reading and viewing strategies are foundational to multimodal literacy, enabling learners to navigate and evaluate meaning across different modes. Thus, assessing these strategies is essential for understanding students' full literacy competencies. However, empirical studies focusing specifically on how these strategies are assessed are scarce.

D. Multimodal Literacy in the Indonesian Context

In Indonesia, the Merdeka Curriculum seeks to reform pedagogy and assessment by emphasising critical thinking, creativity, and authentic learning. Literacy is broadly defined as engagement with multimodal texts in line with global trends. The Sekolah Penggerak program was designed to pioneer these innovations. Despite these policy directions, classroom practices in Indonesia remain largely centred on text-based assessment (Anwas et al., 2022; Marmoah & Poerwanti, 2022). Although some studies have focused on digital literacy (Lim et al., 2023), systematic investigations of multimodal assessments remain scarce. When multimodal elements are included, they are often used decoratively rather than pedagogically, with tasks that primarily target lower order thinking skills. Teachers also report insufficient training and support in designing multimodal assessments, which limits their ability to implement them effectively.

E. Research Gap

The literature shows that multimodal literacy is recognised globally as a central competency, with its assessment emphasised in many educational systems. However, significant gaps remain in our understanding of how multimodal literacy is assessed in developing contexts such as Indonesia. Specifically, the systematic exploration of integrating reading and viewing strategies into assessments has been lacking. Most Indonesian studies continue to focus on conventional literacy or general digital skills, leaving unanswered questions about how multimodal assessment is implemented in classrooms and how it aligns with the curriculum goals. This study addresses this gap by focusing on multimodal literacy assessment in Indonesian secondary schools, with particular attention to reading and viewing strategies. This study contributes to the global literature by providing evidence from an underexplored context and informing national reforms by identifying the opportunities and challenges of implementing multimodal assessments in practice.

III. METHODS

A. Research Design

This study employed a qualitative content analysis design (Mayring, 2022), complemented by semi-structured interviews, to investigate multimodal-literacy assessment practices in Indonesian secondary schools. Content analysis was chosen for its ability to systematically examine both textual and visual data within authentic assessment instruments, while interviews provided insights into teachers' reasoning, challenges, and perspectives. This mixed-method approach allowed for a more comprehensive understanding of multimodal literacy assessment in the context of the Merdeka Curriculum in Indonesia.

B. Research Context and Participants

The study was conducted in six Sekolah Penggerak located in various districts of three regencies: Sragen, Solo, and Klaten in Central Java, Indonesia. These schools were selected through purposive sampling to ensure diversity in geographical location, institutional profile, and teacher experience. Twelve teachers participated in this study, all of whom were Indonesian language teachers responsible for designing literacy assessments at their respective schools. Written consent was obtained from all participants, and their identities were kept confidential by using pseudonyms to ensure their anonymity.

C. Data Sources

This study used two primary data sources. First, 210 assessment items were collected from written tests, worksheets, and examination papers used in the participating schools over one academic year. These items provided a foundation for content analysis. Second, semi-structured interviews were conducted with the 12 teachers to capture their experiences, rationales, and challenges in designing and implementing multimodal assessments. The combination of document analysis and interviews allowed for triangulation, thereby enhancing the validity of the findings.

D. Coding Scheme and Analytical Framework

The coding scheme for the assessment items was developed deductively and inductively. Deductive categories were based on established frameworks in multimodal literacy and Bloom's Revised Taxonomy (Anderson & Krathwohl, 2001; Grapin & Kranzler, 2018; Kress, 2010). Three main dimensions were considered.

1. Modalities Used: Each assessment item was classified according to the type of modality used (e.g., written discourse, infographic, image, audio-visual, or no text task).
2. Stimulus Effectiveness: Stimuli were coded as either effective (i.e., necessary for answering the question and enhancing comprehension) or ineffective (i.e., irrelevant or redundant to the task).
3. Cognitive Level: Each item was categorised according to Bloom's Revised Taxonomy, ranging from C1 (remembering) to C6 (creating).

Inductive coding was applied to the interview data, with themes emerging around teachers' challenges, strategies, and reflections on their assessment practices. These themes were subsequently compared with quantitative data from the assessment analysis to provide an integrated interpretation of the results.

E. Inter-Coder Reliability and Validity

To enhance the trustworthiness of the coding, two researchers independently coded a subset of 30 assessment items (approximately 15% of the total number of items). Inter-coder reliability was calculated using Cohen's kappa, which yielded a high agreement rate of 0.86. Discrepancies between coders were discussed and resolved through consensus, and a refined coding scheme was applied to the remaining items after that. To further strengthen the validity, data triangulation was used by comparing the findings from the assessment items with the teachers' interview responses. Member checking was conducted with four teachers who reviewed the preliminary findings to ensure their accuracy and credibility.

F. Data Analysis Procedures

Data analysis was conducted in multiple stages as follows. First, the 210 assessment items were coded according to three dimensions (modalities used, stimulus effectiveness, and cognitive level). Frequencies and percentages were calculated for each category, and the results were presented using descriptive statistics tables. These statistics were visualised in tables and figures to highlight patterns in modality distribution, stimulus effectiveness, and cognitive levels.

Second, thematic analysis was applied to the interview data to identify key themes. Thematic categories, such as "stimulus selection", "workload constraints", and "professional development needs", were identified in the interview transcripts. These themes were compared with the quantitative results from the content analysis to identify any convergence or divergence in the results. Finally, the findings from both data sources were integrated into a narrative synthesis that provided a comprehensive overview of multimodal literacy assessment practices in Indonesian secondary schools.

G. Ethical Considerations

Ethical approval for this study was obtained from the Research Ethics Committee of the university affiliated with the project. Teachers were assured of confidentiality and anonymity, and pseudonyms were used in all reports to protect their identities. Participation in the study was voluntary, and the teachers were informed that they could withdraw from the study at any time, without penalty.

IV. FINDINGS AND DISCUSSION

A. Findings

This section presents the findings of this study on multimodal literacy assessment practices in Indonesian secondary schools implementing the Merdeka Curriculum. The results were categorised into four thematic areas: (1) the use of multimodal texts in assessments, (2) the effectiveness of problem stimuli, (3) the distribution of cognitive levels in assessment tasks, and (4) the challenges teachers face in designing and implementing such assessments. Each theme was supported by quantitative data, visual representations, and qualitative insights from the teachers' interviews.

(a). Use of Multimodal Texts in Literacy Assessment

Analysis of the 210 assessment items revealed a significant imbalance in the use of different modalities. Written discourse overwhelmingly dominated the assessments, accounting for 69.43% of the items. In contrast, infographics and images accounted for only 2.56% and 0.62% of items, respectively. Audiovisual materials, such as videos, were not included in the assessments.

TABLE 1
DISTRIBUTION OF MULTIMODAL TEXTS IN ASSESSMENT ITEMS

Instrument	Written Discourse (%)	Infographics (%)	Images (%)	No Text (%)
1	86.00	0.00	0.00	14.00
2	85.00	0.00	0.00	15.00
3	68.57	2.86	0.00	28.57
4	62.50	12.50	0.00	25.00
5	18.52	0.00	3.70	77.78
6	96.00	0.00	0.00	4.00
Average	69.43	2.56	0.62	27.39

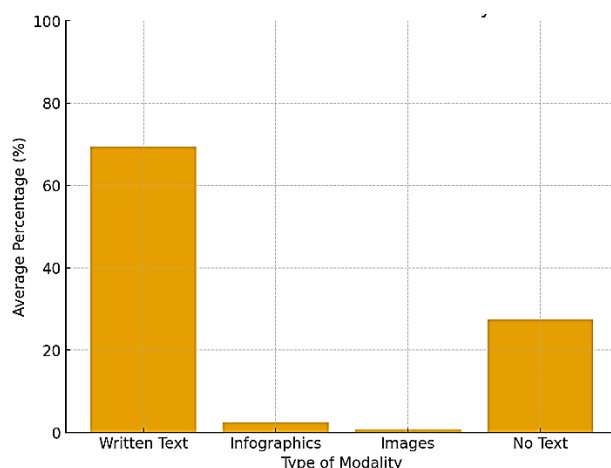


Figure 1. Distribution of Multimodal Texts in Literacy Assessment

The data in Figure 1 clearly show a dominant reliance on written text in the assessments, with nearly 70% of the items consisting solely of written discourse. The minimal inclusion of visual elements, such as infographics and images, indicates that students are rarely provided with opportunities to engage in multimodal interpretation. The complete absence of audiovisual materials suggests that students are not encouraged to critically engage with the multimodal texts they encounter in their daily lives.

A teacher from School 2 explained the situation as follows:

"We know that infographics or pictures can make students think more critically, but it is not easy to design good questions with them. Most of us prefer to stick with texts because it is safer and more familiar".

(b). Effectiveness of Problem Stimuli

The effectiveness of the multimodal stimuli used in the assessments was also evaluated. The stimuli were categorised as either effective or ineffective based on whether they were necessary for answering the question and whether they contributed to students' comprehension. Approximately 67% of the stimuli were effective, whereas the remaining 32.87% were ineffective. Ineffective stimuli included cases where visual elements were irrelevant to the task, allowing students to answer without engaging with the multimodal material.

TABLE 2
EFFECTIVENESS OF PROBLEM STIMULI

Instrument	Effective Stimuli (%)	Ineffective Stimuli (%)
1	62.79	37.21
2	76.47	23.53
3	76.00	24.00
4	50.00	50.00
5	50.00	50.00
6	87.50	12.50
Average	67.13	32.87

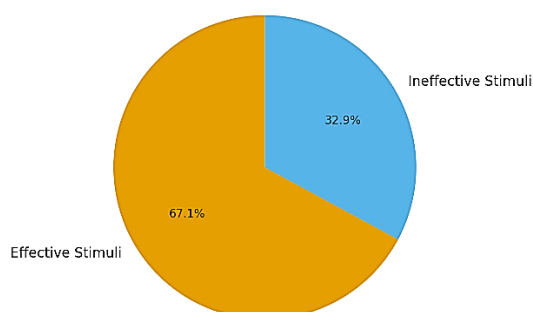


Figure 2. Effectiveness of Problem Stimuli

Figure 2 shows that while most multimodal stimuli were effective, nearly one-third (32.87%) were not. This indicates that the integration of multimodal elements does not always enhance learning, and in some cases, visual resources are used more for decorative purposes than for pedagogical ones. This highlights a significant issue in the design of multimodal assessments: simply including visual elements does not automatically enhance students' learning or their engagement.

One teacher from School 5 remarked:

"Sometimes we add pictures just to make the questions more interesting, but we realise later that the pictures do not really help students think. They can answer without even looking at them".

(c). *Distribution of Cognitive Levels in Assessment Tasks*

The cognitive demand of the assessment tasks was analysed using Bloom's Revised Taxonomy. The analysis showed that most assessment items targeted lower-order thinking skills (LOTS), with remembering (C1) and applying (C3) comprising nearly half of the total tasks. Tasks that required evaluation (C5) or creation (C6) were extremely limited, comprising only 1.67% and 5.74% of the total tasks, respectively.

TABLE 3
DISTRIBUTION OF COGNITIVE LEVELS IN LITERACY ASSESSMENT ITEMS

Instrument	C1 (%)	C2 (%)	C3 (%)	C4 (%)	C5 (%)	C6 (%)
1	16.0	12.0	52.0	16.0	4.0	0.0
2	2.5	35.0	2.5	60.0	0.0	0.0
3	22.86	20.0	2.86	48.57	0.0	5.71
4	25.0	0.0	25.0	25.0	0.0	25.0
5	70.37	11.11	11.11	3.7	0.0	3.7
6	4.0	22.0	46.0	22.0	6.0	0.0
Average	23.45	18.72	23.24	29.21	1.67	5.74

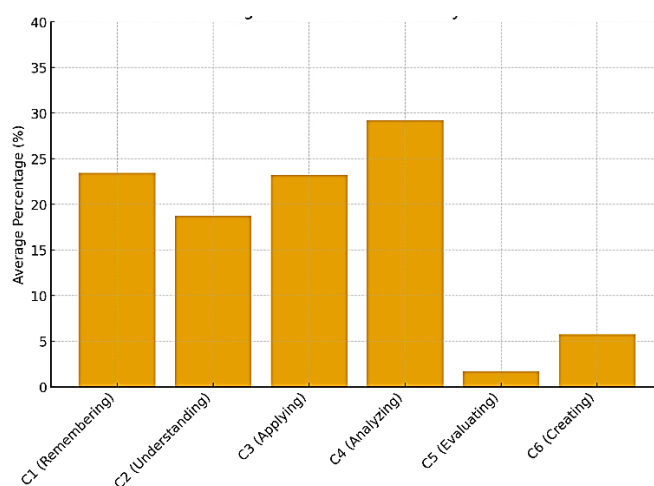


Figure 3. Distribution of Cognitive Levels in Literacy Assessment

As shown in **Figure 3**, most assessment items focused on lower-order thinking skills (C1 and C3), with minimal attention to higher-order thinking skills (C5 and C6). The lack of tasks that required evaluation or creation indicates that the assessments were not fully aligned with the Merdeka Curriculum's emphasis on higher order thinking.

A teacher from School 3 shared the following statement:

"We want to create HOTS questions, but honestly, it is difficult. Designing questions that ask students to evaluate or create using multimodal texts takes a lot of time and skill, which many of us are still developing".

(d). *Teacher Challenges in Developing Multimodal Assessments*

Interviews with teachers revealed three major categories of challenges. First, teachers reported difficulty in selecting appropriate multimodal stimuli that aligned with the learning objectives. Second, the time-consuming nature of grading multimodal tasks has discouraged teachers from regularly using them. Third, limited professional development and training meant that teachers often lacked the necessary skills and confidence to design effective multimodal assessments.

A teacher from School 6 stated:

"Choosing the right texts for HOTS questions is difficult because we have to consider many factors, from relevance to objectives to the complexity of the modalities".

Similarly, another teacher from School 1 commented on the workload issue:

"Grading multimodal questions is much more time-consuming. We have to check not only the written responses but also how students interpret images or other elements".

These challenges suggest that teachers' reluctance to implement multimodal assessments is not due to a lack of interest, but rather a reflection of systemic barriers, such as limited training and high workloads.

B. *Discussion*

The findings of this study provide valuable insights into the current state of multimodal literacy assessment practices in Indonesian secondary schools under the Merdeka Curriculum. These findings reveal several key issues that must be addressed to align assessment practices with curriculum goals, particularly in relation to multimodal literacy. This section discusses the dominant reliance on text-based assessments, superficial use of multimodal stimuli, limited cognitive

demand of tasks, and challenges faced by teachers in the implementation of multimodal assessments. These findings are discussed in light of global practices and the challenges of implementing multimodal assessments in developing contexts.

(a). Dominance of Text-Centered Assessment

One of the most striking findings of this study is the overwhelming reliance on written discourse in assessments. Nearly 70% of the items were based solely on written text, with minimal use of other modalities, such as infographics, images, or audiovisual materials. This finding is consistent with previous research showing that despite the global recognition of multimodal literacy, written texts continue to dominate assessments in many educational systems, even in contexts where multimodal literacy is considered essential (Tan et al., 2020). The lack of visual and audiovisual elements in Indonesian assessments is concerning, as it limits students' opportunities to engage with the multimodal texts that they encounter daily in their digital environments (García & Kleifgen, 2020; Stockwell, 2018).

In comparison, countries such as Australia and Singapore have integrated multimodal texts into their assessments, recognising the importance of evaluating students' abilities to decode and synthesise meaning from both visual and verbal sources (Lim & Unsworth, 2023). The absence of multimodal stimuli in Indonesian assessments suggests that Indonesian students are not adequately prepared to engage with multimodal texts, which are increasingly prevalent in academic and everyday contexts. As García and Kleifgen (2020) emphasise, literacy in the 21st century requires the ability to interpret and synthesise meaning across linguistic and visual forms, a competency that is not being adequately addressed in current Indonesian assessments.

(b). Stimuli: Between Decoration and Pedagogy

Another significant finding concerns the use of multimodal stimuli in the learning process. While some multimodal elements were included in the assessments, a considerable portion (32.87%) was found to be ineffective, as students could answer the questions without engaging with the multimodal materials. This suggests that in many cases, multimodal stimuli were used for decorative purposes rather than being meaningfully integrated into tasks. This finding aligns with what Yin et al. (2024) refer to as "tokenistic multimodality", where visual resources are included in assessments but do not contribute to the learning process.

This issue is not unique to Indonesia; similar patterns have been observed in other educational systems where multimodal elements have been incorporated without a clear pedagogical rationale for their inclusion. International best practices emphasise that multimodal resources must be carefully aligned with learning objectives to enhance their validity (Suleiman & Hussein, 2024; Xu et al., 2023). For example, in Canada, multimodal tasks are intentionally designed to stimulate reflection and critical analysis, ensuring that visual and textual elements work together to foster higher order thinking (Ding et al., 2022). In contrast, the Indonesian case demonstrates that without a clear alignment between multimodal stimuli and assessment objectives, these elements can become superficial, undermining their potential to enhance the learning process.

(c). Cognitive Levels and the HOTS Gap

The distribution of cognitive levels in the assessments also revealed a significant gap between the goals of the Merdeka Curriculum and the actual tasks implemented in the classroom. Most of the tasks (nearly 70%) focused on lower-order thinking skills (LOTS), such as remembering and applying, while only a small percentage (1.67%) required higher-order thinking skills (HOTS), such as evaluation and creation. This imbalance between LOTS and HOTS is concerning because the Merdeka Curriculum explicitly aims to promote higher-order thinking among students, encouraging them to engage critically with content and create new knowledge (Anwas et al., 2022; Kosasih et al., 2022).

Research has shown that multimodal tasks can effectively promote HOTS development by engaging students in analytical reasoning, creativity, and problem-solving (Pantaleo, 2024). However, in Indonesia, teachers have reported difficulties in designing HOTS-oriented multimodal questions, highlighting the time-consuming nature of creating such tasks and the lack of professional development opportunities for teachers. This finding suggests that the Merdeka Curriculum's emphasis on higher-order thinking cannot be fully realised unless multimodal assessments are designed to promote these skills. Furthermore, systemic barriers, such as large class sizes and high workloads, exacerbate the challenges teachers face in implementing multimodal assessments (Choi & Yi, 2016; Molavi, 2024).

(d). Teacher Challenges: Structural and Capacity Constraints

The teachers in this study reported several challenges in designing and implementing such assessments. These challenges are primarily related to the selection of appropriate multimodal stimuli, the time-intensive nature of grading multimodal tasks, and a lack of professional training in the design of multimodal assessments. These findings are consistent with international research, which highlights that teachers often struggle to integrate multimodal tasks into their assessments because of a lack of resources, support, and confidence (Hafner & Ho, 2020; Jones et al., 2020).

The time burden associated with grading multimodal tasks was particularly significant in the present study. Teachers reported that evaluating students' responses to multimodal tasks was much more time-consuming than grading traditional text-based assessments. This is particularly challenging in Indonesia, where large class sizes and limited institutional support place additional strain on teachers. Without adequate training and institutional support, teachers are unlikely to incorporate multimodal elements into their assessments, even when they recognise the potential benefits.

(e). Theoretical and Practical Implications

The findings of this study have significant implications for both theory and practice. Theoretically, this study contributes to the global literature on multimodal literacy by highlighting gaps in multimodal literacy assessment, particularly in developing contexts such as Indonesia. Empirically, it provides valuable evidence from Indonesia, a country that has been largely overlooked in global discussions of multimodal literacy. Practically, this study underscores the need for systemic efforts to build teacher capacity, provide institutional support, and develop clearer assessment frameworks that align multimodal designs with cognitive demand.

At the national level, the findings point to the need for stronger coherence between curriculum, pedagogy, and assessment in Indonesia's teacher-education programmes. The misalignment between the goals of the Merdeka Curriculum and current assessment practices highlights the importance of developing a more systematic approach to multimodal literacy assessments. At the international level, the Indonesian case contributes to understanding how systemic and capacity-related challenges can hinder the effective implementation of multimodal assessments in resource-constrained settings.

V. CONCLUSION

This study examined multimodal literacy assessment practices in Indonesian secondary schools under the Merdeka Curriculum, focusing on reading and viewing strategies in English. The analysis of 210 assessment items and teacher interviews revealed several key issues. First, there is a consistent reliance on text-based assessments, with minimal use of multimodal stimuli, such as images, infographics, and audiovisual materials. Second, the multimodal stimuli included were often ineffective because they did not contribute meaningfully to student learning. Finally, the assessments predominantly targeted lower-order thinking skills, with few tasks requiring higher-order skills such as evaluation and creation. These findings suggest that current assessment practices are not fully aligned with the goals of the Merdeka Curriculum, which aims to foster critical thinking and multimodal literacy among students in the learning process.

This study highlights the need for significant improvements in the integration of multimodal elements into the assessments. The dominance of written texts, coupled with the superficial use of visual and audio-visual resources, limits students' opportunities to engage with the multimodal texts they encounter daily in the digital age. To better align assessments with the goals of the Merdeka Curriculum, it is crucial to ensure that multimodal elements are meaningfully integrated into tasks to enhance engagement and learning outcomes. Furthermore, assessments must be designed to promote higher-order thinking skills, particularly in the evaluation and creation of content across different modalities.

Teacher interviews revealed several challenges in designing and implementing multimodal assessments. These include difficulties in selecting appropriate multimodal stimuli, the time-consuming nature of grading multimodal tasks, and a lack of professional development in multimodal assessment designs. These challenges suggest the need for more comprehensive teacher training and institutional support to enable the effective implementation of multimodal assessment practices. The development of clear frameworks and guidelines for multimodal assessments is also essential to ensure that these assessments contribute meaningfully to students' literacy development.

This study makes several important contributions to existing literature. Theoretically, this study enriches the global literature on multimodal literacy by exploring the often-overlooked dimensions of reading and viewing strategies in multimodal assessment. Empirically, it provides valuable insights into Indonesia, a context that has been largely overlooked in the global discussions of multimodal literacy. Practically, it offers recommendations for educators, curriculum designers, and policymakers to align assessment practices with the goals of the Merdeka Curriculum. Specifically, it underscores the need for clearer frameworks, systematic teacher training, and institutional support to ensure the effective integration of multimodal assessments that foster higher-order thinking skills.

Moving forward, addressing the gaps identified in this study is essential. Reforms should focus on integrating multimodal elements into assessments in a pedagogically meaningful way, ensuring that assessments reflect the skills and competencies outlined in the Merdeka Curriculum. Furthermore, efforts should be made to build teacher capacity through professional development programs and provide adequate resources and support to facilitate the successful implementation of multimodal assessments. Additional research is needed to explore the broader implementation of multimodal literacy assessments in different educational contexts, particularly in relation to formative assessment practices and the integration of multimodal literacy into everyday classroom teaching. By addressing these challenges, Indonesia can better prepare its students to meet the multimodal demands of the 21st century.

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Students' Multilingual Practices in the English Classroom in Kazakhstan

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Abstract—This study seeks to contribute to the ongoing discussions of multilingualism in the English classroom and intends to explore forms of multilingualism in a formal classroom context, being the first effort to document Kazakh students' authentic interactions involving Kazakh, Russian and English in the English classroom. Using a mixed-methods approach, this study investigates the use of languages and types of multilingualism in students' group discussions, supported by quantitative and qualitative data from a sociolinguistic survey. The results reveal a dynamic and integrated use of English, Russian and Kazakh during formal student discussions, with English being dominant and Russian and Kazakh making significant contributions. Kazakh students are shown to engage in diverse multilingual behaviors, including various forms of code-switching (intra-sentential, extra-sentential, intra-word) serving different functions (such as reference, discourse markers and structural roles). Survey results indicate harmonious interaction among the three languages and frequent multilingual usage, underscoring the fluid and integrated language practices in Kazakhstan's educational settings. Although opinions vary on whether students should adhere to using a single language in certain contexts, the common practice and positive view of employing multiple languages is recognized. These findings highlight students' flexible multilingual competence, which supports adaptable communication shaped by context. The study offers valuable empirical evidence for language policy, teaching methods and sociolinguistic theory in multilingual post-Soviet environments.

Index Terms—multilingualism, code-switching, sociolinguistics, language practice, university students

I. INTRODUCTION

Research on multilingualism in English classrooms across the globe is a vibrant and rapidly growing area, mirroring the increasing linguistic diversity found in educational contexts. Over the last ten years, there has been a remarkable rise in studies on multilingualism within ESL and EFL settings, with a particular emphasis on teachers' viewpoints and instructional methods (Burner & Carlsen, 2023). Some research focuses on how students position themselves in relation to language, which affects their engagement and motivation, enabling them to actively shape their multilingual identities both inside and outside the classroom (Weidl & Erling, 2025). Additionally, investigations highlight the variety of language practices students employ and uncover the sociolinguistic complexities inherent in multilingual

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educational environments (Tai et al., 2025). These studies commonly emphasize the necessity of acknowledging and incorporating students' multilingual language practices into teaching approaches to support effective learning.

Recent research on multilingual education highlights the dominant role of English as a second language or a primary medium of instruction (Sahr, 2020). However, unlike many European and Asian nations, Kazakhstan lacks the natural conditions for English to develop as an actively used language, which shapes the unique nature of multilingualism in the country. In recent years, Kazakhstan has undertaken significant reforms in its education system, prioritizing multilingual education as a strategic response to the nation's social and economic realities (Zhumay et al., 2021). According to this governmental initiative, education serves as a "conveyor belt" for building a multilingual society (Agbo et al., 2022), aiming for proficiency in three languages: Kazakh as the state language, Russian as the language of interethnic communication and English as the language of international communication. This distinct context in Kazakhstani education calls for the development of a new multilingual education model, where knowledge of Kazakh, Russian and English creates favorable opportunities for integration into global education, science, and technology (Nurlanova et al., 2022; Yeskeldiyeva & Tazhibayeva, 2015) while simultaneously preserving national and ethnic identity (Pangereyev et al., 2023).

Given the significant role of English in academic and professional fields (Shunkeyeva et al., 2020), English classrooms in Kazakhstan serve as important settings for examining multilingualism as a complex and evolving reflection of the country's linguistic situation. Goodman et al. (2024) explore how English-medium instruction (EMI) is implemented within Kazakhstan's distinct sociolinguistic environment, where English is promoted alongside the predominant local languages, Kazakh and Russian. Zhunussova et al. (2023) study how multilingual students at EMI universities in Kazakhstan construct their identities, showing how they navigate between local and global cultural affiliations. Utegenova et al. (2024) emphasize the linguistic characteristics of student speech, highlighting frequent and purposeful code-switching among Kazakh, Russian and English in academic interactions. Their sociolinguistic survey data indicate that the simultaneous use of these three languages in education reflects the trilingualism policy aimed at preparing skilled professionals fluent in Kazakh, Russian and English. Nonetheless, survey findings from Kurmanova et al. (2024) reveal that Kazakh students still struggle to clearly understand how these languages can be integrated effectively in specialized subject studies and what advantages such integration might offer for effective communication in the classroom.

Although there is increasing interest in exploring Kazakh students' attitudes toward multilingualism within the educational setting, there has been limited focus on how the three languages actually interact during English classes. This study represents the first effort to document Kazakh students' verbal interactions involving Kazakh, Russian and English throughout the learning process. Employing a mixed-methods design, the research examines how students utilize and blend these three languages in a formal classroom context, highlighting the relevant use of languages and types of multilingualism in group discussions in English lessons. By analyzing authentic student conversations alongside responses from a sociolinguistic survey, the study seeks to contribute to the ongoing discussions of multilingualism in the English classroom while providing evidence to inform language education policies and practices both in Kazakhstan and other multilingual environments.

II. METHODOLOGY

A. Research Design

The current study employs an embedded mixed-methods design (Creswell & Plano-Clark, 2011) and unfolds in two stages. The first stage involves the analysis of Kazakh university students' use of Kazakh, Russian, and English during group discussions. The second stage consists of an online survey assessing students' perceptions and attitudes towards multilingualism within the educational process. Such a design integrates qualitative and quantitative data (group discussions) within a broader quantitative and qualitative framework (survey), allowing for a comprehensive exploration of multilingual practices and attitudes. The mixed-methods approach enables the study to benefit from the depth of qualitative insights while grounding findings in quantitative evidence, enhancing overall understanding of students' multilingual competencies and perspectives.

B. Participants

The study sample includes 446 undergraduate students, aged 17 to 21, enrolled in multilingual groups with different specializations in the Pedagogy field at K. Zhubanov Aktobe Regional University, Kazakhstan. All 446 students participated in the online survey, and 27 agreed to participate in group discussions in class. Table 1 presents the frequencies (percentages) of variables such as age, gender, native language, major, and year of study within the sample.

TABLE 1
SAMPLE PROFILE

Variable		Frequency
Age	17	146 (32.7%)
	18	248 (55.6%)
	19	37 (8.4%)
	20	10 (2.2%)
	21	5 (1.1%)
Gender	Female	304 (68.2%)
	Male	142 (31.8%)
Native language	Kazakh	436 (97.8%)
	Russian	8 (1.8%)
	Uzbek	2 (0.4%)
Major	Biology	88 (19.7%)
	Chemistry	22 (4.9%)
	Computer Science	43 (9.6%)
	Economics	12 (2.8%)
	Foreign Language	16 (3.6%)
	Geography	10 (2.2%)
	Law	73 (16.4%)
	Mathematics	78 (17.5%)
	Physics	104 (23.3%)
Year of studies	First, Bachelor	387 (86.9%)
	Second, Bachelor	54 (12.2%)
	Third, Bachelor	0 (0%)
	Fourth, Bachelor	4 (0.9%)

As seen from Table 1, the majority of research participants are 18 years old, forming 55.6% of the research sample. The gender distribution in the sample shows that female participants (68.2%) outnumber male students (31.8%) by more than two to one. This imbalance can be attributed to the common trend at K. Zhubanov Aktobe Regional University, where females predominantly enroll in Pedagogy programs. This pattern aligns with the broader observation that Pedagogy fields generally attract more female students, unlike technical universities, which tend to have a majority of male students (Aleshinskaya & Vasilieva, 2025). Furthermore, this corresponds with findings by Lippa et al. (2014), who note that women are more likely than men to work in people-centered professions such as teaching.

A predominant majority (97.8%) of students identify Kazakh as their native language. The research participants are distributed across diverse specializations, with the highest percentages in Physics (23.3%), Biology (19.7%) and Mathematics (17.5%). Other fields include Law (16.4%), Computer Science (9.6%), Chemistry (4.9%), Foreign Language (3.6%), Economics (2.8%) and Geography (2.2%). Most students (86.9%) are in their first year of the bachelor's program, with a smaller proportion (12.2%) in the second year.

Regarding the level of proficiency in three languages, most respondents reported having an Advanced proficiency level in Kazakh, while a vast majority indicated an Intermediate proficiency level for both Russian and English. Moreover, Pre-Intermediate and Elementary proficiency levels were primarily selected in relation to English. Figure 1 shows the distribution of proficiency levels in Kazakh, Russian, and English within the research sample.

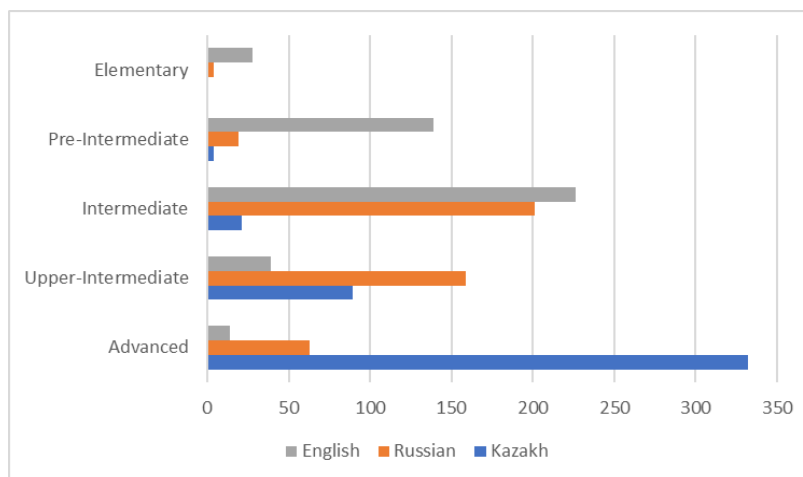


Figure 1. Level of Proficiency in Three Languages

Figure 2 presents how respondents identify themselves as having different forms of multilingualism, reflecting the prevalent multilingual practices among the surveyed students. According to the figure, the largest group (59.2%) identify with the Kazakh-Russian or Russian-Kazakh bilingualism. This is consistent with Kazakhstan's sociolinguistic context, where Kazakh and Russian are the two dominant languages used in daily communication, education and administration (Zharkynbekova & Chernyavskaya, 2022). The second-largest group (26.7%) identify as Kazakh-

Russian-English trilingual speakers. This substantial number indicates that English is increasingly integrated into the linguistic repertoire of many students, reflecting its growing importance as a language of international communication and academic instruction (Kurmanova et al., 2023). Interestingly, although enrolled in a trilingual educational program, 61.9% of respondents identify themselves as bilingual rather than trilingual.

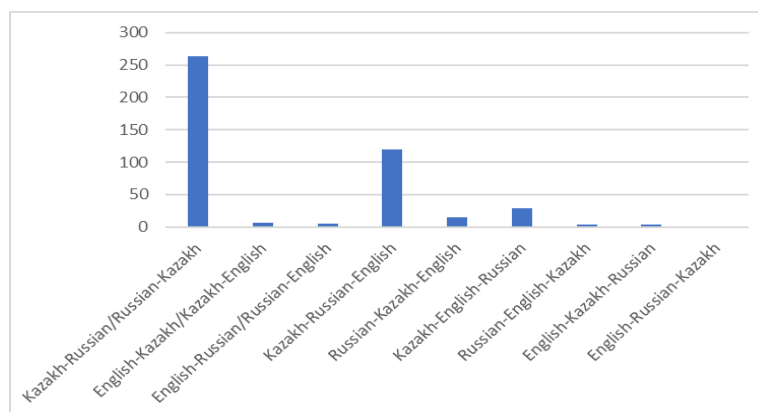


Figure 2. Forms of Multilingualism

C. Data Collection

The data for this study, both qualitative and quantitative, were collected through an online survey and observations of students' speech in Kazakh, Russian and English. Multilingual students' conversations were recorded while they discussed topics assigned by the researchers, focusing on foreign language learning and the use of different languages in various contexts. These discussions were conducted and recorded via Zoom and subsequently transcribed. Prior to the discussions, students were organized into five groups of 5–6 participants each and given 10 minutes to talk about the assigned topic. To assist students who struggled to maintain the conversation, prompts were displayed on the screen to encourage ongoing dialogue.

The online survey was conducted among undergraduate students enrolled in multilingual educational programs at K. Zhubanov Aktobe Regional University, utilizing Google Forms. It included 12 closed-ended and 2 open-ended items structured as statements and divided into two main sections. Responses to the closed-ended questions were collected using a 5-point Likert scale, ranging from 5 (strongly agree) to 1 (strongly disagree). Participants were encouraged to provide detailed answers to the open-ended questions. The first section of the survey comprised 6 closed-ended questions and one open-ended question focused on forms of multilingualism and the relative use of languages in the English classroom (Questions 1–7). The second section also contained 6 closed-ended questions and one open-ended question, concentrating on students' attitudes toward multilingualism in the English classroom (Questions 8–14). All participants provided informed consent to participate in the study and for their responses to be used for research purposes.

D. Data Analysis

The analysis of the student discussion data involved analyzing the textual properties and socio-pragmatic use of instances of multilingualism. The textual analysis dealt with how Russian and English insertions are embedded in Kazakh texts, with a focus on such formal features as morphology, word patterning, language proportions and types of code-switching such as intra-sentential, inter-sentential, extrasentential code-switching (Gumperz, 1982). The frequencies of words in each language were calculated using the software tool AntConc (Anthony, 2024), which is commonly employed in corpus linguistic research for lexical analysis. After that, we looked at the social context and pragmatic use of Russian and English elements, focusing on the functions of code-switching (Hamdan, 2023).

The quantitative survey data were processed using Google Sheets, which facilitated the calculation of frequencies and percentages for responses to the closed-ended questionnaire items. Interpretations of these responses were based on a 5-point Likert scale. For the qualitative data from the questionnaire, thematic analysis was conducted by interpreting the meanings in the respondents' detailed answers to the open-ended questions (Creswell & Plano-Clark, 2011). This qualitative analysis helped identify key themes such as the use of multilingualism in the English classroom, the proportional use of three languages, the role of multilingualism in subject learning, access to information in three languages, and the importance of multilingualism for students' future careers. Integrating both quantitative and qualitative methods provided robust and credible insights into students' use of multilingualism in English classes and their attitudes toward multilingualism in higher education.

III. FINDINGS

A. Student Discussion Results

The analysis of the students' discussions reveals the interconnected use of multiple languages, the frequency of words from each language, and the roles of code-switching within their conversations on researcher-assigned topics. The multilingual corpus created by the participants includes a total of 2,453 tokens, with 1,783 tokens (72.7%) in English, 420 tokens (17.1%) in Russian, 243 tokens (9.9%) in Kazakh, and 7 tokens (0.3%) that combine Russian and Kazakh elements. The proportions of these three languages in the students' discussions are illustrated in Figure 3.

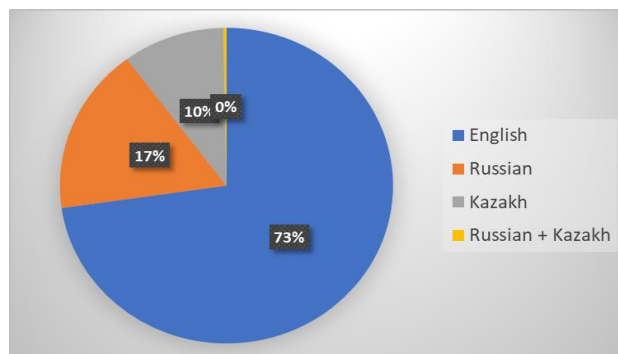


Figure 3. Share of Languages in Student Discussions

The following are the most commonly occurring words from the English, Russian and Kazakh languages in the corpus, each accompanied by their frequency in brackets. Included among the most frequently used English words are *I* (97), *in* (61), *the* (60), *and* (57), *to* (41), *it* (39), *you* (33), *English* (32), *a* (31), *language* (31). Among the most frequently used Russian words are *у* /i/ 'and' (20), *я* /ya/ 'I' (17), *на* /na/ 'on' (12), *что* /chto/ 'that' (9), *потому* /potomu/ 'because' (7), *в* /v/ 'in' (6), *не* /ne/ 'not' (6), *язык* /yazyk/ 'language' (6), *мне* /mne/ 'me' (5), *но* /no/ 'but' (5), *это* /eto/ 'this' (5). Among the most frequently used Kazakh words are *қазақша* /kazaksha/ 'Kazakh' (6), *күнделікті* /kyundelikti/ 'everyday' (5), *себебі* /sebebi/ 'because' (5), *тілі* /tili/ 'language' (5), *ағылшынша* /agylshynsha/ 'English' (4), *және* /zhene/ 'and' (4), *менің* /menin/ 'my' (4), *тілде* /tilde/ 'on language' (4). In addition to personal pronouns, the words often inserted from the Russian and Kazakh languages name the objects discussed in their conversations (languages) and provide speech coherence, being mainly conjunctions and prepositions.

A very little proportion (0.3%) of the words in the corpus are hybrid words combining elements from two languages, i.e. Russian roots and Kazakh affixes (underlined): *голды* /goldy/ 'his goal' (Possessive case, 3rd person singular), *видеода* /videoda/ 'in video' (Prepositional case, singular), *видеолар* /videolar/ 'video' (Nominative case, singular), *жанрын* /zhanryn/ 'genre' (Accusative case, singular), *алфавиті* /alfaviti/ 'its alphabet' (Possessive case, 3rd person singular), *отношение* /otnosheniye/ 'relationship' (Accusative case, singular), *мотивациялык* /motivatsiyalyk/ 'motivational' (Nominative case, singular). In terms of grammatical meaning, six of these hybrid Russian-Kazakh words are represented by nouns, while *мотивациялык* /motivatsiyalyk/ is represented by an adjective.

Students' conversations show frequent code-switching, involving all three languages at lexical and phrasal levels. The corpus revealed 198 instances where conversations switched from English, the primary language during group discussions, to Russian and Kazakh. In terms of code-switching types, intra-sentential switching was the most common, occurring 49.5% of the time toward Russian and 32.8% toward Kazakh. Inter-sentential code-switching appeared considerably less frequently – 7.6% for Russian and 6.6% for Kazakh. Additionally, 3.5% of cases involved hybrid words, which combine a Russian root and a Kazakh affix within a single word, representing intra-word code-switching (Stefanich et al., 2019). Figure 4 summarizes types of code-switching in the group discussions.

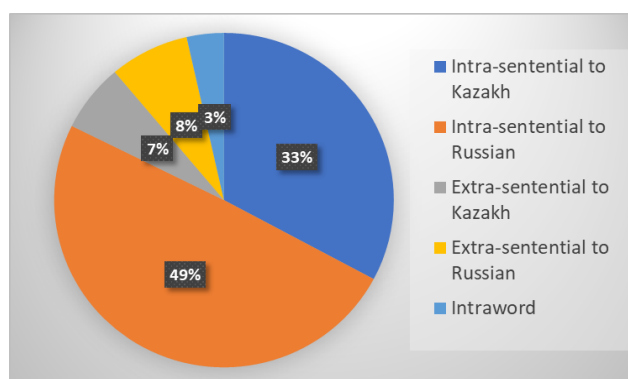


Figure 4. Distribution by Types of Code-Switching

The most common code-switching functions in the students' discussions are referential and discourse marker. The referential function is performed by switching to a different language due to lack of lexical knowledge or lexical equivalence (Hamdan, 2023). This can be demonstrated with examples (1-2) from the students' conversations, where a speaker, unable to remember the English terms for concepts like "window", "friends" and "text", resorts to using a word from Russian (R) or Kazakh (K) to more easily convey their meaning:

- (1) *Language is a* *окно* *into another world.*
 / Language is a okno into another world/
 'Language is a window (R) into another world.'
- (2) *But with my* *достарыммен,* *я обычно переписываюсь* *қазақша*
 / But with my dostarymmen ya obychno perepisyvayus' kazaksha/
 'But with my with my friends (K), I usually text (R)' in Kazakh (K)
- или по-русски.*
 / ili po-russki/
 'or in Russian (R).'

The discourse marker role of code-switching is the second function identified most frequently among students in their discussions. This feature is manifested through the use of linking words from Russian (*потому что* /potomu cho/ 'because', *и* /i/ 'and') and Kazakh (*себеби* /sebebi/ 'because', *және* /zhene/ 'and') within English conversations to establish cohesion or indicate a transition between ideas, which is demonstrated in the example below (3):

- (3) *Потому что* *it's my native language* *және* *мне так удобно.*
 / Potomu chto it's my native language zhene mne tak udobno/
 'Because (R) it's my native language and (K) for me it's so convenient (R).'

B. Survey Results

Table 2 displays the quantitative data provided in the students' responses to the closed-ended questions of the questionnaire. It offers insights into students' perceptions and self-reported practices regarding the use of the Kazakh, Russian and English languages in the English classroom within a multilingual educational context.

TABLE 2
USE OF MULTILINGUALISM IN THE ENGLISH CLASSROOM

Question	Response	Frequency
1. I often encounter the use of Kazakh, Russian and English languages in the same context in the field of education.	I strongly agree.	143 (32.1%)
	I agree.	216 (48.4%)
	I neither agree nor disagree.	52 (11.7%)
	I disagree.	31 (7%)
	I strongly disagree.	4 (0.9%)
2. The Kazakh language predominates in the educational process.	I strongly agree.	218 (48.9%)
	I agree.	175 (39.2%)
	I neither agree nor disagree.	36 (8.1%)
	I disagree.	15 (3.4%)
	I strongly disagree.	2 (0.4%)
3. The Russian language predominates in the educational process.	I strongly agree.	81 (18.2%)
	I agree.	225 (50.4%)
	I neither agree nor disagree.	68 (15.2%)
	I disagree.	66 (14.8%)
	I strongly disagree.	6 (1.3%)
4. The English language predominates in the educational process.	I strongly agree.	72 (16.1%)
	I agree.	177 (39.7%)
	I neither agree nor disagree.	94 (21.1%)
	I disagree.	93 (20.9%)
	I strongly disagree.	10 (2.2%)
5. All three languages interact harmoniously in the educational process.	I strongly agree.	137 (30.7%)
	I agree.	197 (44.2%)
	I neither agree nor disagree.	62 (13.9%)
	I disagree.	46 (10.3%)
	I strongly disagree.	4 (0.9%)
6. I often use all three languages in my learning.	I strongly agree.	101 (22.6%)
	I agree.	197 (44.2%)
	I neither agree nor disagree.	63 (14.1%)
	I disagree.	73 (16.4%)
	I strongly disagree.	12 (2.7%)

As seen from Table 2, a vast majority of respondents (80.5%) recognize the frequent presence of the three languages together in the educational process. Only a small number of students (7.9%) disagree, indicating a strong prevailing perception of active multilingual use within educational settings.

The next three questions deal with the predominance of each of the three languages under discussion. Respondents agree or strongly agree (88.1%) that Kazakh predominantly features in the educational process. Yet, opinions about Russian's dominance in education are less definitive and more nuanced. While 18.2% strongly agree and 50.4% agree (totaling 68.6% agreement) that Russian is predominant, a notable percentage remains neutral (15.2%) or disagrees (16.1%) with this view. This reflects a mixed perception where Russian plays a strong but perhaps not exclusive role. Furthermore, English is perceived as less dominant in the educational process compared to Kazakh and Russian. Only 16.1% strongly agree and 39.7% agree that English predominates, totaling 55.8%. A relatively large proportion (43%) disagree or are neutral, indicating that English is recognized as important but not overwhelmingly dominant.

The concept of Kazakh, Russian and English interacting harmoniously in the English classroom receives substantial support. About 30.7% strongly agree and 44.2% agree that the languages coexist effectively, totaling 74.9% positive responses. However, around 11.2% disagree, suggesting some challenges perceived in multilingual communication in the educational process. Regarding personal use of three languages in their learning, 22.6% of respondents strongly agree and 44.2% agree that they actively employ Kazakh, Russian and English. However, 19.1% show varying degrees of disagreement, indicating that some may rely on fewer languages or face constraints in multilingual interaction in the English classroom.

When asked to provide detailed comments on their answers to the previous questions, respondents explained how they view the actual distribution of languages in their learning process. Thus, many students state that the Kazakh language is dominant and gave reasons for its dominance: "The Kazakh language dominates, as it is understandable to everyone"; "I think that the Kazakh language dominates, as it is the state language and plays a key role in preserving the national culture"; "Today, the Kazakh language predominates in the humanities and classes that meet state standards. If the main teaching materials are presented in Kazakh, then the Kazakh language dominates"; "In the educational process, the main focus is on the Kazakh language, since it is the state language and plays a key role in the formation of national identity".

Other students gave an account of the use of the Russian and English languages in the educational process, which have large significance due to the following reasons: "Russian is widely used in teaching technical and scientific disciplines. English is actively introduced in universities and schools to prepare students for the international environment and modern requirements"; "If the training is related to scientific, technical or professional disciplines, then Russian or English are more often used. The reason for the dominance of the language is the availability of materials, the qualifications of teachers and the needs of the audience"; "During my studies, I consider Kazakh to be the main, native language. But Russian and English are also given a significant place. This is due to the fact that many necessary books, websites, programs are available in Russian and English"; "I believe that the Kazakh language plays a major role, but scientific literature is more often written in Russian"; "In my opinion, English prevails because currently in the field of education and science, English is mainly used, since it is a world language. It occupies an important place in educational systems, and most information comes from foreign sources; "At the moment, English is the dominant language in the educational process, as it is the most popular language and one can say it is used all over the world. That is why they try to focus on English in their studies".

In the second part of the survey, the focus was on how students perceive multilingualism in the educational process. Table 3 summarizes students' attitudes towards multilingualism in the English classroom, revealing key perspectives on language use and mixing in educational settings.

TABLE 3
STUDENTS' ATTITUDES TO MULTILINGUALISM IN THE ENGLISH CLASSROOM

Question	Response	Frequency
8. I believe that in the educational environment it is important for a student to be multilingual.	I strongly agree.	226 (50.7%)
	I agree.	180 (40.4%)
	I neither agree nor disagree.	21 (4.7%)
	I disagree.	16 (3.6%)
	I strongly disagree.	3 (0.7%)
9. I am convinced that it is natural for a multilingual person to mix languages in an educational context.	I strongly agree.	147 (33%)
	I agree.	207 (46.4%)
	I neither agree nor disagree.	57 (12.8%)
	I disagree.	30 (6.7%)
	I strongly disagree.	5 (1.1%)
10. I believe that a multilingual student should strive to use only one language in a given situation.	I strongly agree.	72 (16.1%)
	I agree.	124 (27.8%)
	I neither agree nor disagree.	106 (23.8%)
	I disagree.	131 (29.4%)
	I strongly disagree.	13 (2.9%)
11. I believe that a multilingual student strives to use different languages in the same situation.	I strongly agree.	92 (20.6%)
	I agree.	188 (42.2%)
	I neither agree nor disagree.	105 (23.5%)
	I disagree.	49 (11%)
	I strongly disagree.	12 (2.7%)
12. I like it when students speak only one language in class.	I strongly agree.	99 (22.2%)
	I agree.	175 (39.2%)
	I neither agree nor disagree.	79 (17.7%)
	I disagree.	89 (20%)
	I strongly disagree.	4 (0.9%)
13. I like it when students use all three languages simultaneously in the educational process.	I strongly agree.	110 (24.7%)
	I agree.	190 (42.6%)
	I neither agree nor disagree.	66 (14.8%)
	I disagree.	67 (15%)
	I strongly disagree.	13 (2.9%)

Table 3 shows that a strong majority of students recognize the value of multilingualism in the educational environment. Specifically, 50.7% of respondents strongly agree and 40.4% agree that being multilingual is important for students, totaling over 91% in agreement. Only a small fraction (4.3%) express disagreement or neutrality, indicating widespread appreciation for multilingual competence. Students largely view language mixing as a natural part of multilingual communication in their educational contexts. 33% strongly agree and 46.4% agree with this notion, together accounting for nearly 80% of positive judgement, whereas only a minority (7.8%) express disagreement. This suggests that code-switching is normalized and accepted by most students.

Attitudes are more divided concerning the idea that a multilingual student should use only one language at a time. Only 16.1% strongly agree and 27.8% agree (44% combined) with this viewpoint, whereas a larger portion (32.3%) disagrees and 23.8% remain neutral. This reflects mixed feelings about strict language separation versus flexible use. Similarly, opinions vary on whether multilingual students should tend to use several languages in the same context. 20.6% strongly agree and 42.2% agree (62.8% combined) that multilingualism should be present in the educational process, while 13.7% disagree and 23.5% are neutral.

Regarding preference for monolingual speech in the classroom, the responses show ambivalence. While 22.2% strongly agree and 39.2% agree (61.4% combined) that they like it when students speak only one language, a substantial minority (20.9% combined) are against this and 17.7% are undecided. This suggests that while monolingual use is favored by many, it is not overwhelmingly preferred. When it comes to using all three languages simultaneously in class, 24.7% strongly agree and 42.6% agree (67.3% combined) that they like this multilingual practice. However, 17.9% disagree and 14.8% are neutral, indicating some mixed feelings but generally positive attitudes toward integrated use of multiple languages.

The students' detailed answers to the last question reflect different positions regarding the use of multilingualism in the educational process. Thus, some students express their rejection of multilingualism, since, in their opinion, the simultaneous use of three languages can interfere with the assimilation of the material and create additional difficulties: "Using different languages at the same time interferes with understanding the educational material"; "Using several languages at the same time in teaching can cause confusion and reduce concentration, but if properly organized, it helps develop flexibility of thinking and language skills"; "This can create difficulties in learning and make it difficult to assimilate the material, especially if students do not have a good command of all three languages"; "Using one language in teaching makes the process more understandable and structured. Constantly switching between three languages can cause confusion and make it difficult to assimilate the material".

On the other hand, respondents emphasize the need to study Russian and English to develop intercultural competence: "In my opinion, the Kazakh language dominates the educational process as the state language, while Russian and English complement it, playing an important role in various fields of knowledge and international communication"; "In my opinion, multilingual students, having several languages, naturally use them depending on the situation. This

facilitates their communication and helps them be effective in various cultural contexts”; “The use of all three languages by the teacher makes the material more accessible to students with different language backgrounds. This helps to better understand complex topics, especially when there is a need to translate terms or explain complex concepts. This approach contributes to the formation of multilingual competence and broadens horizons”; “I like the use of three languages, because it helps to better understand the material, develops thinking and prepares for life in a multilingual environment”.

Some survey responses emphasize multilingualism’s value in education for enhancing cognitive flexibility, cultural awareness and global communication. Using Kazakh, Russian and English enriches access to knowledge and fosters multitasking skills, supporting students’ national identity and global competitiveness by connecting them to diverse academic and professional opportunities: “This is truly valuable because using three languages simultaneously develops flexibility of thinking, helps to better understand culture and interact effectively in a global environment. This approach makes education more diverse and modern”; “Using three languages in teaching gives students access to more sources of information and helps to develop flexibility of thinking. For example, the Kazakh language strengthens national identity, Russian provides access to literature and knowledge, and English opens the door to world science and technology”; “Using all three languages in the educational process helps students develop multitasking skills, improve communication and have access to world knowledge, while maintaining national identity”; “Trilingualism allows access to a wider range of knowledge: the Kazakh language strengthens the connection with national culture, Russian opens access to extensive scientific and literary resources, and English ensures integration into the international scientific and professional community. This approach helps students become competitive and successful both nationally and globally”.

IV. DISCUSSION

In relation to the findings of our study, we find it necessary to discuss the following issues. A similar investigation into students’ language practices, highlighting alternation between Kazakh, Russian and English as natural communication strategies, was performed by Kurmanova et al. (2023). The main difference is that their study focused on students’ spontaneous conversations beyond the classroom, in an unofficial setting. This difference in situations results in significant differences in the findings obtained. Thus, in students’ spontaneous informal conversations, Kazakh typically serves as the matrix language, with elements of Russian and English incorporated into it. However, in our analysis of group discussions during English classes, English functions as the matrix language, with insertions from Russian and Kazakh included.

The next significant difference concerns the functions of language alternation in students’ conversations. Kurmanova et al. (2023) identified referential, expressive functions as well as structural roles such structural parallelism and grammatical fusion. In our research corpus of students’ formal interactions, the main functions are referential and discourse maker. We, similarly, identified some instances of grammatical fusion in students’ group discussions, but they show less diversity in word patterning. Unlike three types of grammatical fusion identified by Kurmanova et al. (2023), all instances of grammatical fusion in our corpus follow the same pattern, being based on Russian/Kazakh alterations where Kazakh acts as a structural “frame” for Russian-language borrowings. Still, this finding is in contrast with the claim made by Zharkynbekova and Chernyavskaya (2022) that the main pattern of bilingual practices in Kazakhstan is based on the combination of Kazakh roots and Russian affixes, where Russian serves a structural “frame”.

The presence of grammatical fusion in our corpus can be related to the concept of intra-word code-switching, when multilingual speakers switch between morphemes from different languages in the same word (Sabty et al., 2021). Despite being rejected by some scholars (Poplack, 1980; MacSwan & Colina, 2014), intra-word code-switching has been documented in recent research into a number of language pairs including English/Norwegian (Alexiadou et al., 2015), Greek/German (Alexiadou, 2017), English/Russian (Gritsenko & Laletina, 2016; Gritsenko & Aleshinskaya, 2023), English/Kazakh, Russian/Kazakh (Kurmanova et al., 2023) and Kazak/Russian (Zharkynbekova & Chernyavskaya, 2022). Based on these findings, it is evident that morphological elements can be systematically combined within a single word, similar to how code-switching occurs at the sentence or discourse level (Stefanich et al., 2019).

This type of word formation can also be related to the concept of translanguaging, which highlights the dynamic and creative use of multilingual resources within social and cognitive contexts (Li, 2016, 2018). Unlike code-switching or code-mixing research, which typically examines how syntactic and morphological features are utilized in language mixing (Dahmen, 2022), studies of translanguaging practices focus on the functional and pragmatic dimensions of the language blending process (Munirah et al., 2021). Translanguaging practices serve as a flexible tool for fostering mutual understanding and facilitating harmonious communication in students’ multilingual interactions.

Finally, the findings from actual students’ formal discussions in the English classroom may suggest the development of uneven multilingualism (Ringe, 2022) or linguistic inequality (Nhongo & Siziba, 2022), when one language predominates in communication and the other two are given less attention. In a country whose main languages are traditionally Kazakh and Russian (Zharkynbekova & Chernyavskaya, 2022), English is only starting to gain significance due to the governmental support. The state language policy intersects with the widely acknowledged role of the English language as a symbol of professionalism (Aleshinskaya, 2020), global connection (Utegenova et al., 2024; Abdullina et al., 2022) and a gateway to global educational integration (Vasilieva & Aleshinskaya, 2024). This can be

also evidenced by some responses in our survey highlighting the growing importance of the English language for global integration.

V. CONCLUSION

This study aimed at exploring forms of multilingualism in a formal classroom context, highlighting the relevant use of these languages and forms of multilingualism. The findings of the qualitative and quantitative analyses of students' multilingual discussions in the English classroom highlight a dynamic and integrated use of English, Russian and Kazakh, with English predominating alongside significant contributions from Russian and Kazakh. The study indicates that Kazakhstan's students engage in rich multilingual practices that encompass three languages as well as various forms of code-switching (intra-sentential, extra-sentential, intra-word) for a variety of purposes (reference, discourse marker, structural), shaped by educational contexts and broader sociolinguistic realities. The findings of the survey point at harmonious interaction among the three languages and confirm frequent multilingual use, highlighting the dynamic and integrated nature of language use in the educational environment of modern Kazakhstan. While there is some division on whether students should stick to one language per situation, the tendency to use multiple languages is acknowledged and often appreciated. These findings emphasize the fluid multilingual competence of students, enabling flexible and contextually adapted communication. The study contributes empirical insights essential for language policy, pedagogy and sociolinguistic theory in multilingual post-Soviet contexts.

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Blended Learning in Under-Resourced Contexts: Insights From Chinese EFL Students in a Local College Context

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Abstract—As blended learning has become prevalent in higher education, particularly in English as a Foreign Language (EFL) instruction, there remains a lack of empirical research focusing on perspectives and experiences of students in under-resourced and underrepresented contexts. This research examines EFL students' perceptions of blended learning in a Chinese local college, where technological integration and instructional innovation often face contextual challenges. Using a mixed-methods approach, the study surveyed 230 undergraduate students and conducted in-depth interviews with 16 participants to explore their attitudes, readiness, and competence as blended learning users, as well as their perceptions of instructional design, learning technologies, and teacher feedback in blended EFL courses. The findings reveal that while students generally had favorable views of blended learning, they also encountered significant challenges including heavy workloads, weak self-regulation, technological barriers, and limited theoretical knowledge of blended learning. The research highlights the importance of instructional support, teacher training, infrastructure development, and pedagogical balance to optimize the implementation of blended learning in EFL contexts. Implications are offered for teachers, administrators, and policymakers aiming to enhance blended learning effectiveness, particularly in local and resource-constrained college settings.

Index Terms—blended learning, EFL, language teaching, language learning, student perceptions, Chinese local college

I. INTRODUCTION

Since online learning became the primary mode of education during the COVID-19 pandemic, there has been a growing shift towards blended learning approach, or the idea of integrating online and offline instruction (Wu & Luo, 2022). Blended learning approach has gained popularity among both teachers and students, particularly in English as a Foreign Language (EFL) education (Horn & Staker, 2017). In Chinese colleges, blended learning has also been widely adopted to enhance EFL instruction by combining the strengths of both online and offline learning modes. Blended learning addresses various EFL educational challenges in China, such as increased language learning demands and limited classroom time by offering flexible, resource-rich online learning tailored to individual needs (Li et al., 2019). At the same time, it preserves the benefits of face-to-face interaction and timely teacher feedback, fostering deeper learning and supporting students' socio-emotional development (Shoukat et al., 2024).

The implementation of blended learning approach across Chinese higher education institutions varies significantly in both scope and quality, largely due to contextual factors such as geographic location and resource availability. However, most studies focused on blended learning implementation in colleges in central or metropolitan regions, examining areas such as the effectiveness of blended learning in foreign language education, factors influencing student performance, and the limitations of blended learning environments in China (Jiang, 2022; Wang & Zhang, 2022; Yang et al., 2023). Relatively little attention has been given to local or regional colleges. Due to remote locality and unbalanced financial support, the local colleges adopted the blended learning model much later than the metropolitan counterparts, and there are much more challenges and difficulties for the local college teachers to integrate technology with EFL learning (Luo, 2022). This delayed adoption and the resulting challenges may explain the scarcity of research on blended learning in local college contexts.

Given the importance of understanding blended learning in under-researched settings, this research seeks to address this gap by exploring the perceptions of Chinese students at a local college toward blended EFL learning, including their perceptions of themselves as blended learning users and perceptions of other dimensions underlining blended learning.

II. LITERATURE REVIEW

A. Blended Learning Models in Language Education

Blended learning, as an approach in second and a foreign language education, has been defined in various ways. However, most scholars view that it must involve the strategic integration of face-to-face classroom instruction with online learning activities to combine the strengths of both modalities. The primary aim is to maximize resource utilization and enhance instructional effectiveness (Cronje, 2020; Garrison & Kanuka, 2004). Various models of blended learning have also been developed based on different criteria, such as the degree of online integration, student autonomy, and instructional design. In recent development, Horn and Staker (2017) proposed four main models of blended learning which are: rotation model, flex model, a la carte model, and enriched virtual model. These models have been applied across diverse educational contexts, including language education, and provide frameworks for designing blended learning environments. Among these, the *rotation model* is the most commonly implement in schools worldwide (Ashraf et al., 2022). The rotation model comprises four distinct sub-models, as outlined in Table 1 below, to support flexible movement through various instructional formats, including whole-class activities, small group work, individual lessons, and online tasks, which is believed to enhance learner engagement in language learning.

TABLE 1
BLENDED LEARNING MODEL

Rotation model: Learners rotate between working face-to-face with a teacher and online instruction based on a teacher-created schedule (Horn & Staker, 2017)	
A. Station Rotation	Students rotate between classroom activities, based on a designated time block, and online learning activities.
B. Lab Rotation	Students rotate between classrooms and computer labs, where they engage in online-learning activities.
C. Flipped Classroom	Students receive initial instruction through videos or online content outside the classroom (typically at home), and then engage in application tasks, collaboration, or extended learning during face-to-face class time.
D. Individual Rotation	Each student follows customized learning path based on individual own learning goals. They do not rotate but learn through personalized learning modes.

B. Advantages of Blended Learning

Blended learning offers a feasible solution to the limitations of both fully online and traditional classroom instruction by combining the strengths of each approach (Medina, 2018). Previous studies have highlighted its high flexibility as a key advantage—allowing teachers and learners to decide when, where, how learning takes place, and to select instructional designs and resources accordingly (Shoukat et al., 2024; Stap et al., 2024). Another major benefit is the vast amount of language input accessible through digital resources outside the classroom (Namyssova et al., 2019). Previous study findings have revealed that learners were generally satisfied with the blended approach of combining face-to-face teaching and online learning, and that blended learning could motivate students to engage in the language learning and interact more with teachers and peers on the learning system (Wong & Hwang, 2020). Blended learning has also been shown to enhance learner autonomy by promoting responsibility and self-directed learning (Banditvilai, 2016). In terms of skill development, research has found improvements in reading proficiency (Albiladi & Alshareef, 2019), as well as grammar, spelling, and writing skills (Ashraf et al., 2022).

In China, most studies have shown that EFL educators, especially those in top-tier universities, have implemented blended learning using the rotation model to teach EFL and to manage large class size (Wang et al., 2024; Yang et al., 2017). The implementation of blended learning emphasized student-centered learning, allowing learners to progress at their own pace and providing more opportunities for interaction in both online and face-to-face settings. In addition, the use of digital platforms supported formative assessment through built-in evaluation tools. However, the findings of blended learning implementation in China presented in the existing studies derived mostly from the investigation of top-tier universities in central areas, with limited evidence on how blended learning is implemented or perceived in local colleges.

C. Students' Perceptions of Blended Learning

Research on students' perceptions of blended learning consistently highlights its key advantages, such as its flexibility and rich resources. Moreover, students perceived the benefits of formative assessment and timely individual guidance and feedback in the blended learning (Sun & Qiu, 2017). However, many studies also identified challenges, particularly related to the online component. These include poorly designed instructional frameworks (Ashraf et al., 2022), a lack of digital literacy, and insufficient training for students to effectively navigate blended learning environments (Wang, 2021). Studies from Chinese scholars found similar results. While students generally express positive attitudes toward using mobile devices for language learning and are satisfied with the outcomes of blended learning, concerns remain regarding their capacity for self-regulated learning and the burden of excessive online tasks (Guo et al., 2020; Wu & Luo, 2022).

Recent studies also suggest a positive correlation between students' perception of blended learning and their willingness and readiness to adopt it in their learning. They reveal that today's college students tend to have positive

views toward technology in learning, they are quite digitally literate and internet-savvy, with high levels of e-learning readiness and frequent technology use (Osman et al., 2017; Pregoner & Bagoio, 2024; Rashid et al., 2021).

In China, previous studies on the implementation of blended learning have also revealed that students are generally capable of adapting to this mode of learning, particularly those in top-tier universities located in central regions. However, few studies have explored the perspectives of EFL students in local colleges, despite their need to adjust to blended learning environments as well. This research, therefore, aims to fill this gap by examining the perceptions of EFL students in a local Chinese college where blended learning has been implemented. It explores students' perceptions of various dimensions of blended learning, as well as their self-perceptions as users of this approach—an area often overlooked in previous studies. Understanding how students view their roles and abilities in a blended environment is essential for designing more inclusive, supportive, and effective learning models tailored to diverse educational contexts.

III. METHODOLOGY

This study employs a mixed-methods approach, using questionnaires and focus group interviews to explore students' perceptions of blended learning. Details of the instruments, data collection procedures, and data analysis are described below.

A. Participants

A purposive sampling method was used to select 230 non-English major EFL students enrolled in an English course at a local Chinese college. Additionally, 16 students voluntarily participated in four focus group interviews.

B. Data Collection

The data were collected using two instruments: students' questionnaires and focus group interviews. The questionnaire was administered via an online survey platform. It was comprised of two sections. The first section collected demographic information (e.g., gender, age, major, and duration of English learning). The second section included items covering five dimensions—learner, instructor, course, design, and technology—using a 5-point Likert scale (from *Strongly Disagree* to *Strongly Agree*). The questionnaire items were developed based on the review of relevant literature and previous studies (Ashraf et al., 2022; Osman & Hamzah, 2017; Wu & Luo, 2022; Yang et al., 2017), and were validated through expert review and a pilot test. Figure 1 illustrates the framework of these blended learning dimensions and the corresponding survey items.

Students' perceptions of themselves as blended learning users (e.g., willingness, readiness, and competence), and the other dimensions of blended learning, including their experiences of blended learning, instructional interaction, course structure, and the use of the learning management system (LMS), were further explored in more depth through the focus group interviews.

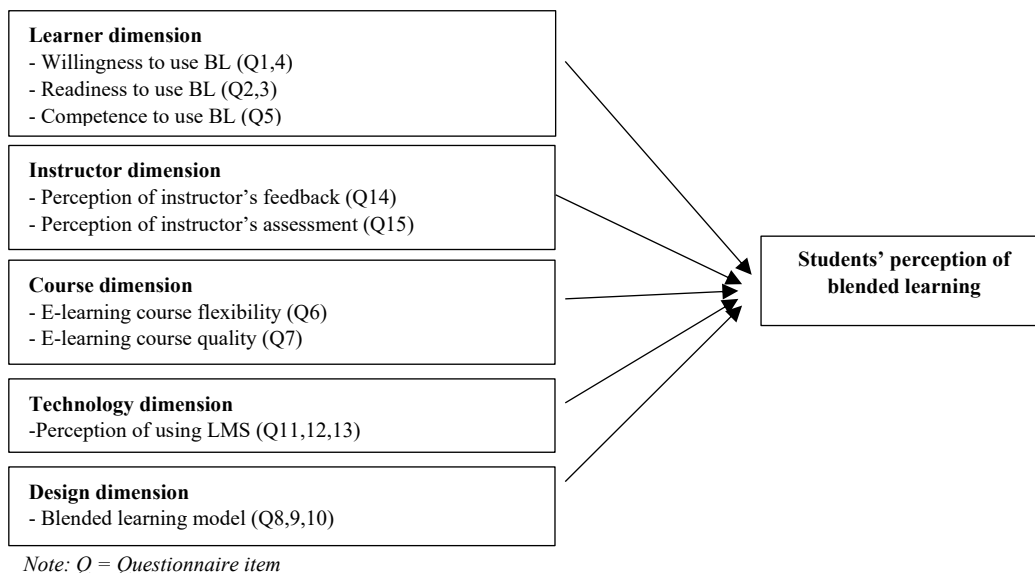


Figure 1. Dimensions of Blended Learning

C. Data Analysis

Quantitative data from questionnaires were analyzed using descriptive statistics, i.e. means (*M*) and standard deviations (*SD*). The interview data were analyzed using constant comparative analysis method (Merriam & Tisdell, 2015), which involves comparing one segment of data with another to identify similar responses. The data were then further analyzed, grouped into smaller topics, and organized into categories based on recurring themes.

IV. RESULTS

This section presents Chinese EFL students' perceptions of various dimensions of blended learning and its implementation. These dimensions include perceptions of themselves as users, as well as perceptions of the instructor, course, design, and technology.

A. Perceptions of Themselves as Blended Learning Users

Table 2 summarizes students' self-perceptions of their willingness, readiness, and competence in using blended learning.

TABLE 2
STUDENTS' PERCEPTIONS OF THEMSELVES AS BLENDED LEARNING USERS

Survey questions	N	Mean	SD
1. I prefer blended learning to traditional language learning method, since I am more engaged in blended learning and improve my language learning output.	230	4.28	.637
2. I have sufficient general knowledge of blended learning.	230	4.16	.984
3. I have sufficient knowledge about the theories of blended learning.	230	3.47	.992
4. I suffer a lot from pressure of blended learning in my college English, such as more work, and time commitment.	230	3.31	1.077
5. I am competent in using the learning management system.	230	3.96	.881

Most students preferred blended learning over traditional methods of EFL learning ($M = 4.28$, $SD = 0.637$). Regarding students' readiness to use blended learning, they reported having more general knowledge of blended learning ($M = 4.16$, $SD = 0.984$) than knowledge of its theoretical foundations ($M = 3.47$, $SD = 0.992$).

Interview data also reveal that most students were more engaged in the blended learning, and their language learning has been improved through this method. Those who were satisfied with blended learning noted that blended learning combined the strengths of face-to-face learning and online learning, with the flexible online learning and regular offline learning. Students reported that blended learning fostered greater motivation by offering learning materials for continuous and independent language practice, which greatly improved their language proficiency. One student reflected, *"The more I practice online, the more confident and proficient I become in my classroom presentations"*.

Despite practical competence in using the LMS ($M = 3.96$, $SD = 0.881$), many students admitted lacking knowledge of blended learning theories and showed limited interest in acquiring it. As one student noted, *"I don't think it is difficult to use the learning platforms or locate useful resources. However, I have little knowledge of the theories relevant to blended learning, since my English teacher have never told us anything about that and I have no intention to study more because I don't think it is necessary"*.

Finally, students also acknowledged challenges, particularly the increased workload and time required ($M = 3.31$, $SD = 1.077$). Some students described feeling overwhelmed by assignments and the difficulty of maintaining self-discipline during autonomous learning. The students with weak self-regulation found autonomous online learning challenging, because they were distracted by the games or videos on the internet. Technical issues, such as unstable internet connections, also contributed to their stress, as one student commented that *"Our English teacher gave us too much online learning assignments every week, ... These work occupied extra time and made me overwhelmed and frustrated"*.

B. Perceptions of the Instructor Dimension

Students' perceptions of instructor practices in blended learning are presented in Table 3 below.

TABLE 3
STUDENTS' PERCEPTIONS OF THE INSTRUCTOR DIMENSION

Survey questions	N	Mean	SD
14. In my English class, teacher uses technology to provide feedback on our work.	230	4.20	.740
15. In my English class, teacher uses multiple assessment methods to evaluate our learning.	230	4.30	.627

As shown in Table 3, students appreciated teachers' use of technology for feedback ($M = 4.20$, $SD = 0.740$) and favored diverse assessment methods ($M = 4.30$, $SD = 0.627$). Interview data also confirmed that they believed teachers provided immediate feedback on their classroom activities and used the LMS to provide prompt feedback for students online learning. However, due to the asynchronous and flexible nature of blended learning, it could be challenging for teachers to offer prompt feedback on the LMS, though teachers managed hard to assist students with their learning, as one student said, *"The LMS has the function of providing automatic revisions. But, when I text my teacher on the LMS, it usually takes a week or two to get responses from my teacher. I know teachers are always too busy to provide instant feedback on the LMS"*.

Moreover, most students valued multiple assessment methods, which motivated them to engage in both online and offline learning. However, some questioned the fairness of relying solely on LMS logs for online assessment. As one student pointed out, *"Our online learning performances were mainly assessed based on the online learning logs on*

learning system, such as how much time we spent on watching videos, etc. But some of my classmates just let the video play without learning...So, I think teachers should design various forms of online learning tasks rather than merely video watching, to make students' online learning assessment becomes more systematic and fairer".

Overall, students appreciated multiple assessment methods and timely feedback and emphasized the importance of effective management of blended learning by the teachers.

C. Perceptions of the Course Dimension

Students highly perceived the flexibility of blended learning and the abundance of online learning resources, as the results presented in Table 4 below.

TABLE 4
STUDENTS' PERCEPTIONS OF THE COURSE DIMENSION

Survey questions	N	Mean	S. D
6. Online learning gives me more flexibility because I can control the pace of my learning.	230	3.73	1.004
7. My teacher provides us with a lot of learning resources, which helps me become more active and productive in the learning.	230	3.66	.944

As shown in Table 4, students acknowledged that online learning offered flexibility ($M = 3.73$, $SD = 1.004$) and access to abundant learning materials ($M = 3.66$, $SD = 0.944$). Interview data also highlighted that flexibility allowed better time and place management. Moreover, blended learning was also valued for its ability to provide a wide range of supplementary learning resources beyond the confines of textbooks and classroom instruction. For instance, students mentioned integrating SPOCs in courses provided them with a better way to gain knowledge from multiple sources, such as videos, articles, and web links. One student remarked on this point that *"The advantage of blended learning is the richness of materials available on the platform...These materials do broaden our knowledge about western culture, such as American election. I think they are the perfect complement for the textbook content"*.

However, one student in the interview pointed out that, although online learning allowed students to carry out learning according to their own time and pace, it was challenging for him to follow his time schedule. This implies that students with weak time-management ability struggled to maintain consistent learning habits, questioning the effectiveness of online learning for less self-disciplined learners.

D. Perceptions of the Technology Dimension

Table 5 presents students' perceptions of the technology aspect of blended learning.

TABLE 5
STUDENTS' PERCEPTIONS OF THE TECHNOLOGY DIMENSION

Survey questions	N	Mean	S. D
11. I have sufficient opportunities to interact with my peers and teacher during both online and face-to-face components of the course.	230	4.57	.504
12. Teacher uses LMS to promote my collaboration in learning.	230	4.00	.779
13. Teacher uses LMS to encourage my autonomous learning.	230	4.09	.805

As shown in Table 5, students reported that learning system provided them with more opportunities for interactions ($M = 4.57$, $SD = 0.504$). They also noted that the LMS supported both autonomous ($M = 4.09$, $SD = 0.805$) and collaborative learning ($M = 4.00$, $SD = 0.779$).

College students were born in the information era; therefore, most students reported high level of digital proficiency, especially their competence in using LMS and locating learning resources. As one student remarked, *"I think I'm competent enough. I know how to use basic tools like discussion boards, online quizzes, and video lectures. I've also got better at finding additional resources online, like English podcasts and articles, to supplement my learning."* Yet, one respondent, coming from under-resourced backgrounds showed moderate technological competence, facing difficulties keeping up with her classmates in using technology in the blended learning.

Students also perceived blended learning offered more chances for interaction among students and teachers. The LMS provides options for connecting and interacting with their peers and teachers through discussion forums. They were even more active in sharing opinions on the online forums than in the classroom discussions, as one student noted, *"We prefer to share our ideas behind the screen rather than in class...Maybe because Chinese people have the tradition of being introverted. Another reason for the silence in classroom is the poor oral English for most Chinese students"*.

In relation to technology accessibility, while the LMS facilitated flexibility and resource access, some students admitted to misusing the system — e.g., skipping videos — and noted unequal participation in group tasks. Additionally, high mobile internet fees and poor campus connectivity were common complaints. One student remarked, *"Every week, having to finish the tasks on the LMS, I have mobile phone apps which are accessible whenever, wherever. It's convenient but the problem is that internet on campus does not always work well. During some peak hours, the internet speed is rather slow, and I must wait for some time"*.

E. Perceptions of the Design Dimension

Students' perceptions of the blended learning design are shown in Table 6 below.

TABLE 6
STUDENTS' PERCEPTIONS OF THE DESIGN DIMENSION

Survey questions	N	Mean	SD
8. In my English class, my teacher used the flipped classroom learning methods. I learn at my own pace by completing online learning assignments, and during the face-to-face time onsite, the teacher answers questions and fosters discussion.	230	3.35	.894
9. In my English class, I meet face-to-face with the teacher on a regular basis and complete my coursework via computer from remote locations.	230	4.19	.954
10. In my English class, teacher uses SPOC-based learning model.	230	4.06	.899

Table 6 reveals that blended learning as the combination of regular face-to-face learning and flexible online learning was also agreed on by most students ($M = 4.19$, $SD = 0.954$), and the SPOC-based learning model was perceived very positively as a model adopted by their English language teacher ($M = 4.06$, $SD = 0.899$).

Findings from the interviews evidenced that most students recognized the implementations of SPOC platforms, such as *Superstar Learning System*, *U Campus Learning System*, and *WeLearn System* in supplementing classroom instruction. Learning materials and resources were provided on these learning systems for students autonomous learning based on their teachers' schedules, while students attended classroom learning at a regular time. One student reported, "*In my English course, we used the Superstar Learning System for facilitating our English learning...The learning system also provided greater opportunities for interaction between students and teachers*".

Students generally appreciated the balance of online and offline learning tailored by their teachers. However, lower-level language proficiency students experienced their teachers using offline-dominant blended learning approach, in which teaching materials were administered in the classroom and online learning served as the supporting role. In contrast, higher-level language proficiency students expected more time on flexible learning, with the classroom learning for discussions, and student presentations. Nevertheless, they commented that while the model promoted deeper engagement in learning, it is also challenging, and it required significant self-discipline and time outside of class.

V. DISCUSSION

This study provides important insights into how Chinese EFL students perceive blended learning in a local college context. Consistent with prior research (Osman et al., 2017; Pregoner & Baguio, 2024; Rashid et al., 2021), students expressed strong willingness and generally positive attitudes toward blended learning. They particularly valued the flexibility and abundance of online resources. These affordances enabled students to learn at their own pace and broaden their exposure to language input, thereby enhancing motivation and language outcomes (Ashraf et al., 2022; Banditvilai, 2016; Wong & Hwang, 2020).

Despite these perceived benefits, students also reported significant challenges in blended learning. While they thought they were competent in using the LMS, their understanding of the underlying pedagogical principle of blended learning remained limited. This lack of theoretical and strategic knowledge, combined with extra online workload, weak self-regulation, and technical issues undermined their overall learning experience of blended learning. Such findings align with earlier studies highlighting similar constraints in blended learning environments in under-resourced Chinese EFL classroom context (Wu & Luo, 2022; Guo et al., 2020; Wang, 2021).

Furthermore, students emphasized the importance of timely feedback and diverse assessment methods adopted by teachers. They pointed out that while the LMS facilitated prompt feedback in online learning, they still preferred more detailed and constructive input from teachers. This highlights a key challenge for teachers to balance between timeliness and quality of feedback (Wu & Luo, 2022; Sun & Qiu, 2017) when blending in online learning. Moreover, students' concerns about fairness in online assessment, particularly the over-reliance on LMS logs, underscores the need for more systematic and varied learning assessment strategies.

Another key finding relates to increased interaction. Students valued the increased opportunities for collaboration and communication with peers and teachers afforded by blended learning, which fostered a sense of community and engagement (Wang et al., 2024; Shoukat et al., 2024). However, the problems concerning misuse of the system reported by students, such as skipping videos on the LMS, unequal participation in group tasks, and being more interactive online but more reticent in classroom activities, highlight the importance of students' training and balancing online and face-to-face modalities to ensure meaningful engagement.

Finally, regarding instructional design, *the station rotation model* was more commonly adopted in language teaching in the local college, where students regularly met teachers in the classroom and completed online coursework on a small private online course (SPOC). This SPOC-based rotation model has also been used in some prominent universities in China (Wang et al., 2024; Yang et al., 2017). While this model provided a structured balance between online and offline learning, students' preferences varied according to their language proficiency levels. Less proficient learners preferred

more teacher-led, offline-dominant approaches, while higher-level students favored flipped classroom models that encouraged autonomy and deeper engagement. These findings underscore the need for differentiated blended learning designs that align with students' proficiency, motivation, and self-regulation capacities.

VI. CONCLUSIONS AND IMPLICATIONS

Blended learning has become a growing focus in EFL education, yet few studies have examined students' perceptions particularly in local Chinese colleges. This study highlighted three main insights into students' views on blended learning: (1) students expressed positive attitudes and practical readiness, demonstrating greater understanding of technical aspects than of underlying pedagogical principles; (2) they valued the flexibility, abundant resources, interaction, and diverse assessment afforded by blended learning; and (3) they also faced challenges, including heavy workload, weak self-regulation, and technical barriers.

The study offers implications for multiple stakeholders. It suggests that *EFL teachers* should provide training, beginning with explicit elements about blended learning and moving toward a fuller understanding of pedagogical principles. Teachers should also develop robust supervision mechanisms, ensure regular, timely, and meaningful feedback, and employ multiple assessments to monitor learners' progress in both online and offline learning. *Students*, placed at the center of the learning process, are expected to be more active and self-directed participants, developing a strong sense of self-discipline and effective time-management skills. *Institutions*, particularly in under-resourced contexts, have a responsibility to invest in essential infrastructure, such as high-speed internet, functional learning management systems, and well-equipped computer labs or digital learning spaces, as well as to provide training and support programs for both teachers and students to facilitate blended learning adoption.

While the study provides valuable insights, its limitations should also be acknowledged. First, as the findings are based on data from a single local college, they cannot be generalized to all EFL contexts in China, though they may be transferable to other institutions with similar characteristics. Furthermore, as perceptions are dynamic and shaped by experience (Démuth, 2013), longitudinal studies are needed to explore how students' attitudes toward blended learning evolve over time. For future studies, they could compare different types of institutions to better understand how contextual factors influence blended learning in practice. Additionally, adopting experimental designs could help examine the interplay of pedagogy, institutional support, and learner factors. Such inquiries will be critical to advancing theory and practice and to realizing the transformative potential of blended learning in Chinese EFL education and beyond.

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Call for Papers and Special Issue Proposals

Aims and Scope

Theory and Practice in Language Studies (TPLS) is a peer-reviewed international journal dedicated to promoting scholarly exchange among teachers and researchers in the field of language studies. The journal is published monthly.

TPLS carries original, full-length articles and short research notes that reflect the latest developments and advances in both theoretical and practical aspects of language teaching and learning. We particularly encourage articles that share an interdisciplinary orientation, articles that bridge the gap between theory and practice, and articles in new and emerging areas of research that reflect the challenges faced today.

Areas of interest include: language education, language teaching methodologies, language acquisition, bilingualism, literacy, language representation, language assessment, language education policies, applied linguistics, as well as language studies and other related disciplines: psychology, linguistics, pragmatics, cognitive science, neuroscience, ethnography, sociolinguistics, sociology, and anthropology, literature, phonetics, phonology, and morphology.

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Special issues feature specifically aimed and targeted topics of interest contributed by authors responding to a particular Call for Papers or by invitation, edited by guest editor(s). We encourage you to submit proposals for creating special issues in areas that are of interest to the Journal. Preference will be given to proposals that cover some unique aspect of the technology and ones that include subjects that are timely and useful to the readers of the Journal. A Special Issue is typically made of 15 to 30 papers, with each paper 8 to 12 pages of length.

A special issue can also be proposed for selected top papers of a conference/workshop. In this case, the special issue is usually released in association with the committee members of the conference/workshop like general chairs and/or program chairs who are appointed as the Guest Editors of the Special Issue.

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- Name, contact, position, affiliation, and biography of the Guest Editor(s)
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- Estimated number of papers to accept to the special issue
- Tentative time-table for the call for papers and reviews, including
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 - Notification of acceptance
 - Final submission due
 - Time to deliver final package to the publisher

If the proposal is for selected papers of a conference/workshop, the following information should be included as part of the proposal as well:

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