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Foreword

This issue of the International Journal on Culture, History, and Religion (IJCHR) brings together a rich tapestry of scholarship that reflects the intricate and often overlapping themes of cultural identity, spirituality, tradition, postcolonial critique, and innovation in the contemporary world. The articles in this volume examine how societies negotiate the preservation of heritage while adapting to modern challenges, particularly in education, healthcare, language, gender, governance, and the arts.

One central theme that emerges is the vital role of tradition as a living force, from the use of the Indonesian game Dakon as a pedagogical tool for foreign learners, to the Blaan tribe's culturally grounded response to the COVID-19 crisis in Southern Mindanao. These studies showcase how traditional knowledge systems and practices continue to shape collective well-being, resilience, and identity.

Language and religious expression are other recurring threads, especially in Southeast Asia. In the context of the sacred, articles on Javanese sociopragmatics and Filipino personalism interrogate how cultural and religious values are encoded and transmitted through speech, rituals, and everyday communication. Similarly, the testimonial literature and postmodern metafiction analysis reveal how narratives become acts of memory and resistance, particularly in postcolonial and diasporic contexts.

In response to globalization, contributors examine the transformation of cultural institutions and identities, from Indian diaspora diplomacy in Indonesia to the urbanization of Ukrainian culture, highlighting both opportunities and tensions in preserving cultural integrity amid rapid societal change. The issue also engages with digital innovation, exploring how art and cultural management must evolve in an increasingly interconnected and data-driven world.

The theme of education as a site of cultural negotiation is powerfully present. Several articles call for decolonizing curricula, integrating indigenous perspectives, and reevaluating the role of cultural storytelling in higher education and heritage promotion. These contributions collectively argue for education that honors context, diversity and lived experience.

Finally, through explorations of health, gender, and climate consciousness, this volume reminds us that cultural research is not confined to the abstract. It has deep implications for policy, social equity, and sustainability, revealing how culture is a foundation for justice, care, and community.

Taken together, the articles in this issue represent a growing movement toward scholarly inquiry that is grounded, inclusive, and critically engaged. We hope readers find in these pages both a mirror of our complex realities and a window into meaningful possibilities for cultural dialogue and transformation.

Renniel Jayson Jacinto Rosales, MATh, PhD Cand.
Managing Editor

Message from the Editor

It is with great honor that I present the June 2025 issue of the International Journal of Culture, History, and Religion (IJCHR), a scholarly platform devoted to critically exploring and disseminating knowledge across the intersecting fields of cultural studies, historical inquiry, and religious thought.

In an age marked by both cultural convergence and fragmentation, the role of research in understanding the intricacies of identity, heritage, belief systems, and historical processes has never been more essential. IJCHR remains committed to publishing high-quality, peer-reviewed research that advances theoretical knowledge and contributes to practical insights applicable to policy, education, interfaith dialogue, and cross-cultural collaboration.

Our journal invites scholars, historians, cultural analysts, religious practitioners, educators, and policymakers to engage with our platform. We encourage submissions that examine lived traditions, indigenous epistemologies, historiographical debates, cultural transitions, faith-based practices, and the ethical intersections between the sacred and the secular. Whether rooted in empirical research, philosophical critique, or comparative analysis, every article we publish seeks to challenge, inform, and expand the global discourse.

This issue features diverse contributions, from analyses of ritual symbolism and contested histories to studies on the resilience of cultural identities in the face of globalization. Each piece reflects our journal's vision to foster meaningful, inclusive, interdisciplinary dialogues.

As an Editor-in-Chief, I deeply appreciate our contributors, reviewers, and editorial team's scholarly rigor and dedication. We remain steadfast in our goal to provide an open intellectual space where past and present, tradition and innovation, belief and critique may all meet in critical conversation.

We welcome your continued engagement, and we look forward to future contributions that shape and deepen our understanding of culture, history, and religion in the 21st century.

Dr. Alma B. Manera
Editor-in-Chief

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Article

The Traditional Game of *Dakon* as a Learning Medium for Indonesian Language for Foreign Speakers at Yale University, United States

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Abstract

This article explores the use of the traditional Indonesian game, dakon, as a medium for learning Indonesian for non-native speakers at Yale University, United States. This study is based on the theory of game-based learning, which states that game-based learning can increase student motivation and engagement. Dakon, as a traditional game that requires verbal interaction, strategy, and calculation, is believed to be an effective tool in language learning, especially in developing speaking, listening, and vocabulary skills. This study uses a qualitative approach with interviews and observations of 44 non-native Indonesian language students at Yale University. The results show that the use of dakon in Indonesian language learning increases student participation, enriches their vocabulary, and strengthens their understanding of Indonesian culture. Based on the calculation of Cohen's d, a significant difference in speaking skills between the two groups was found, with a value of Cohen's d = 1.81, indicating a large effect size. This suggests that the use of dakon in language learning has a more substantial impact on improving Indonesian speaking skills compared to conventional methods.

Keywords: *Dakon, Game-based Learning, Indonesian language learning for foreign speakers, Yale University*

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Introduction

Second or foreign language learning is not solely dependent on teaching grammar theory and vocabulary but also involves approaches that support active student engagement in the learning process (Arisnawati & Yulianti, 2022). In the modern era, many creative approaches are used, one of which is game-based learning (Dahalan et al., 2024). This approach combines game elements with learning to create a more interactive and engaging atmosphere. One traditional Indonesian game with potential for use in Indonesian language learning is *dakon*.

The *dakon* game is widely known in Indonesia and several Southeast Asian countries as a strategy game that involves counting skills and player interaction (Utami et al., 2024). Besides being a form of entertainment, this game can also be used as a teaching tool in language classes, particularly to develop practical language skills (Suryani et al., 2021). This article aims to examine how *dakon* can be used as a medium for teaching Indonesian to foreign speakers at Yale University, United States.

Dakon is a traditional Indonesian game that uses a board with holes and seeds as playing tools (Maulidiyyah et al., 2021). The *dakon* board has two rows of small holes and two larger holes at each end. This game is played by two people sitting opposite each other. Each player has a large hole on their right side as a storage area (called a "lumbung"). The objective of the game is to collect as many seeds as possible in their lumbung. The game begins with each small hole filled with an equal number of seeds. Players take turns picking up seeds from one of their holes and distributing them one by one into the next holes in a clockwise direction. If the last seed falls into a hole that contains other seeds, the player can continue by taking the seeds from that hole. If the last seed falls into their own lumbung, the player gets another turn. The game ends when all the small holes are empty, and the winner is the player with the most seeds in their lumbung. *Dakon* is not only an entertaining game but also helps develop strategy, calculation, and patience.

Using games as a learning medium allows students to engage actively and enjoy learning as they receive information passively and directly interact with the lesson material (Kurniawan et al., 2024). This approach is highly beneficial in language learning, as language is a skill developed through practice. Game-based learning gives students the opportunity to practice the language in a contextual and situational manner, often more effective than conventional teaching methods (Pramadhanti et al., 2023). Through games, students experience real-life situations that require communication, problem-solving, and collaboration—all essential for language mastery.

Using *dakon* as a medium for Indonesian language learning for foreign speakers has several advantages. In addition to involving aspects of strategy and calculation, *dakon* also encourages communication between players, which in turn helps improve speaking and listening skills (Winarsih, 2018). The use of verbal instructions during the game, such as counting seeds, giving directions, or discussing the next move (Herawati, 2024), allows students to practice speaking with basic vocabulary and sentence structures. Furthermore, *dakon* provides an enjoyable context for learning vocabulary related to numbers, counting, and instructions in Indonesian. This game is suitable for helping foreign learners of Indonesian better understand language use in a more natural context.

Moreover, integrating traditional games like *dakon* in Indonesian language learning for foreign speakers also offers an important cultural dimension. Language and culture cannot be separated, and by learning traditional games, students also gain insight into broader Indonesian culture, such as social values, norms, and interaction patterns (Saddhono et al., 2024). This makes *dakon* not only a language learning tool but also a way to introduce Indonesian culture more deeply to foreign speakers at Yale University.

In addition to being a language learning medium, *dakon* also plays a role in instilling a deeper cultural understanding. Students not only learn the language theoretically but also gain firsthand experience of how cultural values are reflected in everyday social interactions. In the Indonesian context, games like *dakon* teach values of cooperation, patience, strategy, and respect for opponents—all significant parts of Indonesian social norms (Nuryanto, 2014). Thus, *dakon* serves not only as a language learning tool but also as a medium for fostering cross-cultural understanding. At Yale University, which has a multicultural educational environment, using *dakon* in Indonesian language learning for foreign speakers gives international students the opportunity to deepen their understanding of Indonesian culture while improving their language skills.

By incorporating game elements, the classroom atmosphere becomes more dynamic and encourages students to participate more (Salma & Rizal, 2023). In such situations, interaction between students becomes more natural and less forced. They feel freer to speak, make mistakes, and learn from these experiences, as the competitive atmosphere brought by the *dakon* game helps to relieve the pressure typically present in conventional classes. Besides enhancing speaking skills, the *dakon* game also strengthens listening skills. Students must listen to instructions, calculations, and their opponent's moves to make strategic decisions in the game. This encourages students to focus more intently, a critical skill in language learning.

The *dakon* game itself has long been part of Indonesian culture (Zuhrita & Mufidati, 2017). In this game, two players compete to fill holes in the *dakon* board with seeds while counting the number of seeds distributed (Fad, 2014). Verbal interaction during the game involves using verbs, numbers, instructions, and everyday vocabulary that are relevant for learning Indonesian.

Methodology

The research method used in this article is a qualitative approach with semi-structured interviews and participatory observation. This study involved 44 students at Yale University enrolled in an elementary-level Indonesian language course. The students were divided into two groups: an experimental group that used the *dakon* game as a learning medium and a control group that used conventional teaching methods. Research instruments included pre- and post-learning questionnaires to measure students' language skills development, while in-depth interviews were conducted to explore students' experiences and perceptions regarding the use of *dakon* in learning. Participatory observation was conducted directly during the learning process, noting verbal and non-verbal interactions that occurred in the classroom.

The data analysis technique used in this study is thematic analysis. Data obtained from interviews and observations were categorized into specific themes relevant to the research objectives. The analysis process was conducted repeatedly to ensure that all collected data were analyzed in-depth and contextually. In addition, the results of the questionnaires were analyzed descriptively and quantitatively to compare the results of the experimental and control groups. Qualitative and quantitative data were then combined to provide a comprehensive picture of the effectiveness of using *dakon* as a cultural communication symbol in Indonesian language learning.

To ensure data validity, this study applied triangulation techniques, which involved comparing the results of interviews, observations, and questionnaire analysis. Triangulation was carried out to reduce bias and increase the reliability of the research results. Additionally, member checking was conducted by allowing participants to review the interview results and provide feedback if there were discrepancies in interpretation. Field notes from observations were also repeatedly reviewed to ensure the consistency of the collected data. By applying these techniques, the research is expected to produce valid and reliable findings in examining the role of *dakon* as a cultural communication symbol in Indonesian language learning for foreign speakers.

Results/Findings

The use of *dakon* in Indonesian language classes at Yale University also shows that students are more motivated and engaged in learning. They feel more enthusiastic about learning new vocabulary, understanding number concepts, and communicating confidently in Indonesian. This entire process demonstrates that game-based learning, especially when involving traditional games like *dakon*, is an effective and innovative method to introduce language and culture simultaneously to foreign speakers. Thus, *dakon* serves not only as a learning tool but also as a bridge connecting students with the broader cultural aspects of the language they are studying. This approach can enrich the experience of learning Indonesian at Yale University and at various other institutions abroad, helping to develop language skills and cultural understanding simultaneously. As a recommendation, game-based learning approaches that use traditional games like *dakon* could be expanded to various other language learning contexts. Integrating culture through games like these has proven not only to accelerate language acquisition but also to deepen appreciation for the culture of the language being studied. Ultimately, the use of *dakon* and other traditional games can provide a more comprehensive and holistic learning experience for foreign speakers.

Figure 1. Implementation of Indonesian Language Learning through the *Dakon* Game

According to game-based learning theory, the use of games in education can enhance students' emotional engagement, which in turn contributes to motivation and learning success (Prensky, 2003). Game-based learning also enables students to learn in a fun and interactive context, which naturally strengthens their skills. Furthermore,

traditional games have a strong cultural dimension, so their use in foreign language classes can also enhance students' understanding of the culture and language they are learning (Gee, 2003).

In this study, the calculation of Cohen's d was performed to measure the magnitude of the difference between the experimental group, which used the *dakon* game as a learning medium, and the control group, which used conventional methods, in improving speaking skills in Indonesian for foreign language learners. The average speaking skill of the experimental group post-learning was 4.1, while the control group had an average of 3.1.

The first step in calculating Cohen's d is to find the pooled standard deviation (SD pooled) of both groups. Based on the available data, the standard deviation of the experimental group is 0.5, and the standard deviation of the control group is 0.6. The number of participants in both groups is 22. The pooled standard deviation is calculated using the following formula:

$$\text{SD pooled} = \sqrt{\frac{(n_1 - 1) \cdot \text{SD}_1^2 + (n_2 - 1) \cdot \text{SD}_2^2}{n_1 + n_2 - 2}}$$

After performing the calculation, the SD pooled was found to be 0.55.

Next, Cohen's d was calculated using the formula:

$$d = \frac{M_1 - M_2}{\text{SD pooled}}$$

With M_1 = 4.1 (mean of the experimental group) and M_2 = 3.1 (mean of the control group), the calculation of Cohen's d is as follows:

$$d = \frac{4.1 - 3.1}{0.55} = \frac{1}{0.55} \approx 1.81$$

The result shows that Cohen's d = 1.81, which falls into the category of large effect size. This indicates that the difference in speaking skills between the experimental and control groups is highly significant, with a large impact. In other words, the use of *dakon* as a learning medium had a much stronger effect on improving speaking skills compared to the conventional methods used by the control group. Overall, a Cohen's d = 1.81 suggests that the impact of using *dakon* in this context is

substantial in improving Indonesian language learning for foreign students at Yale University.

This study examines the impact of using the *dakon* game as a medium for teaching Indonesian to foreign language learners at Yale University, United States, by comparing two groups of students enrolled in a basic Indonesian language course. The experimental group used *dakon* as a learning method, while the control group employed conventional teaching methods. Based on the calculation of Cohen's d, a significant difference in speaking skills between the two groups was found, with a value of Cohen's d = 1.81, indicating a large effect size. This suggests that the use of *dakon* in language learning has a more substantial impact on improving Indonesian speaking skills compared to conventional methods.

The results show that the experimental group using *dakon* experienced a more significant improvement in speaking skills, with an average post-learning score of 4.1, compared to the control group, which only achieved 3.1. This difference was reflected in observations made during the learning process, where the experimental group demonstrated more verbal and non-verbal interactions in class, supporting better language comprehension and strengthening communication among students. This improvement in language skills was not limited to speaking but also extended to listening, reading, and writing, although the impact was most apparent in speaking.

Students involved in the *dakon* game experienced significant improvements in speaking and listening skills compared to the control group that did not use the game-based method. Students playing *dakon* were more frequently engaged in active conversations, both with their peers and the instructor, due to the continuous verbal interactions required by the game dynamics. This finding aligns with previous research showing that game-based approaches can enhance engagement and verbal interaction in language learning (Zou et al., 2021). Additionally, students participating in the *dakon* game felt more confident speaking. The competitive yet enjoyable nature of the game alleviated the anxiety typically associated with making mistakes, thus reducing the pressure often felt in traditional classroom settings (Eltahir et al., 2021). Interviews with students revealed that they felt freer to experiment with language without the fear of being judged for minor errors, an experience they did not encounter in formal classroom settings.

Dakon also provided students with a context to practice vocabulary related to numbers, commands, and strategies. Words such as "one," "two," "take," "place," and "count" were repeatedly used throughout the game, helping students become more familiar with these terms and increasing their ability to use them in everyday conversation. This repetition supports language learning theories that emphasize the

importance of repeated practice in reinforcing memory and language use (Teng, 2023). Furthermore, students' listening skills also significantly improved. Since *dakon* involves two players who must interact verbally, students had to listen attentively to the instructions or actions taken by their opponents. This forced them to focus on understanding spoken Indonesian, which directly enhanced their listening skills. Several students reported that they became better at recognizing vocabulary and understanding simple sentences, even when their opponents spoke quickly. This experience is consistent with research that shows verbal interaction in game contexts can improve listening skills (Ye & Kaplan, 2024).

Another aspect that supports the effectiveness of *dakon* as a learning medium is the involvement of number concepts in Indonesian. Since the game requires counting the seeds at each turn, students are indirectly trained to use and understand numbers in Indonesian. The repetitive use of numbers in the game context helps students internalize these concepts more quickly than traditional teaching methods, which typically teach numbers through memorization. The act of counting during the game becomes an enjoyable activity, making it easier for students to remember and use numbers in everyday conversations. For instance, one student mentioned that they previously struggled to remember how to pronounce numbers in Indonesian, but after playing *dakon*, they were able to more fluently name numbers in Indonesian because they had become accustomed to counting the seeds in the game. The repetitive counting process, such as "one, two, three," automatically helped students understand how numbers work in Indonesian. This aligns with research showing that game-based learning, through its engaging and repetitive nature, facilitates more effective learning of numerical concepts (Situmorang et al., 2024).

Overall, students engaged in *dakon* demonstrated significant benefits in speaking, listening, and understanding numerical concepts in Indonesian. This active, structured, and game-based learning experience provided a more comprehensive learning environment compared to traditional methods, leading to greater improvements in students' language skills. The benefits of game-based learning have been widely acknowledged, as it not only enhances cognitive skills but also increases engagement and motivation (Greipl et al., 2020).

In addition to improvements in speaking, listening, and understanding numbers, the use of *dakon* also showed positive effects on students' social and emotional involvement. The game created a more relaxed and enjoyable learning atmosphere, which increased students' motivation and confidence in learning Indonesian. According to interviews with students, they acknowledged that the competitive and interactive nature of *dakon* motivated them to participate more

actively and use Indonesian more frequently. This contrasts with conventional learning methods, which are often perceived as rigid and formal, leaving little room for students to practice the language in a relaxed setting (Siegel, 2023).

Students also mentioned that they enjoyed the learning process more when involved in the game because *dakon* provided space for indirect learning. They could learn sentence structures, new vocabulary, and how to speak Indonesian without feeling burdened by academic pressure. This informal learning atmosphere encouraged active participation, positively impacting their communication skills. Students became more willing to attempt speaking, even knowing they might make mistakes. This is crucial in language learning, as errors are often a natural and essential part of the learning process (Koraishi, 2023).

From a social engagement perspective, *dakon* promotes interaction among students, fostering opportunities for collaboration and mutual learning. The game requires teamwork and strategy, encouraging students to discuss and communicate with their peers, which provides valuable opportunities to use Indonesian in real-life contexts beyond the formal classroom environment (Saputra et al., 2024). Some students reported feeling a stronger connection with their classmates due to the social interactions that occurred during the game, highlighting that *dakon* functions not only as a language learning tool but also as a means of strengthening social bonds among students (Rohmadi et al., 2023).

From the instructor's perspective, *dakon* offers a unique opportunity for direct observation of students' language development. As the game involves extensive verbal interaction, instructors can identify areas where students struggle, such as pronunciation, vocabulary usage, or sentence structure (Debi et al., 2023). This allows instructors to offer more targeted and personalized feedback. Several instructors reported that *dakon* provided insight into how students naturally adapted to the Indonesian language, making it easier to tailor teaching strategies to individual student needs (Saputra et al., 2023).

Moreover, *dakon* facilitates interdisciplinary learning. While the game is rooted in strategy and counting, its content can be expanded to incorporate other language components, such as culture, new vocabulary, and grammar (Alomair & Hammami, 2024). Instructors can modify the game by requiring players to construct complete sentences or specific phrases before making a move, thus enhancing the complexity of the language learning experience. This approach encourages students to think critically and creatively while using the language, which is consistent with active learning principles (Lombardi et al., 2021). *Dakon* also serves as an informal assessment tool to evaluate students' language proficiency. By observing students in a relaxed,

interactive context, instructors can better gauge whether students can apply the language practically, rather than relying solely on formal written or oral tests. This game-based assessment provides a more holistic view of students' abilities, as it assesses language use in a more natural and cognitively engaging situation.

Given its numerous advantages, *dakon* proves to be an effective medium for language learning that goes beyond developing linguistic skills and also fosters social, emotional, and cultural competencies (Adi & Ssukarmin, 2022). At Yale University, the integration of *dakon* into the Indonesian language curriculum can serve as a valuable tool to enhance language learning programs, promoting a more integrative, enjoyable, and beneficial approach for students. By using game-based learning, traditional games like *dakon* can address common challenges in foreign language acquisition while simultaneously offering a deeper understanding of Indonesian culture. In the long run, similar game-based approaches can be applied to language learning in various international contexts, creating a richer and more memorable experience that accelerates language acquisition and enhances cross-cultural understanding.

From a cultural understanding perspective, students also acknowledged that the game provided new insights into Indonesian culture, something they could not acquire through traditional teaching methods. As a game that contains values of cooperation and strategy, *dakon* helps them experience firsthand some of the social and cultural aspects of Indonesia. In terms of cultural understanding, the *dakon* game does not only serve as a language learning tool but also as a window for students to better understand Indonesian culture. Through this game, students at Yale University gained direct experience with social and cultural aspects that are difficult to teach theoretically through traditional teaching methods. In interviews, many students admitted that they felt the *dakon* game gave them a deeper understanding of Indonesian culture compared to formal learning that typically focuses on grammar, vocabulary, or sentence structure.

One of the most prominent cultural aspects of the *dakon* game is the values of cooperation and strategy embedded within it. *Dakon* is not merely an individual game; it involves two players who interact and compete using specific tactics. In the Indonesian context, this game teaches the importance of cooperation, not only in terms of winning or losing but also in maintaining good relationships with opponents. The value of "gotong royong" (mutual cooperation), which is central to Indonesian social life, is reflected in the way this game is played. Students involved in the game learn that it is not only about competition but also about appreciating the process and interacting with the opponent.

Moreover, *dakon* teaches students the importance of patience and strategic planning, two values frequently found in Indonesian social and cultural interactions. In this game, players must make wise decisions based on counting seeds and predicting the opponent's next move. Students, who are more accustomed to Western cultures, which emphasize speed and efficiency, feel the difference in thinking and acting when playing *dakon*. They are encouraged to be more patient, wait their turn, and consider the long-term consequences of each move they make. In interviews, some students mentioned that playing *dakon* helped them understand a more "process-oriented" way of thinking, often seen in Indonesian social interactions, where decisions are made by considering balance and social harmony.

Through *dakon*, students are also exposed to the concepts of simplicity and togetherness, which are characteristic of traditional Indonesian culture. *Dakon* is played with very simple tools—wooden boards and seeds—yet the game fosters deep interactions between players. This simplicity reflects the traditional Indonesian lifestyle, which values togetherness and social interaction over technology or material sophistication. Students participating in the game realize that behind its simplicity, *dakon* contains profound cultural values that shape how Indonesians relate to each other, both in the context of the game and in everyday life.

Through direct observation of how *dakon* is played, students also learn the concept of balance in Indonesian culture. This balance is evident in how the game evenly distributes the seeds, as well as how the strategies employed by players must take into account the distribution of available resources. This concept parallels life in Indonesia, where the values of balance, harmony, and justice in resource distribution often take center stage in a communal, agrarian society. Students, accustomed to individualism and aggressive competition in the West, learn that in the Indonesian context, strategies used are not just about individual victory but also about maintaining harmony in social interactions. Thus, *dakon* not only introduces students to the rules of the game and tactics but also provides a broader picture of the social and cultural dynamics in Indonesia. Through this game, they indirectly learn about the philosophy of life in Indonesian society, which emphasizes social relationships, balance, and patience—elements that are difficult to explain thoroughly through formal teaching methods that focus only on linguistic aspects.

In interviews, students admitted that playing *dakon* enriched their perspectives on Indonesian culture and made them more interested in learning more about Indonesian society. They felt that understanding culture through games provided a more tangible and personal experience compared to merely reading textbooks or attending lectures about culture. This experience also deepened their appreciation for

the values upheld in Indonesian society, which may differ from the values they know in their own cultures. Overall, this experience makes *dakon* an effective learning tool, not only in terms of language but also in introducing and deeply understanding Indonesian culture more comprehensively.

In addition to teaching cultural values such as cooperation, patience, and balance, *dakon* also serves as a means to enrich students' understanding of local Indonesian traditions and history. This game has been played by Indonesian communities for centuries, highlighting how traditional games have become an integral part of daily life and collective culture. In interviews, several students at Yale University mentioned that they were previously unaware of the significance of games like *dakon* in Indonesian history and culture. Through the playing process, they not only learned the rules of the game but also about how this game reflects Indonesia's historical journey and the lives of its people, from the past to the present.

Dakon is believed to originate from ancient times when similar board games were played in various parts of the world, particularly in Southeast Asia and Africa. Students who played *dakon* in their Indonesian language class gained insights into how this game evolved and adapted to Indonesia's local context. They began to understand that this game is not merely an entertainment tool but a medium rich with values and knowledge passed down through generations. This becomes part of a cross-cultural learning process that introduces students to Indonesia's rich historical heritage.

Furthermore, students also learned how *dakon* is often played in various social settings in Indonesian society, from games in the courtyard to large community events. In the context of cultural learning, this game provides a concrete view of everyday life in Indonesia, which cannot always be captured through more academic teaching materials. Students learned that *dakon* is not only played for fun but also as a way to strengthen social bonds among family, friends, and communities. This form of social interaction reinforces the ties between individuals, a crucial aspect of Indonesian social life.

In addition to the historical aspects, *dakon* also helps students understand how this game is closely linked to Indonesia's agrarian context and natural resources. The use of seeds in the game, such as sawo seeds or small stones, reflects the Indonesian people's strong connection to nature. These seeds are not just game tools but symbols that show the society's relationship with their environment—something often encountered in traditional Indonesian culture. Through this game, students can see how the agrarian lifestyle influences various aspects of life, including traditional games.

Students also observed that *dakon* is often played in open spaces or more natural environments, illustrating the connection between the game and nature. Yale students, who are more accustomed to digital games or indoor games, were surprised to see how a simple game like *dakon* can be played in various places using resources readily available in the surroundings. This provided them with a new perspective on how traditional Indonesian communities utilized what was available in their environment to create entertainment and social interaction. Furthermore, the experience of playing *dakon* gave students a deeper understanding of the differences between modern and traditional games, as well as how traditional games often carry more fundamental values in social life. Students, who were previously only exposed to digital games or advanced technology, realized that games like *dakon* have a different depth of meaning. They saw how traditional games are not just about competition but also about social reflection, strategy, and teaching broader values such as solidarity, integrity, and perseverance.

In interviews, some students stated that they felt more connected to Indonesian culture after playing *dakon* because they directly experienced how Indonesian society values this game in daily life. Additionally, they felt that this traditional game gave them an understanding of how local Indonesian culture has survived and evolved amid modernization and globalization. This opened a broader discussion about the preservation of traditional culture in the modern era, something highly relevant to students interested in cultural studies and anthropology. Overall, *dakon* has not only proven to be an effective language learning medium but also succeeded in introducing and deepening students' understanding of culture and social life in Indonesia. By connecting elements of tradition, history, and cultural values, this game enriches the learning experience of students at Yale University, helping them see that language learning is inseparable from understanding the culture that accompanies it. Through this game, students gain a more holistic view of what it means to be a part of Indonesian society and how a simple game like *dakon* can carry and reflect the depth of culture behind it.

Conclusions

The use of traditional *dakon* games as a tool in Indonesian language learning at Yale University has been proven effective in improving speaking, listening, and vocabulary skills for non-native speakers. In addition, *dakon* also helps introduce Indonesian cultural elements to students, creating a more dynamic and interactive learning environment. The results of this study support the idea that game-based learning, especially those with cultural elements, can be an innovative approach to

foreign language teaching. Additionally, *dakon* supports interdisciplinary learning by combining language skills with cultural understanding, critical thinking, and creativity. Furthermore, the game serves as an informal assessment method that allows instructors to evaluate students' practical language proficiency in an interactive and relaxed environment. Ultimately, *dakon* not only contributes to language learning but also enhances social, emotional, and cultural competencies, making it an effective and holistic educational tool.

Based on the findings, it is recommended that *dakon* be incorporated more widely into language learning programs, especially in foreign language contexts like Indonesian at Yale University. Teachers should consider using *dakon* as both a pedagogical tool and a form of informal assessment to observe and evaluate students' language use in dynamic and real-world situations. Moreover, instructors can adapt the game to include more complex language tasks, such as requiring students to construct complete sentences or use specific vocabulary during gameplay, thereby enhancing its educational value. It is also recommended that future studies explore the long-term effects of game-based learning on language acquisition and cultural understanding. Additionally, expanding the use of *dakon* in cross-cultural settings can provide students with a deeper appreciation for the cultural and historical contexts that shape language and communication. By leveraging game-based learning, language programs can create more engaging, interactive, and meaningful experiences for students, promoting both language mastery and cross-cultural competence.

Conflict of Interests

The author(s) declare that there are no conflicts of interest regarding the publication of this research. The research was conducted objectively, and the analysis was carried out without any external influences or financial interests that could have biased the results. All findings and recommendations presented are based on the data collected and the research objectives, without any personal or professional interests that could have affected the integrity of the study.

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Article

Religiousness in Javanese Language and Culture Communication: A Sociopragmatic Study in Java Island, Indonesia

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Abstract

This research aims to explore religious aspects in the Javanese language through a sociopragmatic approach, focusing on the regions of Central Java, East Java, and Yogyakarta in Java Island. The study examines how religious elements are reflected in the daily use of the Javanese language, both in spoken and written forms. The research methods used include observation, interviews, and document analysis to collect comprehensive data. The study reveals that religious aspects in the Javanese language not only reflect the beliefs and religious practices of the Javanese people but also play a crucial role in shaping social interactions and language structure. Religious elements are evident in various contexts, such as the use of specific terms in formal and informal communication, the expression of prayers or gratitude, and the use of language as a medium in religious rituals. The findings indicate that the Javanese language possesses interconnected social and spiritual functions, enriching the understanding of the relationship between language and culture. This research also contributes to sociolinguistic and pragmatic studies, particularly in understanding the role of language as a reflection of deeply rooted religious values in society. Consequently, this research opens further discussions on the preservation of the Javanese language as a cultural heritage rich in religious values.

Keywords: *Java Island, Javanese Language, Oral and Written Discourse, Religious, Sociopragmatics*

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Introduction

The Javanese language is one of Indonesia's regional languages rich in cultural and religious values (Siregar, 2021). In Central Java, East Java, and Yogyakarta, Javanese serves not only as a communication tool but also as a medium for expressing religious values (Wulandari & Nurdiati, 2023). Both in oral and written traditions, Javanese is often used to convey prayers, chants, or teachings imbued with spiritual values (Pamungkas et al., 2024). The language also acts as a bridge to maintain the relationship between humans and the Creator through distinctive religious expressions. For instance, terms like "ngaturaken" or "nyuwun pangestu" reflect deep reverence toward God and others. Additionally, Javanese embodies life philosophies found in proverbs and wise sayings, such as "urip iku urup," which teaches the importance of living a life that benefits others. Thus, Javanese functions not only as a daily communication tool but also plays a vital role in conveying the religious values and life philosophies of the Javanese people. Its existence symbolizes cultural identity while reflecting the spiritual wealth of the community.

The Javanese language contains an abundance of vocabulary, expressions, and linguistic forms that reflect religious aspects (Sumbulah et al., 2022). This is evident in various traditions and spiritual practices of Javanese society. Javanese features numerous words and terms used specifically in religious and spiritual contexts (Suroso & Rohmadi, 2023). For example, the words "donga" (prayer), "puja" (praise), and "slametan" (thanksgiving ceremony) illustrate not only spiritual concepts but also carry profound meanings tied to the beliefs and religious practices of the Javanese people. Javanese is frequently employed in expressions and mantras recited during traditional ceremonies or religious rituals (Muharrom et al., 2023). These mantras often possess distinctive linguistic structures rich in symbolism. For instance, mantras in the "Ruwatan" ceremony are used to cleanse oneself from misfortune, while those in "Tirakatan" seek blessings. In various Javanese traditional ceremonies, such as weddings, births, and funerals, Javanese is extensively used. These ceremonies are typically initiated with prayers and mantras in Javanese, regarded as sacred. The language used in such contexts is often formal and imbued with reverence. Many religious texts in Javanese tradition are written in the Javanese language, including Serat Wedhatama, Serat Centhini, and the works of Sunan Kalijaga (Syihabuddin et al., 2024). These texts not only convey moral and spiritual teachings but also contain deep and complex life philosophies, presented in beautiful and meaningful language. In Islamic boarding schools (pesantren) across Java, religious teachings are frequently delivered in Javanese. Classic Islamic texts (kitab kuning) studied in pesantren are often translated or accompanied by explanations in Javanese, facilitating students'

understanding of religious teachings. Javanese is used to explain theological concepts, Islamic law, and mysticism (tasawuf). In daily life, many Javanese people continue to use Javanese in their personal prayers. Prayers before meals, before sleep, or when starting work are often recited in Javanese. This highlights how Javanese remains an integral part of everyday spiritual life. Thus, the Javanese language serves not only as a means of communication but also as an essential medium for preserving and transmitting the spiritual traditions and religious values of Javanese society. Its use in various religious aspects underscores the continued relevance and significance of the Javanese language in spiritual life today.

Kejawen is a belief system widely embraced by the Javanese people, reflecting the complex interaction between culture and religion (Soenjoto, 2022). As a syncretic faith, Kejawen blends elements of animism, Hindu-Buddhism, and Islam (Al Amin et al., 2020). Animism, the indigenous belief of the Javanese, venerates ancestral spirits and natural forces (Aragon, 2021). This animistic influence is evident in various traditional ceremonies and rituals aimed at maintaining harmony with nature and seeking blessings from ancestral spirits (Allo et al., 2024). Hindu and Buddhist influences began entering Java in the first century CE and continued to flourish until the 15th century, contributing teachings on karma, reincarnation, and meditation that became integral to Kejawen. Islam began to spread in Java during the 15th century, influencing Kejawen with monotheistic concepts and Islamic practices (Idham, 2021). However, in Kejawen, Islam is applied flexibly, often adapted to local customs and traditions. The Javanese language plays a crucial role in expressing spiritual concepts within Kejawen. One of the key concepts is harmony with nature (keseimbangan alam), where humans are seen as part of the universe, required to live in balance with nature (Kristina, 2021). This belief is frequently conveyed through Javanese proverbs such as "urip iku sawang sinawang" (life is about perceiving and being perceived), highlighting the importance of understanding and respecting the surrounding environment and life. Traditional ceremonies like Slametan and Ruwatan exemplify efforts to maintain harmony with nature and ancestral spirits, using Javanese prayers and mantras.Another central concept is wisdom of life (kebijaksanaan hidup). Kejawen imparts life wisdom passed down through generations via wayang (shadow puppet stories), tembang (songs), and serat (ancient manuscripts). The Javanese language is a medium for conveying moral values and philosophies of life, such as "sabdo pandito ratu" (the words of a wise man are akin to those of a king). Serat Wedhatama, an essential Kejawen text written in Javanese, teaches ethical and philosophical lessons on life. The final concept is spiritual power (kekuatan spiritual). In Kejawen, spiritual strength is attained through meditation, tirakat (fasting and

ascetic practices), and prayer (Sartini, 2021). The Javanese language is used in numerous rituals and spiritual practices to seek strength and protection from God and ancestral spirits. Javanese mantras, such as "mantra kekebalan" (invulnerability mantra) or "mantra keberkahan" (blessing mantra), are believed to hold magical power, granting protection or fortune when recited sincerely and correctly. Kejawen reflects the rich cultural and religious heritage of Java, demonstrating how local traditions interact and merge with external influences such as Hinduism, Buddhism, and Islam (Ruslan et al., 2024). The Javanese language serves as a vital medium for expressing Kejawen's spiritual concepts, preserving harmony with nature, spreading life wisdom, and nurturing spiritual power. Through the use of language, Kejawen's teachings and values remain vibrant and relevant in the lives of the Javanese people today.

Islam has been the majority religion in Java for centuries, and its influence is clearly reflected in the Javanese language. As Islam spread across Java, numerous terms and concepts from Arabic were adopted into Javanese (Tohe, 2021). Words such as "iman" (faith), "sholat" (prayer), and "puasa" (fasting) have become part of the everyday vocabulary of the Javanese people. This demonstrates how religious terms from Arabic have been integrated into Javanese language and culture. In addition to direct borrowings, many Arabic terms underwent phonetic changes to better suit the Javanese tongue. For example, "zakāt" became "zakat", "hajj" turned into "haji", and "ṣalāh" evolved into "sholat".Many religious texts in Javanese are translations or adaptations of classical Islamic literature (Zuhri, 2022). Serat Wirid Hidayat Jati, a work by Sunan Kalijaga, is one example of a Javanese religious text containing Islamic teachings. Translations of the Qur'an into Javanese, such as Tafsir Tarjuman Al-Mustafid, enrich the language and culture of Java with Islamic values. In pesantren (Islamic boarding schools), Javanese is often used as the medium of instruction for studying kitab kuning (classical Islamic texts) written in Arabic. Students learn Islamic jurisprudence, Qur'anic exegesis, and hadith through explanations delivered in Javanese to facilitate comprehension. During religious rituals such as pengajian (Islamic study gatherings), tahlilan (prayer recitations for the deceased), and selamatan (thanksgiving ceremonies), Javanese is used to offer prayers and convey Islamic values to the community (Rusmana, et al., 2024). Prayers like "donga slametan" (thanksgiving prayer) and "donga tahlil" (prayers during tahlilan) are often recited in Javanese, interspersed with Arabic terms. Islam has also influenced Javanese literature and arts, including tembang (songs), wayang (shadow puppet theater), and serat (ancient manuscripts). For example, Serat Centhini, a renowned Javanese literary work rich in Islamic teachings and values, narrates the spiritual journey and religious

education of a santri (student of Islam). Wayang kulit, a traditional Javanese performance art, incorporates stories infused with Islamic values, while still retaining older Hindu-Buddhist elements. The influence of Islam on the Javanese language reflects a profound and ongoing process of cultural assimilation (Afandi, 2023). The adoption of Arabic terms, the translation of religious texts, the use of Javanese in religious education and rituals, and the impact on literature and art all highlight how Islam has enriched and broadened the cultural horizons of Java. This integration not only strengthens the religious identity of the Javanese people but also preserves the Javanese language as a vital medium in their spiritual and cultural lives.

The Javanese language encompasses several distinct dialects, such as the Banyumasan dialect, the Surakarta dialect, and the Yogyakarta dialect. Each dialect carries unique characteristics in expressing religious aspects, and despite differences, the essence of religious messages remains preserved and understood by all Javanese speakers (Saddhono & Hartanto, 2021). The Yogyakarta dialect, often referred to as "Ngoko Alus," is known for its refinement and formality. This dialect is frequently used in polite and formal contexts, especially during traditional ceremonies and religious events (Udasmoro et al., 2023). For instance, in prayers and Islamic study gatherings (pengajian), the use of words such as "panjenengan" (you – polite) and "nderek" (to follow – polite) reflects a high level of politeness and respect. In traditional ceremonies like Sekaten (the commemoration of the Prophet Muhammad's birthday), the language used is highly formal and reverent, embodying noble Islamic values. Javanese tembang (songs) performed during religious ceremonies often employ the Yogyakarta dialect to create a solemn and sacred atmosphere. The Surakarta dialect, or Basa Krama, is similarly recognized for its refinement, closely resembling the Yogyakarta dialect, though differing in word choices and intonation. In religious contexts, such as traditional Javanese weddings, prayers and advice are often delivered in the Surakarta dialect to evoke formality and reverence. In rituals like Tedhak Siten (a child's first steps on the ground), the use of the refined Surakarta dialect enhances the sacredness and gravity of the occasion. Javanese manuscripts written in Surakarta, such as Serat Wedhatama, employ highly polished language to convey moral and spiritual teachings. The Banyumasan dialect, or Ngapak, is known for its straightforwardness and its closeness to the everyday speech of the people (Heriyanti & Ma'ruf, 2021). In religious contexts, words like "kowe" (you) and "aku" (I) are commonly used in daily conversations and informal religious settings. In Islamic study sessions in the Banyumas region, religious lectures are often delivered in plain and direct language, making them easier for the general public to grasp. During rituals like Slametan or Kenduren (thanksgiving ceremonies), the Banyumasan

dialect is used in prayers and advice, fostering a warm and grounded atmosphere. Despite the dialectal differences in Javanese, the core of religious messages remains intact and comprehensible to all Javanese speakers. Each dialect brings its own flavor to the expression of religious aspects, reflecting the cultural and linguistic diversity within Javanese society. The refined and formal Yogyakarta and Surakarta dialects lend a solemn tone to religious ceremonies, while the straightforward Banyumasan dialect ensures that religious teachings are accessible and relatable to the community. This illustrates the richness of the Javanese language in conveying profound spiritual and religious values.

The Javanese language plays a vital role as the medium of instruction in many Islamic boarding schools (pesantren) and educational institutions that teach religious values. The use of Javanese in religious and philosophical education helps preserve Javanese cultural and spiritual values (Sobaya et al., 2023). In numerous pesantren across Java, Javanese serves as the primary language for studying classical Islamic texts written in Arabic. Students (santri) are taught to understand Islamic teachings through Javanese explanations, facilitating their comprehension of complex concepts. Classical Islamic texts, known as kitab kuning (yellow books), such as Quranic interpretations (tafsir), hadith, Islamic jurisprudence (fiqh), and mysticism (tasawuf), are often translated or annotated in Javanese. This includes works like Fathul Mu'in and Sullam Taufiq, which have been translated into Javanese to aid understanding. In many Javanese schools, Javanese is taught as a compulsory subject. These lessons not only cover language but also the cultural and religious values embedded in classical Javanese texts. Classical texts such as Serat Centhini and Serat Wedhatama remain part of the curriculum, guiding students in understanding Javanese religious and philosophical values. Serat Centhini, for instance, contains rich moral and spiritual teachings essential for character development. It is one of the most comprehensive works of Javanese literature, encompassing various aspects of life, including religious teachings, philosophy, and customs. Written in the form of tembang (Javanese poetry), this text is often used as teaching material in pesantren to impart religious and cultural values. Its stories provide deep insights into leading a spiritual life in accordance with Islamic and Javanese values. Serat Wedhatama, authored by KGPAA Mangkunegara IV, focuses on moral and spiritual teachings. This work conveys wisdom and ethics through refined and beautiful language. In pesantren and schools, Serat Wedhatama is used to instill wisdom and moral values in students, fostering good character and a deeper understanding of religious principles. The use of Javanese in religious education plays a crucial role in preserving Javanese culture and religious values. Through this language, religious teachings and life philosophies passed down from

generation to generation remain vibrant and relevant. Javanese as a medium of instruction sustains Javanese cultural identity while enriching religious understanding among the younger generation. By learning Javanese and classical texts, students not only acquire linguistic skills but also absorb ethical, moral, and spiritual values. This contributes to character building and a deeper appreciation of religious life. Pesantren and schools play an essential role in ensuring that these teachings are delivered in a manner that is accessible and meaningful to the younger generation. Javanese serves as an important tool in preserving and teaching religious values to the youth. Through its use in pesantren, schools, and the study of classical texts like Serat Centhini and Serat Wedhatama, Javanese ensures that the rich spiritual teachings and life philosophies remain relevant and comprehensible to future generations. This not only safeguards Javanese cultural heritage but also enriches the spiritual life of Javanese society.

This study aims to understand how religious aspects in the Javanese language are expressed and preserved through a sociopragmatic approach. The sociopragmatic approach will be used to analyze how language is employed in social contexts and how religious meanings are maintained in everyday interactions. By understanding these dynamics, this research is expected to provide deeper insights into the role of the Javanese language in the religious life of communities in Java, particularly in Central Java, East Java, and Yogyakarta.

Methodology

A qualitative approach is employed in this study, using a sociopragmatic method as the analytical framework. The data collection for this study includes Direct observation in the community environments of three provinces: Central Java, East Java, and Yogyakarta. The analysis aims to understand the use of vocabulary, sentence structure, and expressions that carry religious meaning. These documents are obtained from libraries, pesantren, and personal collections of religious figures. The participants in this study include various community groups from Central Java, East Java, and Yogyakarta, who are actively involved in religious activities.

Results and Discussion

The Use of Javanese in Religious Contexts

Javanese is used in various religious contexts, ranging from daily prayers, traditional rituals, to major religious ceremonies such as Sekaten and Grebeg. The use of Javanese in these contexts often showcases distinct choices of words, expressions,

and sentence structures laden with religious meaning (Wulandari & Nurdiati, 2023). Daily prayers are a common practice among the Javanese community. Prayer is an integral part of their religious life (Pamungkas et al., 2024). In daily prayers, Javanese is used to convey requests, gratitude, and hopes to God. The use of Javanese in prayer reflects distinct word choices and expressions filled with politeness and respect (Sumbulah et al., 2022). For example: Morning and Evening Prayers, which are recited in the morning and evening, often use the refined and respectful Javanese Krama language form. The sentences in these prayers are typically short yet rich in religious meaning, such as "Mugi Gusti paring berkah lan kaslametan" (May God grant blessings and safety). Another example is Prayers at Family Events, where in events like tahlilan or selamatan, prayers are often led by a religious leader or an elder family member. These prayers use Javanese rich in religious terms and traditions, such as "ngaturaken sembah nuwun" (expressing gratitude) and "nyuwun pangapunten" (asking for forgiveness).

Traditional rituals are a tangible manifestation of the integration between traditional beliefs and formal religions. Javanese is used in various traditional rituals to express deep religious meanings. One example of a traditional ritual that uses Javanese is Ruwatan, a ceremony performed to cleanse oneself from bad luck. The Javanese language used in Ruwatan often consists of mantras and specific prayers believed to possess spiritual power (Muharrom et al., 2023). For instance, "Kersaning Hyang Widhi" (by the will of God Almighty). Another traditional ritual is Tingkeban, a ceremony for pregnant women who reach seven months of pregnancy. In this ceremony, Javanese are used to convey prayers for the safety of both the mother and the baby. These prayers are typically delivered by a midwife or local religious figure using Javanese Krama to show respect and the sacredness of the ceremony.

Major religious ceremonies such as Sekaten and Grebeg are significant events in the religious calendar of the Javanese community. The Javanese language used in these ceremonies reflects the richness of tradition and religious values (Suroso & Rohmadi, 2023). Sekaten is a ceremony celebrated to commemorate the birth of the Prophet Muhammad SAW. Javanese is used in various parts of the event, ranging from official announcements, prayers, to tembang (songs) accompanying the gamelan music. For instance, tembangs like "Ilir-ilir" contain moral and religious messages. Grebeg is a celebration held to mark important Islamic holidays such as Eid al-Fitr, Eid al-Adha, and the Prophet's birthday. Javanese is used in the processions and prayers recited during the ceremony. For example, prayers delivered by the Sultan or royal officials use Javanese with great respect and politeness, such as "Pangeran paring rahayu lan berkah" (May God grant safety and blessings).

Javanese is also used in religious teachings at Javanese pesantren (Islamic boarding schools). Ancient texts written in Javanese often serve as primary teaching materials (Zuhri, 2022). For instance, the Kitab Primbon is a book that contains predictions and life guidelines based on the calculation of days, months, and years in the Javanese calendar. The Javanese used in this text is filled with symbolism and religious terminology. Another example is the Serat Wedhatama, a text that contains teachings on morals and ethics, written by Mangkunegara IV. The Javanese language in this text uses a high level of language (krama inggil) to convey respect and the nobility of its teachings.

The use of Javanese in religious contexts often reveals distinct characteristics in sentence structure and word choices (Putro et al., 2021). One of these characteristics is Tingkat Tutur (levels of speech). Javanese has various levels of speech (ngoko, madya, krama) that are used according to the context and the person being addressed. In religious contexts, the krama and krama inggil levels are often used to show respect and sacredness. Another distinguishing feature is the use of specific expressions. Javanese has many special expressions used in prayers and religious rituals, such as "mugi-mugi" (hopefully), "dumateng" (to), and "ingkang Maha Agung" (The Most Glorious).

Javanese plays an important role in religious contexts, including daily prayers, traditional rituals, and major religious ceremonies. The use of Javanese in these contexts not only showcases the cultural and religious richness of the Javanese community but also reflects how this language serves as a medium to convey spiritual values and preserve religious traditions passed down through generations. Through a sociopragmatic analysis, this study aims to reveal the depth of meaning and the use of Javanese in the religious life of the community in Central Java, East Java, and Yogyakarta.

The Influence of Kejawen Belief and Islam

The Javanese community in the provinces of Central Java, East Java, and Yogyakarta has religious traditions influenced by both Kejawen (Javanese mysticism) and Islam. The influence of these two belief systems is clearly reflected in the use of the Javanese language, both in prayers, mantras, and in traditional ceremonies and religious rituals.

Kejawen is a belief system that combines elements of animism, Hindu-Buddhism, and Islam, creating a unique religious tradition (Al Amin et al., 2020). Kejawen has various rituals and practices that use the Javanese language as the primary medium to convey spiritual values and religious meanings. The Javanese

language in Kejawen mantras and prayers often uses expressions rich in symbolism (Pamungkas et al., 2024). For example, in the mantra "Tirta Kamandanu" (the sacred water of Kamandanu), the term "tirta" (water) carries the meaning of purity and spiritual cleansing. Kejawen prayers are often delivered in Javanese Kawi (Old Javanese), which enhances the sacredness and mystery of the ritual. An example of a prayer like "Manunggaling Kawula Gusti," meaning the unity of the servant with God, reflects the mystical concept within Kejawen. In traditional rituals such as "Tingkeban" (a ceremony for a seven-month pregnancy) or "Tedhak Siten" (a ceremony when a child first steps on the ground), Javanese is used to express prayers and hopes for safety and blessings. For example, "Mugi rahayu lan slamet" (may you be safe and prosperous). The "Ruwatan" ceremony, aimed at removing bad luck, also often uses mantras in Javanese that blend elements of Hindu-Buddhism and Kejawen.

Islam, which is the majority religion in Java, has had a significant influence on the Javanese language and culture (Tohe, 2021). Arabic terms and Islamic concepts have been adapted into Javanese, creating a rich fusion of local traditions and Islamic teachings. Many Arabic terms have been absorbed into the Javanese language, especially in religious contexts. Examples include "sholat" (prayer), "puasa" (fasting), and "ngaji" (reciting the Quran). The use of these terms demonstrates the deep integration of the Javanese language with Islamic teachings. Islamic prayers spoken in Javanese often include Arabic words that are adopted and adjusted to the structure of the Javanese language. For example, the prayer "mugi-mugi paring rahmat lan berkah" (may Allah grant mercy and blessings). Major religious ceremonies such as Maulid Nabi, Idul Fitri, and Idul Adha in Java are often blended with Javanese cultural elements. For example, during the Sekaten celebration, Javanese gamelan music is played, and Javanese songs praising the Prophet Muhammad SAW are sung. The "Grebeg" procession, held in Yogyakarta and Surakarta during major Islamic holidays, uses Javanese language in official speeches and prayers. The Sultan or royal officials deliver prayers in Javanese mixed with Arabic terms, showing respect for both Islamic traditions and Javanese culture.

Javanese society often blends elements of Kejawen and Islam in daily life. The use of the Javanese language in everyday religious practices reflects this syncretism (Ajie et al., 2023). In daily prayers, people often mix Javanese and Arabic. For example, "Bismillah, mugi Gusti Allah paring berkah" (In the name of Allah, may God grant blessings). In religious study sessions or tahlilan (memorial prayers), the recitation of prayers and dhikr is done in Arabic, but the explanations are given in Javanese to ensure a deeper understanding. Expressions such as "Alhamdulillah" (praise be to God) and "InshaAllah" (if Allah wills) are often used in everyday conversation, but

with a Javanese introduction, such as "Alhamdulillah, kula sehat-sehat" (Alhamdulillah, I am in good health). Javanese is used to explain Islamic concepts to children and the younger generation, ensuring that religious teachings are well understood within the local cultural context.

The influence of Kejawen beliefs and Islam on the Javanese language is highly significant, creating a unique and rich blend of local traditions and religious teachings. In a religious context, Javanese functions not only as a tool for communication but also as a medium for conveying spiritual values and preserving cultural heritage passed down through generations. This research demonstrates how the Javanese community integrates elements of Kejawen and Islam in their language and religious practices, creating a distinctive form of religiosity deeply rooted in local culture.

The Role of the Javanese Language in Religious Education and Learning

In schools and pesantren (Islamic boarding schools) in Central Java, East Java, and Yogyakarta, Javanese is often used as the medium of instruction for religious teachings. Ancient texts written in Old Javanese or Middle Javanese are still taught to understand the religious teachings and philosophy of the Javanese people. This demonstrates that Javanese plays an important role in preserving and imparting religious values to the younger generation.

Pesantren is a traditional Islamic educational institution in Java that combines religious education with local culture (Isbah, 2020). In pesantren, Javanese is used in various aspects of religious teaching (Gumelar & Saddhono, 2024). Classical Islamic texts, such as Tafsir Al-Jalalayn or other Kitab Kuning (yellow books), are often taught using Javanese as the language of instruction. For instance, the Tafsir Al-Jalalayn is translated and explained in Javanese to help students (santri) better understand its content. The use of Javanese to explain these texts helps link Islamic teachings with the local cultural context, making them more relevant and easier for the students to grasp. Some pesantren also use texts written in Old Javanese or Middle Javanese to teach moral values and ethics. Books like Serat Wedhatama and Serat Wulangreh contain teachings rich in life philosophy and morality. The Serat Wedhatama, for example, imparts wisdom and good manners through songs and advice that remain relevant to modern life. This text is often taught through reading and understanding the texts, followed by discussions of their meanings in Javanese.

In schools in Central Java, East Java, and Yogyakarta, Javanese is also included in the curriculum as a mandatory subject. This is part of the context of teaching religion and cultural values (Wulandari & Nurdiati, 2023; Saputra et al., 2024). In Islamic Religious Education classes, Javanese is often used to explain basic Islamic concepts.

For example, teachers may explain the pillars of Islam and the pillars of faith in Javanese to make it easier for students to understand. Stories from the lives of the prophets and Islamic history are also told in Javanese, helping students connect religious values with their own culture and traditions. Javanese is used to teach values related to religion and tradition, such as respect for parents (unggah-ungguh), mutual cooperation (gotong-royong), and community togetherness. These lessons are often delivered through folktales, songs, and proverbs, which are rich in meaning and moral teachings.

Javanese plays a crucial role in preserving religious values passed down from generation to generation (Aristiyanto et al., 2023). In religious ceremonies such as tahlilan, study groups, and selamatan, Javanese is used to convey prayers and advice. This helps maintain the authenticity of traditions and strengthen religious and cultural identity. For instance, during tahlilan ceremonies, prayers and dhikr are often recited in Javanese, creating a solemn atmosphere filled with religious significance. Traditional songs (tembang) and Javanese literature containing religious and moral teachings are taught in schools and pesantren. For example, the Macapat song is used to teach about life and religious teachings through songs and poems filled with meaning. Javanese literature such as Serat Centhini and Serat Wulangreh contains life advice and spiritual teachings that are taught to students to enrich their knowledge of religious and cultural values.

Javanese is not only taught in formal educational institutions but also used in everyday life as a means to apply and internalize religious teachings and moral values (Rohmadi et al., 2023). Religious expressions in Javanese, such as "alhamdulillah" (praise be to God), "insya Allah" (if God wills), and "mugi-mugi" (hopefully), are frequently used in daily conversations. This demonstrates how Javanese helps maintain religious awareness in everyday life. Parents in Java often teach prayers and religious stories to their children in Javanese. This helps children understand and internalize religious values from an early age. The tradition of storytelling in Javanese, including stories from Islamic history and local legends, helps instill moral and religious values in children.

Dialect Variations and Their Influence on Religious Meaning in Javanese

Javanese has several dialects that vary across regions, such as the dialects of Central Java, East Java, and Yogyakarta. These variations influence religious expressions in Javanese, in terms of word choice, sentence structure, and levels of formality. However, the core of the religious message remains preserved and consistent across these dialects. For instance, in Central Java, the Javanese language

tends to be more formal and respectful, with a strong emphasis on etiquette, while in East Java, Javanese is used in a more flexible and dynamic manner. Despite these differences, the essence of the religious message remains intact across these dialects.

The Central Javanese dialect is known for its formal and polite usage. The Javanese language in this region tends to employ krama (polite speech) and krama inggil (very polite speech), especially in religious contexts and traditional ceremonies (Udasmoro et al., 2023). Prayers and mantras in the Central Javanese dialect are often delivered using krama to convey respect and sanctity. For example, in the prayer "Mugi Gusti paring berkah lan rahayu" (May God grant blessings and safety), the use of words like "mugi" and "paring" reflects a high level of politeness. Traditional ceremonies such as "Tingkeban" and "Tedhak Siten" use krama to express prayers and hopes, enhancing the religious and sacred atmosphere. Religious expressions in the Central Javanese dialect, such as "nyuwun pangapunten" (asking for forgiveness) and "atur sembah nuwun" (expressing gratitude), reflect a high level of courtesy and respect. In gatherings like pengajian (Islamic study) and tahlilan, krama is used to recite prayers and dhikr, creating a solemn and respectful atmosphere.

The Yogyakarta dialect also uses Javanese krama, but with distinctive local variations. Javanese in Yogyakarta is known for its refinement and politeness, as well as its richness in religious and philosophical expressions (Saddhono & Hartanto, 2021). In religious education in Yogyakarta, Javanese is used to explain religious concepts in a gentle and respectful manner. For example, when explaining the pillars of Islam, teachers will use krama to ensure respect for the teachings of religion. Texts such as Serat Wedhatama are taught in Javanese krama to impart moral and spiritual values to students. In religious rituals and ceremonies such as the "Sekaten" and "Grebeg" ceremonies in Yogyakarta, Javanese krama is used in prayers and official speeches. This reflects the integration of royal traditions and Islamic teachings, with Javanese krama as the bridge. In rituals like "Tahlilan," Javanese krama is used to convey prayers and praises, creating an atmosphere full of respect and solemnity.

The East Javanese dialect is more flexible and dynamic compared to the Central Javanese and Yogyakarta dialects. The use of Javanese ngoko (informal) and madya (medium) is more common, although in religious contexts, a level of formality is still maintained (Ekawati & Katrini, 2022). In daily life, the people of East Java may often use ngoko or madya, but in religious contexts and rituals, they switch to krama to show respect. Daily prayers and dhikr might be simpler in structure, but they still retain deep religious meaning. For example, "Gusti paring rahmat lan berkah" (God grants grace and blessings). In traditional ceremonies such as "Ruwatan" or "Selamatan," Javanese madya or krama is used depending on the level of formality of

the event. The use of this language shows the flexibility and adaptation of the East Javanese dialect in various religious contexts. Expressions like "mugi-mugi" (hopefully) and "nyuwun pangapunten" (asking for forgiveness) continue to be used to convey prayers and hopes, adjusted to the local dialect.

Despite variations in the use of dialects, the core of religious messages remains consistent across regions. Religious terms from Arabic, such as "Allah," "Rasul," and "Al-Quran," are used consistently across dialects, helping to maintain the unity of meaning in religious teachings. Prayers and dhikr that include Arabic words remain the same across dialects, with only the delivery potentially differing depending on the level of formality of the Javanese language used. Moral and ethical teachings conveyed through Javanese are also the same, despite dialectal variations. For example, concepts such as "gotong-royong" (cooperation) and "unggah-ungguh" (etiquette) are taught across all regions with local dialect adjustments. The teaching of texts like Serat Wedhatama and Serat Wulangreh, which contain religious and philosophical values, remains relevant in all dialects, ensuring that moral and spiritual messages are well received by all Javanese communities.

The dialectal variations in Javanese language add unique color and richness to the religious expressions of the Javanese people in Central Java, Yogyakarta, and East Java. Despite differences in the use of language levels and word choices, the essence of religious messages remains intact. The use of krama language in formal and ritual contexts, along with the adaptation of language in daily life, demonstrates the flexibility and dynamism of Javanese. Thus, Javanese language serves as an important tool in preserving and spreading religious values within society, ensuring that traditions and religious teachings remain alive and relevant in everyday life.

Conclusions

The religious aspects of the Javanese language reflect the beliefs and religious practices of the Javanese people in Central Java, East Java, and Yogyakarta. Through a sociopragmatic approach, this study reveals that Javanese language is not only a tool for communication but also a means of preserving and conveying rich religious values. The variations in dialects and the use of language in religious contexts demonstrate that Javanese possesses remarkable flexibility and cultural richness. In religious rituals, such as slametan or tahlilan, Javanese is often used to express prayers and respect for ancestors. Religious expressions, such as "mugi rahayu" or "paringan berkah," reflect hopes and petitions to God with profound spiritual nuances. Moreover, ancient Javanese literary texts, such as serat and kidung, contain moral and spiritual teachings that remain relevant to this day. The Javanese language also plays an important role in teaching religious values through oral traditions, such as tembang

macapat. In daily interactions, the use of speech levels, such as krama and krama inggil, reflects respect for social hierarchies, which are also grounded in religious values. Thus, the Javanese language is not only a reflection of culture but also a medium that connects society with the spiritual teachings they adhere to.

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Ethical Considerations

This study was conducted in accordance with ethical standards. Prior to data collection, informed consent was obtained from all participants to ensure their voluntary participation. The confidentiality and anonymity of all respondents were strictly maintained throughout the research to protect their privacy and well-being.

Conflicts of Interests

The authors declare that there is no conflict of interest related to this research, "Religiousness in Javanese Language and Culture Communication: A Sociopragmatic Study in Java Island, Indonesia." This research was conducted independently, and no external parties influenced the study's design, implementation, or conclusions. Furthermore, no financial or personal relationships could influence the findings presented in this article.

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Article

The Filipino Idea of the "Sacred" in the Context of Personalism as Man Prepares to His End

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Abstract

This study explores the deep-rooted spirituality of the Filipino people, focusing on their unique relationship with the sacred and the concept of a personal God. Drawing from a range of historical, philosophical, and contemporary sources, it investigates how early Filipino beliefs, unconscious religiousness, and practical personalism continue to shape everyday expressions of faith. Filipinos often encounter the divine in tangible ways—through objects, places, and rituals—manifesting what scholars refer to as hierophanies. To interpret these lived experiences and symbolic practices, the study employs a Philosophical-Hermeneutic Methodology, combining existential and personalist thought with interpretive analysis of cultural texts and religious traditions. This approach emphasizes reflective inquiry rather than empirical data collection, allowing for a nuanced understanding of practices such as the use of anting-anting (amulets), which reveal the enduring fusion of indigenous spirituality and Catholic influence. Ultimately, the study highlights how Filipino spirituality, grounded in both ancient traditions and contemporary practices, offers a rich lens for understanding the broader dynamics of faith, culture, and personal religiosity in the Philippines.

Keywords: *Afterlife; Culture, Filipino Spirituality; Hierophany; Personalism*

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Introduction

Humanity has long grappled with the inescapable reality of mortality. The awareness of death—its inevitability and the prospect of its onset—is a phenomenon that, though difficult to accept, shapes much of human behavior. This realization of mortality is deeply intertwined with the belief in something beyond the self, a transcendental entity that provides a sense of purpose and direction. However, awareness of mortality does not necessarily equate to religious engagement. As Aquino (1993) asserts, "the objective manifestations of religion alone do not constitute religion" (p. 3), highlighting the complexity of religious experience beyond observable practices. For Leibniz (Cave, 2009), the belief that there must be a sufficient reason for everything marks the zenith of human rationality, suggesting that belief in a higher power is a natural consequence of human reasoning.

Within each individual lies an innate sense of indebtedness to a being beyond oneself—a being that invokes both reverence and fear. This sense of indebtedness compels individuals to prepare for an encounter with the transcendental, which is often conceptualized as a supreme entity. In this regard, the philosophical arguments of St. Thomas Aquinas, particularly his fourth proof of God's existence—the concept of gradation—suggest that the most noble being serves as the cause of all other beings (Aquinas, 1969, p. 285). This "supreme entity," central to the human experience, serves as both a source of existential reflection and a guiding force for moral and spiritual actions.

As individuals anticipate their eventual encounter with this divine being, they engage in practices that they believe will enable them to stand worthy before it in the afterlife. This preparation occurs in the present through acts of devotion and reverence toward representations of the divine, which may include objects, rituals, persons, and incantations. In this study, such representations are collectively referred to as the "sacred."

In the Filipino context, belief in a supreme being is deeply ingrained, often accompanied by the fear of divine retribution for human imperfection. This fear drives a pattern of reverence in daily life, influencing both behavior and spiritual practices. This study seeks to explore the Filipino attitude toward the sacred, with particular attention to the concept of personalism, which emphasizes the affirmation of human freedom and the personal nature of religious belief. Filipino personalism, as described by Padilla (2008), underscores the importance of a personal relationship with the divine, particularly with a personal God, which is a hallmark of Filipino spirituality (p. 196). This approach to the divine highlights not only the relationship between

individuals and God but also how these beliefs are expressed in both ordinary and extraordinary ways.

The concept of the sacred is neither foreign nor extraordinary to Filipinos. Each person holds a personal interpretation of what is sacred, often associating it with divine or magical qualities. Aquino (1993) contends that Filipino personalism involves "not a compelled perception, but a voluntary act of interpretation" (p. 32), illustrating the fluidity and subjectivity of sacred beliefs. This perspective on the divine is accompanied by an "unconscious religiousness," which Frankl (2000) identifies as the compelling force that drives individuals to devote time and attention to sacred representations of the divine (p. 67). Whether or not the existence of a supreme entity is accepted as an absolute truth, it is the behavior toward this belief that shapes daily life and spiritual practices.

In Filipino culture, the desire to please a divine entity, seeking protection and guidance for both the present life and the afterlife, reflects a psychological need for dependency and protection (Estoque et al., 2006, p. 163). The practices that aim to appease the divine—through rituals, devotion, and reverence of sacred objects—serve as expressions of this psychological and spiritual need. These practices, including superstitions, occult rituals, and the veneration of religious artifacts, can be understood as "hierophanies," or manifestations of the sacred in the material world. Such practices are not simply acts of devotion; they are deeply intertwined with the human quest for security and transcendence.

This study aims to trace these practices to their historical and cultural roots, examining not only the colonial influence on Filipino religious life but also the indigenous spiritual practices that continue to shape Filipino attitudes toward the sacred. To fully appreciate the depth of this religious landscape, we must look beyond the colonial past and examine the underlying beliefs and practices that persist to this day, offering valuable insight into the ways in which Filipinos understand and prepare for their ultimate encounter with the divine.

Personalism

Personalism, as a philosophical concept, refers to the quality of being characterized by individual, personal modes of expression and behavior (Pickett, 2011). It represents how a person engages with and responds to the world around them. Philosophically, personalism is understood as a system in which the person is the ontological ultimate, and personality serves as the fundamental explanatory principle (Edwards, 1967, p. 107). In this framework, God is perceived as a fully personal being, allowing believers to relate to the divine in human terms. This

perspective enables the depiction of God as a loving and caring entity, whose nature can be conveyed through images drawn from human experiences (Edwards, 1967, p. 347).

Personal idealism, a form of personalism, emerged in the late nineteenth and early twentieth centuries at Boston University, primarily through the work of Borden Parker Bowne (1847–1910) and his followers, including Knudson, Flewelling, and Brightman. These scholars were pivotal in establishing personalism as a philosophical tradition (Audi, 1995). Central to this system is the belief that God, as a personal being, is intimately accessible to humanity, transcending religious traditions. The personalist viewpoint allows believers to engage with God in human terms, perceiving His presence in everyday life. Within this framework, God is understood as the transcendent person, the creator, and sustainer of all other persons, while the material world is regarded as a system of objects created for or by persons (Audi, 1995, p. 575).

Personalism can be categorized into two primary forms: realistic personalism and idealistic personalism. Realistic personalism, grounded in supernaturalism and metaphysical realism, holds that personality is the essence of being and that ultimate reality is spiritual and supernatural. In this view, while God is the source of all existence, not all creation is inherently personal or spiritual (Edwards, 1967, p. 108). Conversely, idealistic personalism aligns with metaphysical idealism, with three main subtypes: absolutistic idealism, panpsychistic idealism, and personal idealism. The latter, personal idealism, is the most representative of the personalist tradition, asserting that all of reality is personal, consisting of a society of persons, with God as the supreme person and the ultimate source of all beings (Edwards, 1967, p. 108).

Filipino Personalism

Filipino personalism is a distinct expression of religious belief in which Filipinos deeply internalize and personalize their relationship with God. This relationship is reflected in various religious practices, rituals, and the veneration of sacred objects, which serve as tangible manifestations of the divine presence. Filipinos, influenced by their cultural heritage, tend to think holistically and concretely (Mercado, 1979). This approach is evident in their strong belief in a higher being, reflecting an existential orientation where "being human always relates and points to something other than itself—better to say, something or someone" (Frankl, 2000, p. 138).

Filipino personalism encompasses both realistic and idealistic dimensions. Realistic personalism is seen in the deep religiosity of many Filipinos, who believe in a spiritual reality beyond this life. This belief is manifest in practices such as the use of

agimat (amulets), relics, and religious rituals, all of which serve to bring them closer to God and prepare them for life after death. These objects are revered not only as sacred but also as sources of protection, luck, and divine presence, which aligns with the belief that "ultimate reality is a spiritual, supreme being" (Edwards, 1967, p. 108).

On the other hand, Filipino personalism also exhibits features of idealistic personalism, particularly in the form of personal idealism. Filipinos demonstrate a sentimental attachment to objects, especially those given by loved ones, reflecting an idealistic orientation. They also place significant value on community, extended family relationships, and social belonging, indicating their pluralistic worldview. This communal and relational focus is a key component of Filipino spirituality. Their theism, expressed through deep devotion to God, often portrays God as the ultimate source of being and blessings. Even individuals who do not practice formal religion may still live in anticipation of a final judgment, recognizing a higher being who presides over their fate.

Although realistic and idealistic personalism may appear to be distinct forms of belief, both are present in Filipino religious life. Their coexistence demonstrates how belief and practice are intricately integrated into Filipino spirituality. The idealism that leads Filipinos to form deep relationships and attach profound meaning to objects and experiences also encourages them to accept spiritual realities. This integration results in a lived expression of personalism that is both idealistic in thought and realistic in practice.

To capture this unique synthesis, this study introduces the term practical personalism. This term seeks to describe how Filipino personalism blends both realistic and idealistic elements in a culturally embedded, lived experience. The term is not derived from existing literature but is coined specifically for this study to describe a distinctive cultural phenomenon. While similar terminology may exist elsewhere, this term is used to name the cultural reality observed in Filipino religious life—where beliefs are not only held but are actively manifested in everyday practices.

Methodology

This study adopts a Philosophical-Hermeneutic Methodology to examine the lived spirituality of the Filipino people, focusing on their deep relationship with the sacred and their personal experience of the divine. The philosophical dimension draws from existential and personalist thought—particularly the works of Karl Jaspers, Gabriel Marcel, and key Filipino thinkers—providing a framework to interpret how Filipinos understand their connection with a personal God, the afterlife, and the sacred as a tangible presence. Through this lens, concepts such as practical personalism,

unconscious religiousness, and hierophany are examined not merely as abstract ideas but as lived realities embedded in Filipino culture and religious life.

The hermeneutic aspect involves the interpretation of diverse sources, including historical accounts, theological reflections, cultural studies, and ethnographic literature that reveal how Filipino spirituality is practiced and embodied. Emphasis is placed on symbolic elements—such as the use of anting-anting (amulets), devotional practices, and sacred objects—which are understood as manifestations of the sacred or hierophanies. Rather than generating empirical data, the study engages in deep textual and cultural analysis to uncover the meanings behind Filipino religious expressions. This interpretive process allows for a nuanced understanding of Filipino spirituality as an integration of faith, culture, and personal relationship with the divine—a spirituality that continues to shape Filipino identity and worldview.

Findings

The findings of this study emerge from a reflective and interpretive engagement with Filipino spiritual practices, viewed through the lens of philosophical-hermeneutic inquiry. Rather than presenting empirical data in the traditional sense, the discussion unfolds by interpreting the symbolic, cultural, and religious expressions that reveal the Filipino people's unique relationship with the sacred and their personal God. Drawing from historical texts, cultural artifacts, theological writings, and philosophical insights, this section presents an integrated analysis of how concepts such as hierophany, practical personalism, and unconscious religiousness are embodied in everyday life. These findings are not isolated observations but interconnected insights that offer a deeper understanding of how faith is experienced, lived, and expressed in Filipino culture.

Filipinos and the Supreme Entity

Ancient Beliefs and Traditions

The Philippines boasts a rich cultural and religious heritage, shaped by various civilizations long before colonial rule. Indigenous Filipino traditions and superstitions were deeply ingrained in society even prior to Spanish colonization. Despite enduring foreign invasions—by the Spanish, American, and Japanese—the early Filipinos exhibited a distinct and sophisticated form of civilization. Unfortunately, much of this indigenous culture, particularly religious artifacts and practices, was destroyed by missionaries, especially friars, evangelical priests, and pastors. As Zaide (1994) observes, the destruction of these relics severely hampers our understanding of pre-colonial Filipino religious life.

Anthropologically, Filipinos are part of the Malayan race, sharing cultural similarities with neighboring Southeast Asian civilizations. Trade relations with advanced civilizations such as India, China, and Arabia introduced not only goods but also religious ideas and spiritual practices (Madeja et al., 1991). Trade also extended to other Asian territories, including Borneo, Malaya, Siam (Thailand), Cambodia, Java, Celebes, and Sumatra. These interactions helped shape the early Filipino understanding of the divine, influencing the development of sacred objects and worship rituals.

A profound belief among ancient Filipinos was their reverence for the afterlife. Their dedication to proper burial practices illustrates this: "Because of their belief in the next world, the early Filipino took care in burying their dead" (Madeja et al., 1991, p. 41). Agoncillo (1990) further explains that ancient Filipinos believed the dead needed material possessions for a favorable reception in the afterlife, ultimately to meet Bathala, the supreme deity. This belief is symbolized by artifacts such as the Manunggul Jar, which depicts the soul's journey to the next life.

Superstitions were also integral to Filipino spirituality, often intertwined with personalism. Zaide (1994) documented numerous supernatural beliefs and mythological creatures that influenced everyday life, such as the asuang (a witch capable of shape-shifting into animals to devour human flesh), the mangkukulam (a witch who causes illness by pricking dolls), and the tigbalang (a deceiver appearing as an animal or old man) (p. 70). Additionally, Filipinos believed in the power of amulets (anting-anting), love potions (gayuma), invisibility herbs (odom), and charms for safe river crossings (uiga). While some of these superstitions persist today, they illustrate how early Filipinos personalized their spirituality by seeking a connection with a divine or supernatural entity through ritual and tradition.

Unconscious Religiousness

Even before the introduction of organized religion, pre-colonial Filipinos exhibited an intrinsic orientation toward the divine. Though they worshiped gods they had conceived and feared, their belief system reflected an inherent longing for a transcendent being. Frankl (2000) described this as an "unconscious religiousness," wherein the immanent self relates to a transcendent Thou. For Filipinos, belief in a supreme entity was a means of explaining daily life and natural phenomena. Philosopher David Hume (1993) argued that religions evolve from polytheistic origins toward monotheistic understandings, shaped by fear, reverence, and the human need for explanation. He observed that: "The first conception of gods as powerful but limited beings... gives way to a conception of deity as unity and infinity... But these

conceptions prove too remote... and demi-gods or intermediaries are introduced again" (p. 194).

This shift from polytheism to monotheism illustrates the natural human tendency to seek a deeper understanding of a transcendent being. Even without formal theology, Filipinos were guided by a moral and spiritual sense, suggesting the presence of what Frankl (2000) refers to as the "unconscious God"—a God not unconscious in Himself, but unknown to humanity. Wojtyła's (Francisco, 1995) personalism further emphasizes that humans, endowed with intellect and will, are capable of making moral decisions and freely relating to God. This "unconscious religiousness" underscores humanity's innate quest for truth and the establishment of a personal connection with the divine.

Religion

Although no formal religious system existed among early Filipinos, they were inherently religious and acknowledged multiple gods and goddesses. This inclination toward religion was shared by many ancient civilizations, driven by the belief that divine power governed both good and evil (Glover, 1996). These early systems were often classified as paganism, where belief in a being took precedence over belief that a being existed (Thompson, 2010).

Religion can be broadly defined as "the belief in and reverence for a supernatural power or powers, regarded as creating and governing the universe" (Pickett, 2000). In Catholicism, it is understood as a relationship between God and humanity, involving specific teachings and practices that unite people with God (Bennet, 2011). The personalization of religion often occurs as individuals conceptualize their deity based on personal faith and experience (Casas, 2011).

Hume (1993) posited that polytheism was likely the first form of religion, given the widespread evidence of early polytheistic belief systems and the improbability that primitive societies initially embraced monotheism, only to abandon it later. Regardless of the form, all human societies are naturally inclined toward religion as a recognition of human dependence on a higher being (Bennet, 2011). Even outside formal religious structures, people are compelled to seek truth and purpose through spiritual inquiry (Casas, 2011). Glenn (1930) emphasized that religion should not be treated merely as a utility but as a moral duty rooted in human rational nature.

Ancient Religious Practices of the Filipinos

Before colonization, the dominant belief systems in the Philippines were animistic and polytheistic, with localized deities and rituals. Although Catholicism

and Islam became the predominant religions in the region, elements of pre-colonial paganism, occultism, and newer spiritual practices persist. Filipinos traditionally worshiped individually or communally, often guided by a presbys (elder or priest), and performed rituals in designated spaces (Bauzon, 2011). According to Spanish missionaries, Filipinos already believed in a supreme being before the arrival of Christianity. Fernandez (1979) noted that "before the arrival of the missionaries, Filipinos already believed in a supreme being, which the Tagalogs called Bathala Maykapal, the Visayans Laon, and the Ilocanos Cebunian. Bathala was the creator and judge but was perceived as distant and unconcerned with daily affairs" (p. 1). To meet their immediate needs, Filipinos turned to secondary deities—gods associated with rivers, mountains, trees, and villages, resembling the Greco-Roman pantheon (Fernandez, 1979). Additionally, Filipinos practiced animism, attributing spirits to natural elements such as the sun, moon, and animals. Crows were called Maylupa (lords of the land), crocodiles were revered as Nono (grandfather), and bamboo was considered sacred (Fernandez, 1979). Religious spaces were simple, such as lean-tos called simbahan or designated rooms in wealthier homes, which housed images of gods or anitos. Worship also occurred in groves and forests (Fernandez, 1979). Despite their lack of knowledge of the Christian God, early Filipinos' religious instincts reveal a rational acknowledgment of divine power, aligning with characteristics of the God later revealed through Christianity.

The Sacred

Hierophanies

In religious studies, the concept of the sacred refers to material objects or events that, while not divine in themselves, serve as representations or manifestations of the divine. These objects or occurrences are considered sacred because they are believed to make the divine present in the world. The divine or supreme entity is transcendent and not a material object; however, certain objects or events can facilitate encounters with the divine. This process is known as hierophany, derived from the Greek terms hieros (sacred) and phania (manifestation). Hierophanies thus refer to the revelation of the sacred in the ordinary, or the manifestation of the divine in the mundane.

Related to hierophanies is the concept of the hierophant, which originates from ancient Greek religious practices. The hierophant was a priest who interpreted and revealed sacred mysteries, particularly in the Eleusinian rites. In modern terms, a hierophany refers to any material or event that evokes the sacred, such as sacred texts, statues, or natural phenomena. These manifestations of the sacred are central to the religious life of people, helping them experience a connection to the divine.

Hierophanies are present in all religions, serving as conduits to the divine. Examples of such hierophanic objects include sacred stones, idols like the avatars of Vishnu, statues of deities such as Jupiter, the theophany at Mt. Sinai, and the incarnation of the Logos in the figure of Jesus Christ. Aquino (1993) categorizes these hierophanies into three broad types:

1. Nature-based hierophanies: These involve natural elements like rivers, mountains, or trees as mediators of the divine.
2. Historical hierophanies: These are events or narratives, particularly national or salvation history, where divine presence is believed to have been revealed (e.g., the Exodus of the Israelites or the life of saints).
3. Personal hierophanies: These are instances where a specific person embodies the divine presence, as in the cases of Christ or Krishna.

These various forms of hierophany help explain why certain objects hold profound significance for believers. It is not that the objects themselves are deified, but rather that they are seen as tangible signs or channels through which the divine may be encountered. While scientific or philosophical explanations may not always suffice, faith—defined as "an act of intellect based on rational motives of credibility"—offers a lens through which these experiences can be understood.

In Filipino religious culture, hierophanies take on a deep and personal meaning. Sacred objects serve not only as symbols but as real, tangible connections to the divine. For Filipinos, the desire for physical representations or symbols that can be held, seen, or touched reflects their need to make the divine more immediately accessible. These physical manifestations of the sacred, whether in the form of images, statues, relics, or sacred rituals, are key to Filipino spirituality.

Catholicism

Catholicism, the predominant religion in the Philippines, significantly shapes the religious landscape. Filipinos are widely recognized for their deep religiosity, and the Philippines is often described as a "Catholic country." However, as Fr. Jose Francisco C. Syquia (2012) notes, despite the nation's Catholic identity, the persistence of superstitions and folk beliefs can sometimes dilute the depth of Catholic devotion, preventing it from being a fully transformative source of holiness and protection.

Filipino Catholic devotion is expressed through practices such as praying novenas, celebrating feasts like the Feast of the Black Nazarene, and maintaining home altars adorned with images of the Sto. Niño and the Blessed Virgin Mary. There is also a unique, affectionate devotion to the Virgin Mary, often referred to as "Mama Mary" or "Ina" (Llasos, 2013). This relationship is central to Filipino spirituality, and the

veneration of sacred objects, such as images and relics, plays an important role in daily life.

The Catechism of the Catholic Church (1994) emphasizes that "the religious sense of the Christian people has always found expression in various forms of piety, including the veneration of relics" (#1674). Relics—whether first-class (parts of a saint's body), second-class (items used by the saint), or third-class (objects touched to a first-class relic)—are treated with great reverence in Filipino culture. The Philippines boasts one of the largest numbers of lay relic custodians, indicating the widespread devotion to these sacred objects (De Leon, 2011).

The veneration of relics is not merely an act of historical preservation but is deeply theological. The Acts of the Apostles recounts how items touched by the Apostle Paul—such as handkerchiefs and aprons—were used to heal the sick (Acts 19:11–12, NAB, 2004). The veneration of relics reflects two theological principles: (1) the resurrection of the saints and (2) their continued intercession on behalf of the living faithful (Komonchak et al., 1991, p. 862). For Filipinos, relics are not simply historical remnants but living connections to God through the intercession of saints, which fosters a deeper bond with the divine and aids in the preparation for eternal life.

New Age Movement

The New Age Movement (NAM) represents a diverse collection of mystical and esoteric practices, many of which are incompatible with Catholic doctrine. The movement often promotes pantheistic ideas of God that conflict with the Catholic understanding of the divine, and it encompasses a variety of spiritual systems, self-help practices, and occult traditions (Clowes, 2001, p. 37). Though difficult to define, NAM includes beliefs in reincarnation, astrology, and alternative healing methods (Pickett, 2000).

In the Filipino context, many individuals, often unknowingly, incorporate New Age practices into their Catholic worldview. These practices include the use of anting-anting (amulets), astrology, animism, and seeking guidance from traditional healers such as albularyo, mangkukulam, and espiritista (Fr. Syquia, 2012, pp. 222–223). Shamanistic practices, in particular, remain prevalent in Filipino culture, where individuals seek healing or guidance from shamans, who are seen as mediators between the human and spiritual realms (Mercado, 2000).

The persistence of these practices is part of a larger trend in Filipino religious life, where ancient beliefs continue to coexist with Catholic teachings. The use of amulets, in particular, reflects the blending of personalism and the sacred in Filipino spirituality. These objects—whether necklaces, stones, or written prayers—are imbued

with spiritual significance, offering protection and empowerment. Despite the modernity of Catholicism, these practices serve as a reminder of the continuity of Filipino spirituality, where the sacred is sought in both the tangible and the intangible.

Discussion

The findings from the review of related literature provide valuable insights into the complexity of Filipino spirituality, particularly their relationship with the sacred and their personal engagement with the supreme entity. These findings underscore the deeply ingrained spiritual practices, beliefs, and ideologies that define Filipino religiosity. By examining key themes such as hierophanies, Catholicism, and the influence of the New Age Movement (NAM), this study sheds light on how Filipino spirituality is shaped by both indigenous and foreign religious traditions, as well as how these practices continue to evolve in modern contexts.

Hierophanies and the Sacred

The concept of hierophanies—the manifestation of the sacred in the profane—emerges as a central theme in understanding Filipino spirituality. Filipinos, like many other religious groups, do not only see the divine in abstract terms but in tangible objects, places, and events. The sacred is embodied in hierophanies, such as statues, relics, and amulets, which hold profound significance for believers. This connection between the divine and the material world reflects a holistic view of spirituality, where the sacred is accessible and can be encountered through physical objects that serve as conduits to the divine. As highlighted in the literature, the veneration of relics in the Philippines is a notable example of this practice. Filipinos' deep reverence for relics—whether first, second, or third-class—serves not only as a historical connection to the saints but also as a means to experience divine grace and intercession. This aligns with the theological notion of sacred history, where the faithful see the divine presence not only in the past but in ongoing sacred acts. The connection between Filipino spirituality and hierophanies is a testament to their lived faith, where sacred objects and events serve as markers of divine presence.

Catholicism and Filipino Devotion

Filipino Catholicism, while rooted in the teachings of the Church, has developed distinct practices and expressions of faith that are uniquely Filipino. The devotion to the Virgin Mary, the celebration of the Feast of the Black Nazarene, and the common practice of maintaining home altars are just a few examples of how Filipino Catholics manifest their faith. These practices, which often involve physical

expressions of devotion such as bowing, kissing relics, or lighting candles, highlight the Filipino tendency to externalize their faith in tangible ways. The Filipino belief in a personal God also contributes to this devotional culture, where faith is experienced through direct, intimate encounters with the divine. However, as noted in the literature, the evolution of Filipino Catholicism is not without its complexities. Fr. Jose Francisco C. Syquia (2012) observes that while the country remains predominantly Catholic, certain superstitious practices and beliefs, such as the use of anting-anting (amulets) or engagement with spirit mediums, have permeated Catholic devotion. These practices, often viewed through a syncretic lens, reveal the ongoing influence of pre-colonial religious beliefs and indigenous spirituality on contemporary Filipino religiosity. This fusion of Catholicism with local traditions demonstrates the adaptability and resilience of Filipino spirituality, as it merges diverse elements into a unique cultural expression of faith.

The New Age Movement and Filipino Spirituality

The review of related literature also highlights the influence of the New Age Movement on Filipino religiosity, especially among those who unknowingly engage in its practices while identifying as Catholic. Fr. Syquia (2012) discusses how practices like astrology, shamanism, and traditional healing are increasingly integrated into Filipino spiritual lives. These elements, drawn from indigenous and esoteric traditions, coexist with Catholic beliefs, creating a complex and multifaceted approach to spirituality. The rise of the New Age Movement in the Philippines reflects a broader global trend but is uniquely shaped by local traditions. For instance, shamanism, with its emphasis on spiritual healing and communication with spirits, remains a significant part of Filipino spiritual practice. Similarly, the anting-anting—amulets thought to provide protection or healing—echoes the influence of pre-colonial animistic beliefs, which continue to play a role in Filipino cultural and religious life. This blend of indigenous practices and foreign spiritual movements speaks to the fluidity of Filipino religiosity, where old and new practices can coexist and inform each other.

Practical personalism and Filipino Spirituality

The concept of practical personalism emerges as a key framework for understanding how Filipinos integrate their faith into daily life. This approach to spirituality emphasizes the personal and practical dimensions of belief, where religious practices are not abstract or theoretical but are deeply embedded in everyday actions. Filipinos express their faith through concrete practices, such as prayer, the use of sacred objects, and acts of devotion, that reflect their ongoing relationship with the

divine. This personalism is not confined to ritualistic practices but extends to how Filipinos live their faith in their daily routines, interactions, and decisions. As the literature suggests, this practical personalism is closely linked to Filipino attitudes toward the afterlife. The belief in an afterlife is not just a theoretical concept but a motivating force that influences how Filipinos live their lives and practice their faith. The dependence on God for guidance, protection, and salvation reflects the Filipino commitment to personal holiness and spiritual growth, as well as the desire to secure a place in the afterlife.

Hence, the research underscores the deeply embedded nature of Filipino spirituality, characterized by a rich interplay of Catholic devotion, indigenous beliefs, and modern spiritual practices. The findings highlight the importance of hierophanies, Catholic devotion, and the influence of the New Age Movement in shaping the religious landscape of the Philippines. Moreover, the notion of practical personalism offers a valuable lens through which to understand how Filipinos integrate their faith into daily life, grounding their spirituality in both the sacred and the everyday. This holistic approach to spirituality reflects the unique ways in which Filipinos engage with their personal God and navigate their spiritual journeys, both in this life and the afterlife.

Conclusions

Filipinos' deep connection to the sacred is central to their spirituality, flourishing especially in moments of solitude, where they reflect not only on their relationships with one another but, more significantly, with their personal God. For Filipinos, the sacred is not a theoretical abstraction; rather, it is experienced as a tangible manifestation of God's presence in daily life. As Jaspers (2006) affirms, "man's self-realization is a fact of man's relatedness to the Deity, the Divine" (p. 62). This relationship shapes Filipino attitudes toward the afterlife, often perceived as a loving compensation offered by God beyond death (Thompson, 2010, p. 177).

Endowed with both an inquisitive mind and a searching soul (Casas, 2011, p. 25), Filipinos naturally seek a profound and personal connection with the divine. Their inherent curiosity and longing for spiritual meaning give rise to a form of religiosity expressed through practical personalism—where faith is not confined to abstract thought but is integrated into daily actions. Filipino spirituality, therefore, is not merely believed; it is lived. The Filipino approach to the sacred offers a compelling model of practical personalism. Through unconscious religiousness, Filipinos encounter divine wisdom in everyday moments. This experience permeates their lives and influences their behaviors, rituals, and interactions. Such devotion is not easily dissected from the outside; it is uniquely personal—understood and lived in ways only the individual and their God can fully comprehend. Hierophanies—manifestations of

the sacred in objects, events, and places—further reflect the Filipino way of relating to the divine. These symbols are not venerated for their own sake but are revered for the divine relationship they enable. In this way, Filipinos encounter the sacred in statues, relics, or significant experiences that facilitate communion with the divine.

Historically, Filipino religiosity has developed from the intimate setting of the home, where religious practices are first nurtured, and then extended into the community (Jose, 1992, p. 13). Objects such as anting-anting (amulets), believed to be blessed by divine power, illustrate the enduring fusion of indigenous beliefs with Catholic traditions. This integration maintains the authenticity and continuity of Filipino spiritual heritage. Despite external interpretations, Filipinos express great pride in their devotion. Their reverence for the sacred is deeply ingrained and instinctive, manifesting as honor for any person, place, or object associated with the divine. As they live in preparation for the afterlife, Filipinos preserve an unwavering spiritual bond with God. While Filipino personalism may elude complete understanding by outsiders, it remains a powerful and embodied expression of faith, deeply intertwined with culture (Aquino, 1993).

Through a philosophical-hermeneutic lens, this study has illuminated how Filipino spirituality—rooted in practical personalism and expressed through everyday hierophanies—provides a distinct and meaningful way of experiencing the divine. This embodied faith, shaped by ancient traditions and evolving contemporary practices, continues to inform Filipino identity and their understanding of the sacred in both this life and the next.

Conflicts of Interests

The author declares that there is no conflict of interest related to this research.

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Article

Ethnic Identity and Cultural Diplomacy of Indian Diaspora in Indonesia

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Abstract

This study examines the role of the Indian diaspora in Indonesia in advancing cultural diplomacy, with a focus on the interplay between ethnic identity, media representation, and cultural integration. The Indian diaspora, historically rooted in regions such as North Sumatra, Aceh, Surabaya, Jakarta, and Bali, has contributed significantly to various sectors, including trade, textiles, manufacturing, and film. However, the community continues to face challenges related to citizenship status, remittances, sociocultural acceptance, and integration within Indonesia's predominantly Muslim society. Using a qualitative research approach, the study employs semi-structured interviews with key diaspora figures, content analysis of media representations, and policy document review to explore how ethnic identity both facilitates and complicates cultural diplomacy between India and Indonesia. Key findings reveal that while the diaspora acts as an effective conduit for India's soft power and cultural exchange, structural limitations constrain their diplomatic potential, such as exclusion from policy-making, cultural stereotyping, and institutional invisibility. The novelty of this research lies in its focus on the intersection of media, mindset, and diasporic cultural practice as strategic elements in public diplomacy. It argues that recognizing the nuanced role of diaspora identity is vital for fostering inclusive cultural diplomacy and enhancing bilateral relations in multicultural settings like Indonesia.

Keywords: *Cross-culture, Cultural Diplomacy, Diaspora, Indian, Indonesia*

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Introduction

India and Indonesia share a long-standing historical relationship rooted in trade, cultural exchange, and religious influence. One of the enduring legacies of this transnational interaction is the presence of the Indian diaspora in Indonesia. Comprising diverse ethnic groups such as Tamil, Gujarati, Punjabi, and Sindhi, the Indian diaspora has established its presence through multiple waves of migration, ranging from ancient spice trade routes and colonial labor systems to contemporary professional and entrepreneurial movements (Mishra, 2007; Ramstedt, 2004). Despite being numerically small within Indonesia's vast population, this diaspora has disproportionately impacted the nation's cultural, economic, and religious landscape.

In regions such as North Sumatra, Jakarta, Bali, and Surabaya, members of the Indian diaspora have contributed to trade, education, media, and health services. Historical figures such as Pandit Narendra Dev Pandit Shastri, who played a pivotal role in the official recognition of Hinduism in Indonesia, and contemporary personalities like Dr. Ravinjay Kuckreja and Sonia Kaur illustrate how this community has been active in shaping both religious and socio-economic life. However, their contributions are not without challenges. Issues such as cultural misrepresentation, limited participation in political and institutional frameworks, and persistent societal stereotypes reveal ongoing struggles in asserting ethnic identity while navigating national belonging.

While studies on diaspora communities often highlight their role in transnational engagement and soft power, limited attention has been paid to how ethnic identity operates as both a facilitator and obstacle in the context of cultural diplomacy (Bharucha, Rajeswaran, & Stierstorfer, 2021). In Indonesia, a Muslim-majority, multiethnic nation with a complex postcolonial history, ethnic minorities like the Indian diaspora face unique dilemmas in negotiating cultural preservation, social integration, and diplomatic representation. The growing global relevance of cultural diplomacy as a tool for soft power makes it critical to examine how diasporic communities like the Indian diaspora in Indonesia navigate these processes.

This study draws upon two primary theoretical perspectives: cultural diplomacy theory and diaspora/identity theory. The concept of soft power, as introduced by Nye (2004), is central to understanding how states and non-state actors leverage cultural influence to achieve diplomatic objectives. In this context, cultural diplomacy refers to the use of cultural engagement to foster positive international relations, promote mutual understanding, and enhance national prestige. For this study, it is essential to explore how the Indian diaspora in Indonesia contributes to soft power through cultural exchanges, media representation, and intercultural dialogue.

In parallel, the study incorporates diaspora and identity theory, drawing on the works of Stuart Hall and Benedict Anderson. Hall's notion of cultural identity as fluid and multiple provides a valuable framework for understanding how the Indian diaspora navigates its ethnic identity within Indonesia's multicultural national framework. Anderson's concept of imagined communities further contextualizes how diasporic groups perceive their connection to their homeland and host society (Mukherji, 2020). Together, these theoretical lenses help to examine how ethnic identity within the Indian diaspora functions not only as a personal and communal marker but also as a tool for cultural diplomacy. By analyzing the intersection of diaspora identity and cultural diplomacy, this study offers important insights into the role of the Indian diaspora in shaping Indonesia's diplomatic landscape (McSweeney & Nakamura, 2019). These theoretical lenses are applied to explore how ethnic identity within the Indian diaspora functions as a personal and communal marker and a tool for cultural diplomacy. By examining the intersection of diaspora identity and cultural diplomacy, this study provides insights into the role of the Indian diaspora in Indonesia's diplomatic landscape

This research is significant for two primary reasons. First, it addresses a gap in diaspora studies by focusing on Indonesia, a geopolitically strategic partner for India in Southeast Asia, a region that has yet to be fully explored in the context of diaspora studies. Second, it investigates the intersection of identity, media representation, and cultural participation, examining how these factors shape both public perceptions and diplomatic influence. Understanding these dynamics is crucial for academic inquiry and informing policies that promote inclusive multiculturalism and strengthen bilateral relations between India and Indonesia. This study specifically aims to explore how ethnic identity influences the role of the Indian diaspora in cultural diplomacy between the two nations. In doing so, it seeks to analyze how the Indian diaspora in Indonesia negotiates its ethnic identity within the multicultural national framework, examine the role of media and cultural practices in shaping public perceptions of the diaspora, and investigate how the diaspora contributes to India-Indonesia cultural diplomacy while identifying the structural and societal challenges they face. To achieve these objectives, the study will address three main interrelated questions: first, how does the ethnic identity of the Indian diaspora function ambivalently as both a bridge and an obstacle in their engagement with cultural diplomacy, particularly in strengthening the relationship between India and Indonesia? Second, how do media narratives and cultural representations shape public perceptions, influence social integration processes, and mediate the visibility of the Indian diaspora in Indonesia's multicultural public sphere? Finally, what strategies can be proposed to enhance the

role of the Indian diaspora as agents of soft power and constructive cultural exchange? These questions will guide the research in understanding the complexities of ethnic identity, cultural diplomacy, and diaspora agency in the context of Indonesia's multicultural society.

Based on the formulated research objectives, this study seeks to answer three main interrelated questions in analyzing the role and challenges of Indian diaspora ethnic identity in Indonesia's cultural diplomacy context. First, this study questions how the ethnic identity of the Indian diaspora functions ambivalently as both a bridge and an obstacle in their engagement with cultural diplomacy, particularly in bridging the relationship between the country of origin (India) and the country of residence (Indonesia). Secondly, this study explores how media narratives and cultural representations shape public perceptions, influence social integration processes, and mediate the visibility of the Indian diaspora in Indonesia's multicultural public sphere. Third, this study also aims to identify and propose strategies that can strengthen the role of the Indian diaspora as agents of soft power and constructive cultural exchange. These three questions are designed to unpack the dynamics of identity, agency, and diplomacy within an interdisciplinary framework that combines the perspectives of diaspora studies, media studies, and international relations while emphasizing the contribution of this research to the development of a more inclusive and community-based approach to cultural diplomacy. By focusing on these questions, the study contributes to a deeper understanding of how diaspora identity can be strategically mobilized to promote inclusive, reciprocal, and context-sensitive cultural diplomacy in Indonesia.

Methodology

This research uses a qualitative approach with a case study design to explore the role and challenges of ethnic identity of the Indian diaspora in Indonesia in the context of cultural diplomacy. This approach was chosen because it can capture the complexity of subjective experiences, identity construction, and sociocultural dynamics. Data collection is conducted through semi-structured, in-depth interviews, media content analysis, and participatory observation. The interviews involved 85 informants from Indian diaspora communities, including Tamil, Gujarati, Punjabi, and Sindhi, living in cities such as Jakarta, Medan, Bali, and Surabaya. The informants included businessmen, educators, religious leaders, artists, and community leaders actively involved in cultural diplomacy activities. A purposive sampling technique is used to capture relevant informants, with snowball sampling as a complement to reach

hard-to-access individuals, particularly digital content creators and young cultural activists.

In addition to interviews, this research will also analyze digital media content such as TikTok videos, podcasts, blogs, and social media posts produced by diaspora members. This analysis aims to understand how ethnic identity and cultural diplomacy practices are represented and negotiated in digital spaces. Participatory observations will also be conducted in various cultural activities, such as religious festivals, culinary exhibitions, and art performances, to capture the direct interactions between diasporas and local communities and the cultural symbolism that appears in public spaces.

All qualitative data, including interview transcripts, field notes, and media artifacts, will be analyzed using thematic analysis methods. This process will include open coding and stepwise categorization to identify key patterns and themes related to identity negotiation, media representation, and cultural diplomacy strategies. The analysis will be conducted with the support of NVivo software to ensure systematization and interpretative rigor. The analytical framework is informed by theories in diaspora studies, cultural diplomacy, and identity theory in a postcolonial context.

This research also takes ethical considerations seriously. All participants were provided with written information about the purpose and scope of the study and their right to voluntary participation. Confidentiality of identity and cultural sensitivity will be strictly maintained, especially in religious and traditional contexts. By combining interviews, observation, and media analysis in the context of diverse diaspora communities, this research is expected to make conceptual and practical contributions to understanding diasporas' role in strengthening relations between nations through inclusive cultural diplomacy.

Results and Discussion

The Indian diaspora in Indonesia is a multifaceted community with a long history of migration, cultural exchange, and contribution to the country's social, economic, and cultural life. This section discusses the role and challenges of ethnic identity in the context of cultural diplomacy, focusing on the Indian diaspora in Indonesia, with emphasis on how it has influenced and interacted with Indonesian society across various dimensions. Each subsection presents a comprehensive view of the diaspora's contributions, challenges, and ongoing role in shaping Indonesian cultural diplomacy.

Historical Context of Indian Migration to Indonesia

The migration of Indians to Indonesia spans several centuries, beginning with the ancient spice trade. The first significant Indian presence in Indonesia emerged as early as the 9th century, with maritime trade routes facilitating the movement of Indian merchants and artisans to Southeast Asian islands. These early migrations were both economic and cultural, with Indian religions, particularly Hinduism and Buddhism, making lasting impressions on the region (Chandra, 1999). The influence of Indian civilization on Indonesia is still evident today in the religious practices, architectural structures, and even the linguistic characteristics of various regions.

A second wave of migration occurred during the colonial era, particularly in the 19th century, with the arrival of Indian laborers and traders who were brought to the archipelago by the Dutch colonial administration. The Tamil community, in particular, settled in parts of Sumatra and Java, working primarily in the plantation economy (Singh, 2012). These laborers became integral to the economic activities of the colonial state and played a crucial role in the growth of the plantation industry. This wave in the nineteenth century was dominated by Tamils (Mani & Varadarajan, 2005). Another small-scale migration took place in the early twentieth century by Punjabi Sikhs who were interested in opening shops in Java, especially in Batavia. Migration in the nineteenth and early twentieth centuries occurred before India and Indonesia's independence. Over time, this group began to establish its own social networks and economic structures, contributing to the creation of a distinct Indian community within Indonesia.

The third wave of migration occurred after the partition of India in 1947, with large numbers of refugees fleeing the newly formed nations of India and Pakistan. Many of these refugees sought asylum in Indonesia, and their arrival added to the already established communities of Indians. This migration period helped reinforce the diverse nature of the Indian diaspora in Indonesia, with different subgroups such as Punjabis, Gujaratis, and Bengalis forming distinct but interconnected networks in Indonesian cities (Pande, 2014).

As such, these early diasporas had no attachment to either the Indian Republic or the newly independent Indonesia; they were not indigenous but considered foreign. India also maintained a 'hands-off' approach towards them, even in cases where people of Indian descent were denied fundamental rights, such as in Myanmar and Malaysia (Pande, 2014). The opposite happened between India and indigenous Indonesians. Indonesian nationalists established Theosophical Societies originating from Madras in Java, Medan, Gorontalo, and Denpasar. Javanese organizations such as Boedi Oetomo (founded 1908), Mimpitoe (founded 1909), Java Instituut (founded

1919), and Taman Siswa (founded 1922) interacted closely with Indonesian and Indian Theosophists (Ramstedt, 2008). This also included visits in 1927 by Nobel laureate Rabindranath Tagore, philologist Suniti Kumar Chatterji, artist-archaeologist Surendhranath Kar, and painter-musician Dhirendra Krishna Deva Varman as a form of renewed interest in the Hindu-Buddhist heritage of Java (Das, 2002). The Greater Indian Society (founded in 1926) also celebrated Indonesia's historical relationship with India, focusing on research activities. The third and final wave occurred during the partition of Pakistan and India, which was part of their declaration of independence in 1947. Some 14 to 18 million people had to move across the border to secular India, Islamic Pakistan, or elsewhere, including (but not limited to) Southeast Asia (Dyson, 2019). This mass migration resulted in the highest casualty rate for migration, according to the 2014 Guinness Book of World Records. One million people were killed, and another 12 million were displaced. Most of them were from the Punjabi and Sindhi ethnic groups. The 1930 Dutch census recorded 21,000 Indians in North Sumatra. Smaller groups comprised 5,500 Indians in Java, 2,900 in Kalimantan, and about 1,500 in other islands. Most of them were single men born in the Dutch East Indies (Mani, 2006). However, the Japanese occupation and World War II saw this number decline as the Indian business community was displaced, while some were recruited as soldiers.

The historical context of Indian migration to Indonesia demonstrates how these communities have evolved over time from isolated groups of traders and laborers to a complex and integrated part of Indonesian society, influencing everything from economics to religion.

Cultural and Religious Influence

The cultural and religious contributions of the Indian diaspora in Indonesia are among the most enduring aspects of their presence. The Indian diaspora has brought with it a rich tapestry of traditions, religious practices, and cultural customs that have significantly influenced Indonesian culture. Hinduism, Buddhism, and later Sikhism and Islam, practiced by various Indian communities, have shaped the religious landscape of Indonesia, particularly in Bali, North Sumatra, and Java.

Hinduism, as brought by Indian traders and priests, has had a profound influence on Indonesian culture, particularly in Bali, where it remains the dominant religion. The practice of Hindu rituals, the establishment of temples, and the celebration of festivals such as Diwali and Nyepi reflect the deep-rooted cultural ties between India and Indonesia (Vijayakumar, 2010). Similarly, Indian music, dance forms like Bharatanatyam, and literature have found their way into Indonesian

cultural expressions, especially in Java, where many traditional performances were inspired by Indian epics such as the Ramayana and Mahabharata (Sari, 2016).

Religiously, the Tamil community has introduced various forms of Hindu worship, focusing on deities like Murugan and Mariamman, with temples like the Mariamman Temple in Medan playing a central role in the community's religious life. The Sikh community, while maintaining its distinct religious practices, has also integrated elements of Indonesian culture, especially in urban centers like Jakarta, where gurdwaras (Sikh temples) serve as centers for both religious worship and community engagement (Ramstedt, 2008).

Post-Independence in Indonesia, the Balinese folk religion was transformed into Hinduism, which was officially recognized by the state. This process began in the 1950s with attempts to formalize Hinduism as independent of Balinese culture (Picard, 2017). This process was required to ensure Hinduism was a universal religion, not exclusive to any ethnic group (Aryadharma, 2009). Being a universal religion is one of the many requirements to become an official religion in Indonesia, which has a position and receives a budget under the Ministry of Religious Affairs. This reformulation of Hinduism transformed Dharma-based Religion into a religion like Islam, and thus has created a new Hindu movement, Agama Hindu Dharma Indonesia. This transformation is also linked to the reformation of Hinduism in India. Hindu nationalists such as Rammohun Roy, Dayānanda Saraswati, Swāmi Vivekānanda, and Mohandas K. Gandhi shaped anti-colonial movements as well as universalized Hinduism in a development now known as Neo-Hinduism. These movements in India formed a monotheistic, devotional-based, and liberal version of Hinduism that was "universalistic and all-embracing." One such movement was the Ārya Samaj, founded by Dayānanda Sarasvati (1824-83) in Mumbai in 1875. A missionary of the Ārya Samaj, Narendra Dev Pandit Shastri, contributed to the formation of Indonesian Hinduism through his writings, his active role in Hindu leadership in Indonesia (Ramstedt, 2008), and even in the formation of the Tri Sandhyā prayer (Lanus, 2014). Pandit Shastri became an essential figure in the efforts to recognize Hinduism as an official religion in Indonesia, which solidified the role of the Indian diaspora in the field of Hinduism.

Indian cultural influence is also evident in food, clothing, and language. Indian cuisine, particularly dishes like biryani and curry, has been absorbed into Indonesian culinary traditions, especially in regions with significant Indian populations. Furthermore, many members of the Indian diaspora still speak Tamil, Hindi, and Punjabi, contributing to Indonesia's linguistic diversity.

However, despite these cultural contributions, the Indian diaspora has faced challenges in maintaining its religious and cultural identity in the face of Indonesia's strong national identity, which is centered around Pancasila and the nation's predominantly Muslim population (Vijayakumar, 2010). This has led to tensions in some regions, especially in times of political or social unrest.

Economic Contributions and Integration

Economically, the Indian diaspora has been instrumental in shaping Indonesia's business landscape. From early trade activities during the colonial era, Indian-descended entrepreneurs and laborers have moved from the periphery to the center of Indonesia's economic life. The diaspora has played a crucial role in sectors such as agriculture, trade, textiles, and manufacturing.

The Indian community's involvement in the trade of spices, textiles, and precious metals helped lay the foundation for modern economic activity in Indonesia. In the post-independence period, members of the diaspora transitioned from small-scale traders to major business leaders. Families like the Tolarams and the Lohia family played pivotal roles in the development of industries such as textiles, chemicals, and consumer goods (Mani, 2006). Furthermore, Indian businesses in Indonesia have made significant contributions to job creation and economic development, particularly in regions like Jakarta and Surabaya.

In recent decades, the Indian diaspora has also become involved in modern industries, including information technology, education, and financial services. The Indian community has established a strong presence in the tech industry, with figures like Bhavin Turakhia, the founder of Flock, and the other members of his family contributing to Indonesia's growing tech sector (Surpi, 2022).

Indian Diaspora businesspeople have played an important role in Indonesia's economic development. They contribute significantly to the field of trade and other sectors such as manufacturing, banking, and technology. Many businessmen of Indian descent started their businesses in the trade sector. They were involved in trade in textiles, spices, gold, and other consumer goods. A successful example is the Tolaram Group, which distributes and produces food and beverages in Indonesia. Several businessmen of Indian descent have established factories and manufacturing companies that produce products such as textiles, plastics, and chemicals. For example, the Texmaco Group is well-known in the textiles and machinery industry. They also play an important role in the banking and financial sector. Many are involved in establishing banks, investment companies, and insurance companies. Some well-known figures in this sector are Shanti Shamdasani, who has a network of

companies in various sectors, including finance. Many of the new generation of businesspeople of Indian descent are engaged in the technology and startup sectors. They founded companies operating in the fields of information technology, fintech, and e-commerce. One example is Bhavin Turakhia, founder of Flock, a communications technology company based in Indonesia. Many businesspeople of Indian descent are involved in philanthropy and community development activities. They established foundations and social institutions focusing on education, health, and community economic empowerment. For example, the Bina Sejahtera Foundation was founded by the extended Lohia family, also known as the owners of the Indorama Group, one of the largest manufacturing companies in Indonesia. Indonesian cinema also experienced rapid development due to the role of the Indian diaspora, Raam Jethmal Punjabi (born 6 October 1944). Raam Punjabi is a film and soap opera producer with Indian and Indonesian ancestry. He is the most successful producer with the production house Multivision Plus. Also, Manoj Punjabi is currently a very popular Indonesian film producer of Indian descent. Manoj and his father are the founders of the largest production house in Indonesia, MD Entertainment, and are also the figures behind the success of the film "KKN di Desa Penari." Due to the creativity of the Indian Diaspora in the field of cinema, Indonesia has been able to show rapid progress in the world of entertainment

Indian diaspora businesspeople in Indonesia have proven to be integral to the country's economic and social development. Through various sectors, they create jobs, increase economic prosperity, and maintain and enrich Indonesia's cultural diversity.

Despite these successes, integrating the Indian diaspora into Indonesia's broader economic life has not been without challenges. Many members of the diaspora have faced barriers related to nationality, ethnicity, and religion, which have sometimes hindered their ability to fully integrate into the wider economic fabric of the country. Additionally, political tensions, such as the anti-Chinese riots of 1998, have at times created a climate of insecurity for both Indian and Chinese communities, resulting in a retreat to more insular economic networks (Dyson, 2019).

Cultural Diplomacy and Educational Initiatives

The role of the Indian diaspora in cultural diplomacy between India and Indonesia is a significant aspect of their contribution to both countries. Cultural diplomacy refers to the use of cultural exchanges and interactions as tools for fostering mutual understanding and strengthening bilateral relations. The Indian diaspora has played an important role in promoting Indian culture in Indonesia through various educational and cultural initiatives.

Indian language schools, such as those offering Hindi and Tamil courses, have been central to preserving and disseminating Indian cultural practices in Indonesia. These schools not only serve the Indian community but also attract a broader Indonesian audience interested in learning about Indian languages and culture (Mohanty, 2010). Additionally, cultural festivals like Diwali and Holi, which have gained popularity among Indonesians, serve as major platforms for cultural diplomacy, with performances, dance, and culinary events showcasing Indian traditions.

The Indian diaspora has also contributed to educational exchanges between India and Indonesia, with students and professionals traveling between the two countries for academic and professional development. Institutions such as the Indian Cultural Centre in Jakarta serve as hubs for promoting educational and cultural exchanges, strengthening the ties between the two nations (Untara et al., 2024).

Moreover, through their involvement in media and the arts, members of the Indian diaspora have shaped the entertainment industry in Indonesia. Figures such as Raam Jethmal Punjabi and Manoj Punjabi have made significant contributions to Indonesian cinema, particularly in the production of popular TV shows and films, which often feature Indian themes or storylines, thereby contributing to the cultural dialogue between the two nations (Wedakarna et al., 2016).

Social Integration and Cultural Exchanges

The integration of the Indian diaspora into Indonesian society has been complex, shaped by both the contributions of diaspora communities and the challenges they face in terms of identity and cultural preservation. While the Indian diaspora has largely been accepted in urban areas and in sectors where their economic contributions are most visible, in more rural or less developed areas, they have sometimes been marginalized and viewed as outsiders (Ramstedt, 2008).

The challenges of integration were particularly evident during the 1998 anti-Chinese and anti-Indian riots, which saw the eruption of racial and religious tensions in Indonesia. These events, while not targeted specifically at the Indian community, highlighted the vulnerabilities faced by ethnic minorities in a nation where ethnic and religious identities often intersect with political and economic power (Pande, 2014).

In 1998, ethnic Chinese became the target of mobs in Jakarta and in various major cities in Indonesia. This did not only happen to the Chinese but to other ethnicities, such as Indian descent. Therefore, many students and families of Indian descent chose to leave Indonesia. One of them is Ravinjay, a young man who found his calling as a teacher. For those who were students, many returned to Indonesia

when education ended and things returned to normal, although not a few chose not to return. One of the triggers of the 1998 tragedy in Indonesia was the lingering trauma of the Indonesian people with the colonizers. Ethnic Chinese and Indians are still classified as 'foreigners' who are synonymous with colonizers.

In addition, these two ethnicities are very inclusive, limiting their association with local people, and many of them are successful businessmen. Economic disparity led to riots and looting of Chinese-owned shops, as well as violence against 'foreigners.' The Indian diaspora, too, are still stigmatized as foreigners even though they have been in Indonesia for generations. Likewise, this stigma builds its own identity pattern for the Indian diaspora. Meanwhile, Arab descendants are very accepted by the Indonesian population because of the initial strategy carried out. Namely, the scholars and people of Arab descent came to Indonesia without bringing wives, even if they married more than one wife. This marriage bond makes Arab descendants more accepted. In addition, religious ideology, namely the Qibla to Mecca and respect for the scholars and the blood of the Prophet, creates a strong bond for the Indonesian population, which is predominantly Muslim.

In general, there is a prayer pattern of identification of the Indian diaspora; first, those who still identify themselves as descendant Indians, who still have strong ties to Indian society, still practice several ancestral traditions. Second, those who identify as Indonesians have little contact with Indian society and no longer practice the inherited traditions. Dr. Ravinjay represents the Indian diaspora, which identifies as Indonesians, is not active in Indian diaspora activities, is not associated with business, and does not actively follow Indian ancestral traditions. Dr. Ravinjay chooses to study Hinduism academically and delves into the roots of Hindu traditions in Indonesia through various ancient texts of the archipelago. In general, the role of culture and diplomacy is essential for the Indian diaspora. In various cities in Indonesia, several cultural and religious activities are celebrated by the Indian diaspora community and invite residents to participate, such as Holi celebrations, Diwali, and Indian art and cultural performances, even collaborating with Indonesian cultures, such as Indian dance collaborating with Balinese dance, thus creating admiration and a sense of bridging between the two cultures, namely India and Bali. The Indian Diaspora also actively organizes various activities other than art. Activities in Vedic-based knowledge and technology as an exchange of knowledge. Seminars, workshops, and research activities are often held, strengthening people-to-people relations (Surpi, 2022).

According to the Indian Diaspora, Indonesia is not the foremost destination for migration from the Land of India for several reasons, including religion. Since before

its independence, the Dutch East Indies have been known as a region that has successfully implemented Islamization. With a different religion, it will undoubtedly limit the movement of the Indian diaspora and is also vulnerable to religious and cultural friction. The strong religious presence in Indonesia has also led to many Indian diasporas embracing Islam and, more recently, the phenomenon of Indian diasporas converting to Christianity. However, in general, those who embrace Hinduism build communities and temples of worship that are exclusive in nature; even Indonesians who are Hindus very rarely visit Indian Hindu Temples because of the form of buildings, worship procedures, and calculation of holy days to different traditions. Thus, to this day, the Indian diaspora is still very exclusive, not even joining the Hindu Indonesian community.

However, in areas not identified with temples and shrines, Indian diasporic communities and local communities can merge closely and beautifully, for example, at the Satya Sai Baba Spiritual Teacher gathering place or other activities such as yoga and meditation (Surpi et al.,2020). However, there has not been an approach concerning places of worship such as temples and shrines; Indian diasporic Hindus focus on temples complete with Indian worship procedures, and Balinese ethnic Hindus focus on temple worship. In general, local ethnic Hindus are not accustomed to praying in Indian temples, and vice versa. Indian diaspora Hindus are not accustomed to praying in Balinese-style temples or Javanese Candi.

Despite these challenges, the Indian diaspora has made significant strides in fostering cultural exchanges with the wider Indonesian community. Social integration has been promoted through communal activities such as yoga, meditation, and joint participation in cultural festivals. These activities have helped build bridges between Indian and Indonesian populations, promoting mutual understanding and respect across cultural boundaries.

Diaspora Networks and Cultural Diplomacy

The formation of diaspora networks has been a crucial factor in the success of Indian cultural diplomacy in Indonesia. These networks not only provide support and resources for the Indian community but also facilitate cultural exchanges and economic partnerships between India and Indonesia. Diaspora networks have played an essential role in organizing events, promoting bilateral business ventures, and advancing the interests of both countries in international forums.

One of the most prominent examples of diaspora networks is the Indian Business Association of Indonesia (IBAI), which helps Indian businesses in Indonesia connect with each other and with local Indonesian companies. These networks foster

a sense of solidarity and shared identity among members of the Indian diaspora while also serving as a bridge for wider economic and cultural collaboration between the two countries (Somvir, 2005). The role of the Indian diaspora in cultural diplomacy is not always formal and centralized. In many cases, diaspora communities carry out what is referred to as diaspora diplomacy or grassroots cultural diplomacy (Ho & McConnell, 2017). In Indonesia, festivals such as Diwali, Holi, and Navaratri organized by the Indian community have become important moments in introducing Indian culture to Indonesians. These events strengthen the diaspora community's relationship with the local community and reinforce positive perceptions of India as a country of origin.

With these, the Indian diaspora in Indonesia has made significant contributions to the country's social, economic, and cultural life. Despite challenges related to integration and identity, the diaspora has played a crucial role in promoting cultural diplomacy, fostering economic development, and preserving cultural heritage. By maintaining strong cultural ties to India while actively participating in Indonesian society, the Indian diaspora is an important link between the two nations, facilitating greater understanding and cooperation.

Although this study has historically and analytically described the role of the Indian diaspora in Indonesia in relation to ethnic identity and cultural diplomacy, several limitations should be noted. First, the approach in this study is still descriptive and based on secondary literature, so it has not been able to capture in depth the subjective experiences and cultural dynamics from within the diaspora community itself. Secondly, the focus of this study is still limited to certain communities, such as Tamils and Sindhis in big cities such as Medan and Jakarta, Bali, and Surabaya, while the diversity of Indian diaspora communities in other regions has not been much touched upon. In addition, the practices of non-formal cultural diplomacy carried out through daily activities, interpersonal relationships, and community activities are also less systematically mapped in this study, even though they are often the main force in building cultural bridges across nations.

Based on these limitations, future research can be directed toward more contextualized ethnographic studies in various parts of Indonesia to directly reveal the cultural practices that live in diaspora communities. Research can also adopt an intersectionality approach to understand how ethnic identity in the diaspora interacts with other factors such as social class, gender, and generation, especially in the context of young diasporic generations who experience the process of negotiating identity between two cultural worlds. Finally, a comparative study between the Indian diaspora in Indonesia and other Southeast Asian countries, such as Malaysia,

Singapore, or Thailand, can enrich our understanding of patterns of cultural diplomacy that emerge from different Asian cultural roots and historical relations. As such, this study is expected to be a starting point for a broader, more critical, and in-depth exploration of the role of diasporas as important actors in transnational cultural diplomacy.

Conclusions

The Indian Diaspora in Indonesia plays a multifaceted role in bridging cultures and promoting diplomacy between India and Indonesia. Through cultural dissemination, education, arts, culinary, economic collaboration, social activities, media, community networks, and participation in public policy, they contribute significantly to strengthening cultural relations and diplomacy between the two countries. The challenges faced in maintaining ethnic identity and local acceptance can be addressed through inclusive and sustainable strategies, enhancing cross-cultural understanding and international cooperation. The Indian diaspora in Indonesia is a crucial component of the cultural relationship between the two countries. Their ethnic identity plays a key role in cultural diplomacy but is not free from challenges. By understanding these roles and challenges, we can develop more effective strategies to promote cross-cultural understanding and international cooperation. This research seeks to provide deep insight into these dynamics and contribute to the development of a more inclusive and effective cultural diplomacy.

Despite facing various challenges, ranging from stereotypes and limited socio-political representation to issues of cultural acceptance, the Indian diaspora in Indonesia has demonstrated remarkable resilience and adaptability. These challenges necessitate more inclusive, participatory, and sustainable approaches to cultural diplomacy. Strengthening their role requires cross-sectoral strategies that include multicultural education, media representation, cultural exchange initiatives, and institutional cooperation between India and Indonesia.

This study underscores the need for a deeper understanding of the roles and obstacles faced by the Indian diaspora in order to formulate more effective policies that enhance cross-cultural understanding and promote harmonious international collaboration. The diaspora should not merely be seen as a minority community but rather as a crucial element in the cultural diplomacy architecture between the two nations. Ultimately, the presence and contributions of the Indian diaspora enrich Indonesia's multicultural landscape while simultaneously reinforcing the foundations of diplomacy grounded in inclusivity, tolerance, and intercultural dialogue. Their role exemplifies how ethnic identity, when supported by strategic and inclusive frameworks, can serve as a powerful instrument for fostering long-term bilateral cooperation and cultural synergy.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Innovative Approaches to the Management of Cultural Institutions in the Digital Age

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Abstract

Digitalization has transformed the management of cultural institutions significantly. Digital tools have extended their potential, enhancing visitors' entertainment accessibility. This means that digital technologies are to contribute to cultural institutions' operational activities and management processes. Therefore, the research aim is to systematize and analyze modern innovative approaches to managing cultural institutions in the digital age, determine their efficiency, and outline the challenges for their implementation. The research was a systematic literature review based on the PRISMA statement. It suggested selecting 215 peer-reviewed articles through the Scopus, Web of Science, and DOAJ databases. To analyze the data, content analysis, thematic coding, and comparative analysis were applied. The findings showed that innovative models used in managing cultural institutions are based on digital technologies. The profound impact of digital technologies on the management of cultural institutions was described. This refers to the increased audience engagement and the facilitation of management processes. Besides, specific challenges of using digital technologies in managing cultural institutions were outlined. They include lack of funding, low digital literacy, resistance to change, and ethical issues. The research will be valuable for the enhancement of scientific discourse as well as the development of practical measures to manage cultural institutions effectively through digital technologies.

Keywords: *Adaptive Strategies, Creative Industries, Cultural Sustainability, Digital Governance, Institutional Innovation*

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Introduction

Digitalization is a powerful engine that brings innovation across industries. Since innovation is essential for organizational survival, it enhances the efficiency of businesses, education systems, and public services (Vărzaru & Bocean, 2024). Digitalization stimulates economic growth globally since digital tools significantly contribute to intelligent automation of processes and optimization of data management (Niedzielski et al., 2024). Moreover, digitalization supports the procedures of real-time decision-making for governments, healthcare systems, financial services, transportation networks, and research organizations, providing the basis for strategic planning (Zhelev & Kostova, 2024).

The COVID-19 pandemic and the ongoing full-scale war in Ukraine have reshaped the global business landscape and forced private companies and state institutions to adapt rapidly to new conditions. This has led to the transformation of management practices across various sectors. "New normal" required the rapid adoption of digital tools and platforms to improve communication, implement new solutions, and achieve high innovation performance during challenging periods (Holl et al., 2024). Expectedly, organizations were forced to introduce cloud computing, virtual collaboration, e-commerce, data analytics, and artificial intelligence-driven solutions to perform everyday activities (Vărzaru & Bocean, 2024). Moreover, the war has encouraged companies and institutions to innovate quickly using digital technologies for resource allocation, sustainable supply chains, personnel management, communication, and identifying security risks (Khatser & Polusmiak, 2024).

Digitalization has transformed the management of cultural institutions as well. Danilyan, Dzeban, and Kalynovskyi (2022b) stated that these institutions must adapt to unpredictable socio-political dynamics to remain sustainable and relevant in the digital era. According to recent findings, digital tools extended their marketing and communication practices, enhanced visitors' entertainment, and improved audience interaction (Wang & Meng, 2023). Online exhibitions and virtual tours allowed cultural institutions to increase accessibility, breaking physical time and space limitations and creating inclusive opportunities (Li et al., 2022). Particular works describe the organization of digital archives using digital tools. For example, Huda (2022) stated that digital tools contribute to establishing a dynamic records management system and help overcome emerging challenges, remarkably increasing the volume of data and ensuring data security and privacy.

The emergence of interactive systems enabled the creation, maintenance, and alteration of exhibitions online and on-site (Cesário et al., 2023). Virtual reality (VR)

and augmented reality (AR) applications are used for the exploration of historical sites and artworks, offering alternative ways for cultural institutions like museums or galleries to interact with their visitors (Prokopenko & Sapinski, 2024; Shehade & Stylianou-Lambert, 2020). At the same time, gamification and personalized content based on artificial intelligence (AI) enhance interaction and make cultural management more sophisticated through advanced visitor profiling (Ivanov, 2024). In this context, special attention was focused on implementing deep learning and data analytics in managing cultural institutions (Ferrato et al., 2022). It was found that these tools identify the strengths and weaknesses of the cultural institutions and help understand visitor preferences, optimize marketing strategies, and adjust future exhibitions to audience interests. Some sources stress that using AI-based technologies within cultural management impacts person-to-person interactions, shared values, beliefs, and behaviors of participants in a cultural environment (Murire, 2024). Importantly, concerning the study of Danilyan, Dzeban, Kalynovskyi, and Saltanov (2023), it was admitted that the stability of cultural institutions in the digital era depends not only on technological innovation but also on the value-based foundations of social resilience.

The analysis of innovative approaches to managing cultural institutions is an essential aspect of culturology, especially given the profound impact of technologies on the creation, consumption, and representation of cultural content today (Chatterjee, 2024). The rise of digital tools has changed cultural management in the technical, organizational, information, communication, and logistical aspects (Bannikova et al., 2023). As technology advances, cultural managers must implement innovative techniques for curating, showcasing, educating, and disseminating cultural knowledge and heritage to remain relevant in the community that is transforming into digitally minded ways.

Moreover, the changing models of culture consumption – driven by digitalization – have transformed the delivery and engagement with art, culture, and entertainment (Murire, 2024). The modern audience rejects passive consumption and prefers interactive, immersive, and personalized experiences that can be provided only by implementing innovations and digital acculturation among individuals or communities (Dey et al., 2020). Additionally, cultural institutions face several serious challenges today, such as declining visitors, expert involvement, organizational and technical issues, and systemic financial deficits that directly influence their activities and interaction with the audience (Choi & Kim, 2021; Nikolaou, 2024). Considering this, it is worth stating that examining innovative approaches to managing cultural

institutions may contribute to a better understanding of digital transformations and fostering resilience in the cultural landscape.

At the same time, despite many studies discussing digital transformation in various sectors, the works regarding the management of cultural institutions are still evolving. It was noted that the existing investigations often focus on individual technological tools (VR, deep learning, AI, or robotics) (Cesário et al., 2023; Ferrato et al., 2022; Shehade & Stylianou-Lambert, 2020) or case studies of specific institutions (Choi & Kim, 2021). However, there is not enough research to present comprehensive frameworks that examine the management of cultural institutions in a digital context. The research aims to systematize and analyze modern innovative approaches to managing cultural institutions in the digital age, determine their efficiency, and outline the challenges for their implementation.

The research focuses on identifying innovative models of cultural institution management in the digital age, examining the impact of digital technologies on the interaction between cultural institutions, their audiences, and internal management processes, and exploring the main barriers and challenges that arise during the implementation of digital innovations in the cultural sector.

Management theory and management models

Management theory is often defined as structured knowledge that seeks to understand, explain, and improve organizational management practices (Junker et al., 2022). Originating in disciplines such as economics, psychology, and sociology, management theory addresses the complexities of organizational performance and dynamics. According to Skačkauskienė (2022), this theory focuses on understanding the development of management science, providing ideas on future trends, and identifying key areas and research specializations. In other words, management theory is a statement that discloses an aspect of organizational reality and enables prediction and possibly control of future work-related events (Joullié & Gould, 2023).

Management theory includes several essential components to achieve organizational effectiveness, particularly planning, leading, human resources functions, productivity optimization, decision-making, communication, collaboration, and performance evaluation (Bachynskyi, 2024; Bannikova & Mykhaylyova, 2023). Strategically, management theory refers to innovation and digital transformation (León Gómez & Jiménez López, 2024), fostering intellectual capital and knowledge management (Suparwadi et al., 2024), promotion of sustainability and corporate ethics (Nikolenko et al., 2024). Management theory is interdisciplinary and highly contextual in scientific discourse since its realization depends on industry-specific factors, social

trends, cultural influences, economic conditions, and technological influence (Mabi & Buluma, 2024; Skačkauskienė, 2022).

Various management models are introduced to implement management theory. They differ depending on the organization's objectives, industry sector, internal factors, and external conditions. Some widely recognized models include the classical model, lean management, agile management, and stakeholder-oriented approaches; each of them is designated to maximize efficiency and promote adaptability as well as long-term sustainability (Junker et al., 2022; Piwowar-Sulej et al., 2022). Specific findings describe scalability and contingency models, which are essential in the dynamic ecosystem and may be implemented in a big data environment, considering factors like organizational conditions, technology, and workforce (Mardiani et al., 2023).

Cultural management

The changing political and economic landscape in which the cultural institutions (museums, galleries, theatres, music festivals, and archives) exist has affected their realities and forced them to concentrate their efforts on establishing an effective management system (Wróblewski et al., 2019). Today, cultural management involves the complex interactions between culture, economy, and society; it redirects the practices of these institutions towards sustainability and innovation that can ensure their survival in the market (Mateos-Ronco & Peiró Torralba, 2019).

The core principle of cultural management is to understand the importance of balancing cultural initiatives with organizational and economic goals under the effect of globalization (Danilyan, Arbeláez-Campillo, & Rojas-Bahamón, 2022a). At the same time, cultural management is responsible for transforming cultural institutions into more adaptive and inclusive environments to be more relevant in the current age (Allam & Yulianto, 2019). Under such conditions, there is a need to implement an open cultural management model that is more externally focused and public-oriented (Della Lucia et al., 2024). It means that modern cultural institutions must integrate new management concepts, technologies, and innovative practices to reach and engage a broader and more diverse audience. It was found that open strategy processes contribute to the enhancement of relevance, transparency, and accessibility of cultural institutions significantly, and they maintain the idea of extensive representation of multiple perspectives and backgrounds, including diverse heritage (Adobor, 2021).

Currently, scholars differentiate the cultural (curation and protection of cultural objects, research), social (access to exhibitions and audience engagement), and economic (economic impact on the community) dimensions of the management of

cultural institutions (Bălan, 2023; Pop at al., 2019). Besides, some works discuss strategic and operative approaches to cultural management. The strategic approach includes sustainability, participatory culture, and activism. However, the operative approach refers to using new technologies (Bălan, 2023).

Change management

Some literature sources are devoted to explaining change management in the cultural sector. According to Moon (2020), change management is overcoming internal and environmental changes that threaten the resources on which a system depends. Traditionally, the role of cultural institutions was to preserve and study the cultural heritage and function as tourist destinations (Saienko et al., 2020). At present, museums, libraries, and galleries have transformed into a means of communication for visitors. They contribute to improving their communities' social life and economic growth (Szabó & Fosztó, 2020).

Additionally, digitalization has been revealed as a significant change in the management of cultural institutions and the formation of a new paradigm of the relationship between these institutions and their users (Choi & Kim, 2021). This requires balancing changes, preserving the past (Polyezhayev et al., 2024), and forming historical thinking among the targeted audience (Pandan, 2024). Efficient change management ensures modernization efforts, achieves results-based operations, and fulfills public expectations (Nikolaou, 2024). Successful cultural institutions remain relevant, inclusive, and financially sustainable in the dynamic cultural landscape.

It is necessary to outline the main change models that can be adapted to the requirements of the cultural institutions in the digital age. Firstly, the literature discusses implementing business models for museums and galleries based on digital opportunities (Güner & Erim Gülaçt, 2022). This model can also be called hybrid because it blends physical and digital access. Regarding this model, traditional activities of cultural institutions change into virtual tours, digital exhibitions, conferences organized through online platforms, etc. Secondly, the social marketing model has been presented. Gonsales (2021) states that the social marketing model strengthens the relevance of cultural activities and makes cultural institutions accessible and sustainable organizations that govern culture and cultural heritage.

Innovation theory

Considering the peculiarities of the management of cultural institutions under the impact of digitalization, innovation theory must be described in detail. Innovation is a cross-disciplinary category that includes product or service, process, marketing,

and organizational innovation (Lin et al., 2024). Additionally, innovation is found to be a distinguishing feature of an efficient management system (Szmitka, 2019). Innovation theory contributes to the performance of an institution, the creation of knowledge within its structure, the promotion of research and development initiatives, and technological advancement (Suparwadi et al., 2024).

The analysis of scientific literature demonstrated that innovation theory is shaped by diffusion of innovation and open innovation, which rely on the gradual acceptance of innovative practices (Bigliardi et al., 2021). Diffusion of innovation helps understand the influence of innovation on changes within cultural institutions. In contrast, open innovation suggests the engagement of cultural institutions with the external environment to create and implement efficient changes. From a scientific point of view, innovation theory focuses on challenges, mainly digital transformation. Scholars analyze the application of innovative digital technologies (Huda, 2022; Wang & Meng, 2023) and data-driven decision-making in cultural institutions (Ferrato et al., 2022).

Besides, innovation theory is concerned with ethics. Despite the extensive use of digital tools in the management of cultural institutions, it is evident that there is an increasing need for ethical behavior from all the participants of the cultural sector. McCausland (2023) admitted that "the most powerful and useful innovations are those that align with ethics and values." In the context of innovation, ethical management prioritizes ethical principles in using digital technologies and innovative tools (Lin et al., 2024). By doing this, cultural institutions can enhance visitor engagement, personalize visitor experiences, and automate the processes intelligently through AI, deep learning, or machine learning.

Methodology

In this research, a search of peer-reviewed articles on innovative approaches to cultural institutions was carried out. These articles were published between January 2015 and January 2025 and included in the Scopus, Web of Science of DOAJ databases. We searched for articles containing the following keywords in the title or abstract: “cultural management,” “management of cultural institutions/museum/galleries/exhibitions,” “innovative approaches in management,” and “digital technologies/tools/instruments in management.” The research involved in the article is theoretical, empirical, or review articles. Firstly, 1567 articles were identified. Then, the screening was conducted according to specific criteria. We selected the peer-reviewed articles published in English. Editorials, book reviews, and

opinion articles (64 articles) were excluded since they do not present original research but reflect the author's perspective on a specific topic.

Further, the abstracts and keywords were analyzed, and the research concerning business corporations or industries' management was excluded. Since the topic of the research deals with cultural institutions, the articles in which the authors reveal the outcomes of cultural management were included. As a result, 467 articles were selected. They analyzed the problems of management of cultural institutions in crises like COVID-19 or war (28 articles), the peculiarities of human resources management and formation of professional competencies among the workforce (17 articles), and the challenges of cultural management (42 articles). Most articles described the impact of technology on cultural management (363 articles). Here, the authors studied using different digital tools like AI, AR, VR, machine learning, and online platforms to manage cultural institutions. Authors paid special attention to digital transformations and the future of cultural institutions. Seventeen articles presented research on the training of future leaders in cultural management. Finally, all articles were analyzed, and 215 works were selected for the review since they met all the criteria — Table 1 overviews research design items.

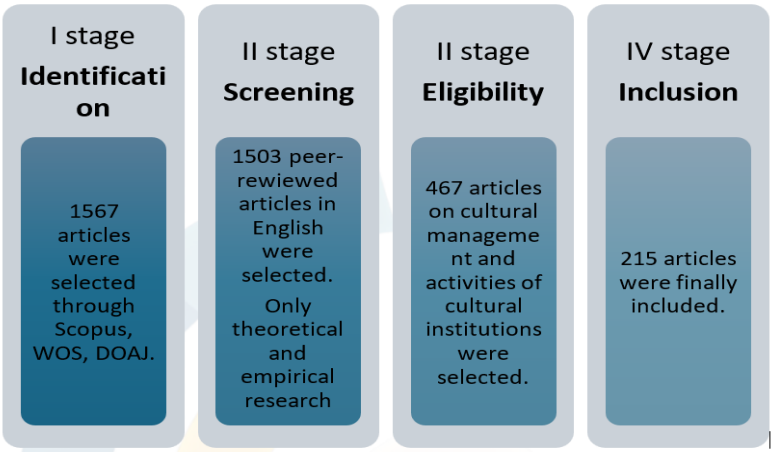
Table 1. Overview of Research Design Items

Item	Content
1. Database	Scopus, Web of Science, DOAJ
2. Publication years	January 2015-January 2025
3. Keywords	"Cultural management," "management of cultural institutions/museum/galleries/exhibitions," "innovative approaches in management," "digital technologies/tools/instruments in management"
4. Document type	Article
5. Peer-review	Yes
6. Language	English
7. Content analysed	Abstract, full text, and cited references
8. Extraction date	13.01.2025
9. Total number of articles	1567
10. Number of included articles	215

A systematic literature review was conducted according to the PRISMA 2020 statement (Sohrabi et al., 2021; Page et al., 2021). The review identified and selected research studies related to the specific research question on the principles of objectivity, transparency, heterogeneity, quality assessment, and clarity. Figure 1 provides a diagram that analyzes the four stages of the systematic literature review

according to the PRISMA statement: identification, screening, eligibility, and inclusion.

Figure 1. Implementation of the PRISMA Statement in Research



The extracted data was analyzed using content analysis, thematic coding, and comparative analysis. These methods allowed us to analyze the data systematically and present the findings from various studies, uncovering main themes and differences in the field. Content analysis enabled the identification of principal patterns and trends related to innovative models and challenges of digital innovations. This method helped to categorize the key elements from scientific literature and quantify the frequency of using keywords. Thematic coding is a qualitative method to identify recurring themes within the literature sources. It also encouraged analysis and synthesis of the discussed topics, theories, or findings. Based on thematic coding, the impact of digital technologies on the interaction between cultural institutions and audiences and management processes was outlined. At the same time, comparative analysis was introduced to compare the findings from different studies. The method involved understanding context and identifying similarities and differences. It contributed to the analysis of innovative models of the management of cultural institutions and the peculiarities of the implementation of digital innovations in the field of culture. Special attention was drawn to the main barriers and challenges in the process. Table 2 shows the research questions and data analysis.

Table 2. Research Questions and Data Analysis

Research question	Aspects to be studied	Method
1. What innovative models of the management of cultural institutions are implemented in the digital age?	Management of cultural institutions Digital innovations Digital transformation Innovative models	Content analysis Comparative analysis
2. What digital technologies impact the interaction between cultural institutions, audiences, and management processes?	Digital technologies Impact on interaction between cultural institutions and audience Impact on the management processes Technological integration in cultural institutions	Thematic coding
3. What main barriers and challenges appear while digital innovations are being implemented in the field of culture?	Barriers to digital innovations Readiness to digital innovations Ethical challenges Impact on traditional operations	Content analysis Comparative analysis

In the following section, the innovative models of the management of cultural institutions, the impact of digital technologies in the management processes, and the main challenges of digital transformation in the cultural sector will be discussed.

Results

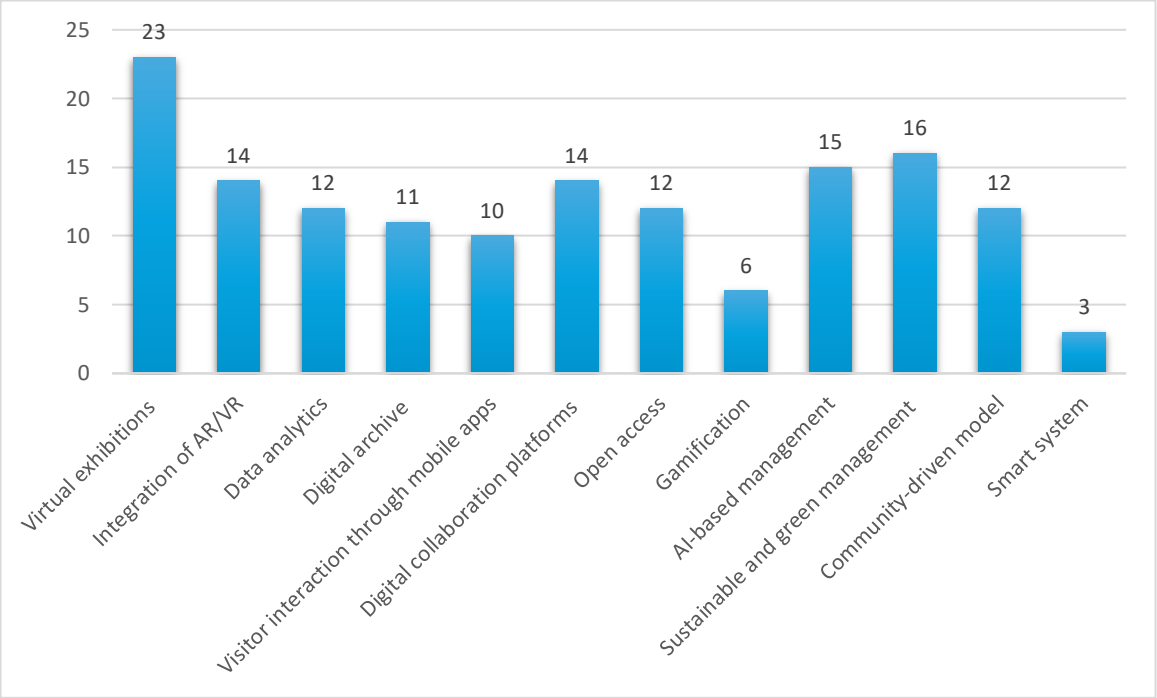
What innovative models of cultural institution management are implemented in the digital age?

The results showed that cultural institutions implement several innovative models to improve the management of everyday operations. These models are based on digital technologies and ensure operational efficiency and increased audience engagement. According to the findings, the virtual exhibition is a widely explained model (23 articles). It was revealed that the cultural institutions can organize virtual tours and demonstrate the collections virtually. For example, virtual exhibitions are efficiently applied by the Louvre Museum in Paris, increasing its accessibility considerably (Corona, 2021). Another frequently discussed model refers to sustainable and green management (16 articles). Some authors insist that incorporating this model by the cultural institutions optimizes resources, particularly improving energy efficiency (Takva et al., 2023).

Authors paid special attention to the use of AI-based technologies (15 articles). AI is introduced to curate exhibitions, enhance personalization, and improve visitor interactions. AI tools are also used to analyze the data and predict visitor preferences. The Mauritshuis in The Hague was presented as an example of an AI-based model where the AI instrument "Muse" is implemented to provide personalized recommendations on artworks (Siri, 2024). Some other models include integration of

AR/VR (14 articles), digital collaboration model (14 articles), data analytics (12 articles), and community-based management (12 articles). Notably, the smallest number of articles (3) concerned using innovative systems while managing cultural institutions. Figure 2 presents the analysis of innovative models of management of cultural institutions.

Figure 2. Innovative Models of Management of Cultural Institutions



The analysis of innovative models of the management of cultural institutions proves that the digital age is revolutionizing the operations of the cultural sector significantly, and various management models appear.

What digital technologies impact the interaction between cultural institutions, the audience, and management processes?

The literary sources demonstrated the profound impact of digital technologies on the activities of cultural institutions, particularly their management processes. For example, some findings revealed the potential of digital technologies to increase the accessibility of cultural collections and audience engagement (Corona, 2021; Li et al., 2022). Some authors describe the positive effect of digital technologies on managing cultural institutions, including planning, communication, human resource management, budget management, and resource allocation (Bannikova et al., 2023; Vărzaru & Bocean, 2024). The authors proved that the efficiency of cultural institutions is enhanced when digital technologies are implemented, mainly when they are helpful during crises (Hall, 2024; Moon, 2020). According to Choi and Kim (2021), the use of

digital technologies in cultural institutions contributed to the change of their role, customizing, the creation of new values, the enforcement of the relationship between an institution itself and its visitors, and, more importantly, the development of sustainability of cultural institutions.

Analyzing the scientific works, it was found that different digital technologies are applied within the process of management of cultural institutions. Most articles reveal the use of VR instruments (47 articles), AI-based technologies (52 articles), Big Data analytics (61 articles), chatbot and virtual assistant (55 articles), and online collaboration tools (108 articles.). The findings show that VR instruments create virtual exhibitions and increase accessibility. Also, VR technology is used to provide cost-effectiveness and organize training of cultural sector experts through simulation-based exercises. AI tools improve routine operations, personalization of visitors' experience, and decision-making procedures. Some works indicate that AI-based technologies are used for content analysis to assess the management strategies of cultural institutions.

Based on scientific works in the field, it was stated that big data can contribute to personalization, predictive analytics, resource optimization, financial management, and cultural event planning. In the literature, special attention was paid to the increasing role of chatbots and virtual assistants. The findings outlined that these technologies provide 24/7 support for the audience, personalization, and multilingual support. Virtual assistants help to organize virtual tours and support visitors with disabilities as well. Online collaboration tools were described as effective instruments for facilitating management procedures in cultural institutions. It was found that they assist team communication, remote project management, and cross-cultural collaboration. Besides, online collaboration tools contribute to improved coordination and crisis management.

Other digital tools used to manage cultural institutions include the following: social media platforms, blockchain, intelligent systems, digital archiving, interactive video content, and gamification. Table 3 presents a detailed analysis of the impact of digital technologies on the management of cultural institutions.

Table 3. Impact of Digital Technologies on the Management of Cultural Institutions

Digital technology	Impact	Number of articles
1. VR instruments	Virtual exhibitions	16
	Increased accessibility	23
	Cost-effectiveness	4
	Training experts in the cultural sector	5
2. AI-based technologies	Automated operations	17
	Personalization	29
	Improved decision-making	22
	Content analysis	4
3. Big Data analytics	Personalization	29
	Predictive analytics	21
	Resource optimization and improved financial management	9
	Event planning	3
4. Social media platforms	Audience engagement	26
	Visibility	11
	Communication and community building	5
	Targeted marketing	7
5. Blockchain	Transparent financial transactions	1
	Enhanced security	5
	Protection of cultural heritage	4
6. Smart system	Visitor tracking	2
	Personalization	17
	Automated ticketing	3
7. Digital archive and repository	Enhance searching	4
	Efficient data management	19
8. Interactive video content	Virtual touring	17
	Education and training	23
	Creation of supplementary content	2
9. Gamification	Visitor engagement	28
	Involvement of younger audience	5
	Repeated visits	2
10. e-commerce platforms	Financial stability	2
	Membership scheme	2
	Operational efficiency	5
	Brand visibility	1
11. Chatbot and virtual assistant	24/7 support	2
	Personalization	23
	Multilingual support	14
	Guided tours	30
	Support for visitors with disabilities	26
12. Online collaboration tools	Team communication	26
	Remote project management	27
	Cross-cultural collaboration	25
	Improved coordination	23
	Efficient crisis management	40

Despite the prevailing positive impact of digital technologies on the interaction between cultural institutions and audiences and management processes, the research requires investigating the barriers and challenges caused by digitalization in the field of culture.

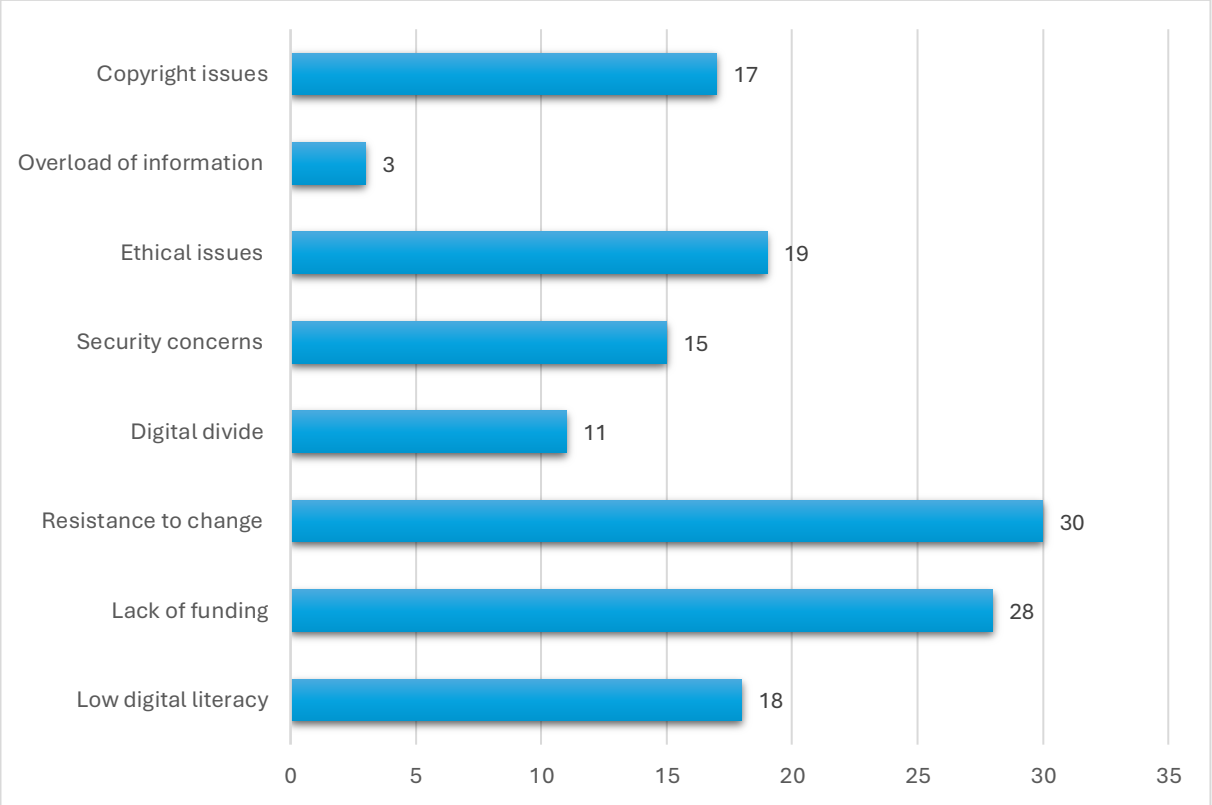
What main barriers and challenges appear while digital innovations are being implemented in the field of culture?

The findings showed that implementing digital innovations in the cultural sector presents specific barriers and challenges. Some articles (18) describe low digital literacy among the employees of cultural institutions. For example, Sanders and Scanlon (2021) revealed low digital literacy among citizens of developing countries and outlined it as a fundamental human right. Other findings indicated low digital literacy among females in comparison to men (Campos & Scherer, 2024) and in rural areas (Wang et al., 2022). The literature review proved that low digital literacy creates a considerable gap in the curation, management of cultural collections, and audience engagement.

Lack of funding was discussed in 28 articles. It was stressed that the implementation of digital technologies in the management of cultural institutions requires additional costs. The shortened budget of the cultural sector in some countries may cause the surface-level of digital transformations and not bring significant improvement (Kou & Chen, 2025). In the context of implementing digital technologies in cultural institutions, Nikolaou (2024) differentiates expenses on technology maintenance, formation of technology skills among personnel, costs associated with technology adoption, and introduction of new technologies created to replace an older version (technological obsolescence). Likewise, Kou and Chen (2025) stress the importance of funding talent support in the cultural sector.

Other challenges include resistance to change (30 articles). This resistance was found to occur at the organizational, individual, and learning-related levels (Scholkmann, 2021). Also, scientific sources associate the digitalization of management processes with copyright and ethical issues and security concerns. Figure 3 shows the overview of the barriers and challenges of using digital technologies to manage cultural institutions.

Figure 3. Barriers and Challenges of Using Digital Technologies in the Management of Cultural Institutions



Addressing these challenges requires comprehensive strategic planning, specific personnel training, and explicit policies on digital ethics. Overcoming these barriers and challenges may contribute to gaining advantages of digital innovation and increase the efficiency of cultural institutions.

Discussion

The examination of innovative approaches to the management of cultural institutions in the digital age is based mainly on management theory (Bachynskyi, 2024; Bannikova & Mykhaylyova, 2023; Skačkauskienė, 2022), which reveals the theoretical principles of organizational effectiveness, leadership, human resources management, decision-making, communication, and performance evaluation. Further, it was revealed that these principles are implemented in the management process of cultural institutions, fostering innovations and positive digital transformations (Bălan, 2023; Kou & Chen, 2025; Pop et al., 2019).

Specific findings revealed that cultural management contributes to elaborating the fundamentals of the effective management system within cultural institutions (Wróblewski et al., 2019). It was found that cultural management is oriented toward

promoting sustainability and innovation in cultural institutions (Mateos-Ronco & Peiró Torralba, 2019). At the same time, several empirical research analyzed during the systematic literature review focused on the practical implications of change management and stated that an open management strategy is widely implemented nowadays (Adobor, 2021; Della Lucia et al., 2024). It allows the transformation of the role of museums and galleries in today's community and increases audience engagement.

Change management was described as a well-designed system assisting in overcoming internal and external changes that appeared due to the digitalization of cultural institutions (Moon, 2020) it was outlined that change management aims to adapt to new changes of the digital age as well as preserve cultural heritage and engage more visitors to cultural institutions using innovative approaches (Polyezhayev et al., 2024). In comparison, the findings demonstrated various changes within cultural institutions. For example, virtual tours, online lectures, digital exhibitions, AI-powered curation, and digital archiving were extensively implemented in cultural institutions during the COVID-19 pandemic (Corona, 2021).

Besides, innovation theory was outlined as a basis for analyzing innovative approaches to management in cultural institutions. According to recent findings, innovation theory is responsible for developing theoretical principles introduced for the improved performance of an institution, the promotion of research and development initiatives, and technological advancement (Suparwadi et al., 2024). Special attention was focused on the advantages of digital innovation to the management of cultural institutions. It was found that innovations cause increased accessibility, cost-effectiveness, automation of routine tasks, and improved decision-making. Some digital technologies (e.g., AI, VR, Big Data) contribute to personalizing cultural projects that enhance audience engagement (Adobor, 2021; Corona, 2021; Li et al., 2022). At the same time, some findings concentrate on the challenges of using digital technologies to manage cultural institutions. They included the following: lack of funding to implement digital technologies (Kou & Chen, 2025; Nikolaou, 2024) and low digital literacy among personnel of cultural institutions that require additional expenses for their training and retraining (Nikolaou, 2024; Sanders & Scanlon, 2021). According to the research results, copyright, ethical, and security concerns are other challenges.

The research on innovative approaches to managing cultural institutions in the digital age has significant implications for theory and practice. Theoretically, it enriches the scientific discourse on digital transformation since it could integrate theoretical concepts and theories from cultural management, innovation theory,

management theory, and change management. These findings can be used to reshape the management strategies of cultural institutions during the digital age and optimize their activities. Practically, the findings offer valuable information for managers of cultural institutions striving to orient toward the complexities of digital innovation. Understanding the advantages and challenges of digital technologies for managing cultural institutions may contribute to creating a sustainable and efficient cultural environment that is attractive to the audience. Moreover, the findings are essential to enhance the resilience of cultural institutions during crises.

Despite several studies on digital transformation in cultural institutions, a significant gap remains in understanding the specific strategies for managing museums and galleries. It was noted that the existing studies mainly focus on digital transformation and audience engagement in the stable landscape. However, there is limited research on the potential of emerging technologies, particularly AI-based tools for personalization, digitalization of archives, and creation of virtual collections, which can assist cultural institutions in maintaining operations during times of instability. Importantly, we found a lack of empirical research concerning preserving cultural heritage during war-affected times.

Conclusions

Concerning the first research question, innovative models based on digital technologies were found to be used in managing cultural institutions. They are aimed at ensuring operational efficiency and increased audience engagement. These models include the following: virtual exhibition, AI-based technologies, integration of AR/VR, digital collaboration model, data analytics, community-based management, sustainable and green management, open access to cultural collections, intelligent systems, and community-driven model. According to the findings, virtual exhibitions, AI-based technologies, integration of AR/VR, and sustainable and green models were most widely discussed in scientific literature.

In answering the second question, it was revealed that digital technologies profoundly impact on the management of cultural institutions. This refers to the increased audience engagement. It was proved that the management processes were facilitated through digital technologies. The findings showed they positively changed planning, communication, human resource management, budget management, and resource allocation. Special attention was paid to the accelerated use of digital technologies to manage cultural institutions, particularly during COVID-19. According to the results of the systematic literature review, digital technologies contribute to creating virtual exhibitions, cost-effectiveness, training organization, routine operations improvement, and personalization.

In the context of the thirst question, it was revealed that specific challenges exist in using digital technologies to manage cultural institutions. Some include lack of funding, low digital literacy, resistance to change, and ethical issues. The findings demonstrate that the challenges appearing in the management process do not exceed the positive effect of digitalization on the environment of cultural institutions. This means that it is worth continuing the digital transformations of cultural institutions.

To effectively implement digital technologies, the recommendations to managers of cultural institutions were outlined to achieve organizational goals and continue the preservation of cultural heritage. Firstly, a digital transformation strategy that integrates technological advancements with the activities and values of cultural institutions is required. This strategy should include long-term goals, mainly branding the institution, engaging the younger audience, and integrating virtual events. Secondly, it is necessary to invest in training personnel of cultural institutions to develop digital skills so they can operate effectively in the digital environment. Regular training programs, workshops, and online seminars can be implemented within personnel training and retraining schemes. Thirdly, digital technologies can be used to support diverse audiences. Special attention must be paid to introducing multilingual virtual assistants, chatbots, audio guides, interactive interfaces, and virtual ticketing. These technologies may create positive experiences among individuals and encourage their revisit.

Future research should focus on developing resilience and adaptation strategies for cultural institutions during war and crisis. The investigation of the impact of digital technologies on the protection of cultural heritage in conflict zones is essential today. It is especially worth studying if one considers the experience of Ukraine, where many cultural institutions face the adverse effects of military aggression. The collaboration of researchers and cultural experts can contribute to developing sustainable and technology-driven management models to protect cultural institutions in times of conflict.

Ethical Considerations

This study was conducted in accordance with ethical standards. Prior to data collection, informed consent was obtained from all participants, to ensure their voluntary participation. The confidentiality and anonymity of all respondents were strictly maintained throughout the research to protect their privacy and well-being.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Exploring the Intersection of Art, Culture, and Contemporary Scientific Discourse

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Abstract

Contemporary cultural and artistic practices are undergoing significant transformations under the influence of digitalization, globalization, and socio-political changes. The study aims to identify the main trends in developing contemporary art practices and analyze their impact on cultural processes. The methodological basis of the study is the structural-functional, discursive, semiotic, cultural, and historical approaches that allow for a comprehensive assessment of the interaction between art and socio-cultural processes. The study has confirmed that digitalization helps to expand access to art and promote cultural heritage, but at the same time, creates risks of commercialization and loss of authenticity of local traditions. It has been found that intercultural dialogue through art shapes new artistic styles but can also lead to the unification of artistic practices. Globalization promotes the interpenetration of cultures but increases the influence of global commercial trends on creativity. The study's practical significance lies in developing recommendations for balancing innovative and traditional artistic practices, which may be helpful for cultural institutions, heritage preservation policies, and educational programs. Further research can be aimed at analyzing the impact of artificial intelligence on artistic creativity and developing mechanisms for preserving cultural uniqueness in the context of digital globalization.

Keywords: *Cultural and Artistic Practices, Cultural Studies, Culture, Intercultural Communication, National Identity, Theoretical and Practical Cultural Studies*

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Introduction

The current day is moving into dynamic cultural transformations unleashed by the swift development of technologies, globalization, and society's social structure. Cultural and artistic practices are important in preserving national identity and developing new intercultural interactions within this context. The art world has left solely its aesthetical expression world and become part of a tool for social change, a way to influence politics and to experiment with technology. Nevertheless, such changes are accompanied by challenges, such as the commercialization of artistic processes, a decline in the authenticity of local cultures, and ethical issues regarding using artificial intelligence for creativity.

In line with the scientific research in this area, it is established that art in the modern age is a multifaceted phenomenon that strongly affects society. Some researchers consider art a mechanism of social integration and a means of shaping national identity (Jameson, 2022; O'Connor, 2025). Others focus on the discursive analysis of art forms, emphasizing their interaction with political and economic contexts (Torrens Rojas & Rodríguez Caso, 2022; Bee, 2024). A separate area of research is devoted to the digitalization of art and its transformation under the influence of algorithmic processes and global media platforms (Shaban, 2024; Park, 2024). Cohen (2024) discusses the dialogue between different scientific approaches, which can help analyze the relationship between cultural studies and other disciplines. Intercultural communication plays a key role in contemporary cultural and artistic practices, as it facilitates the exchange of ideas, styles, and artistic traditions between different cultures. In the process of globalization, art is becoming a platform for intercultural dialogue, allowing for the integration of local art forms into the international context. It is brought out in joint art projects, festivals, international exhibitions, and digital platforms to allow artists to interact with artists from different countries via digital platforms. Intercultural communication also takes part in preserving national identity through the promotion of thinking about one's traditions and adaptation to modern conditions through communicating with other cultures. However, the dominance of world trends may create problems because they facilitate the unification of artistic forms and the reduction of cultural identity. Achieving this requires further research into approaching differences whilst remaining authentic to artistic practice.

Vagelli (2024) studies the scientific styles that can be related to methodological approaches to artistic practices. Torrens Rojas and Rodriguez Caso (2022) consider the globalization of cultural and artistic processes from the perspective of the interaction of local and global. Based on the perspective of Hutson et al. (2024), a neuroaesthetic approach can be used for studying digital art and its perception.

However, several issues have not been resolved despite how much the academic community has paid in cultural and artistic practice. In particular, the problem of preserving local artistic traditions and adapting them to the world space of culture has not been sufficiently studied. It is also necessary to discuss in more detail the impact of digital technologies on the aesthetic perception of art, particularly in the active use of artificial intelligence and virtual reality. Furthermore, there is no accumulated approach to assessing the social viability of art in cross-cultural discussions.

This study aims to identify the main tendencies of developing modern cultural and artistic practices based on globalization and digitalization, as well as their impact on social processes, and trace the pros and cons of conserving cultural identity. To realize this goal, the paper presents conceptual approaches to artistic analysis, discusses various models of interaction between traditional and digital art, discusses how globalization affects cultural heritage, and presents ways to preserve artistic authenticity during technological change.

Art as a Mechanism of National Identity and Social Integration

However, contemporary research in cultural and artistic practices deals mainly with analyzing the role of art in maintaining the national identity, the influence of globalization and digitalization of art, and the integration of modern and unmodern art. They are important processes studied by the structural-functional approach to art, i.e., art as a social integrating mechanism (Jameson, 2022; O'Connor, 2025). The discursive analysis of artistic practices helps us understand their discourse on (artistic) relations with social and political processes, which is also important in global cultural policy (Torrens Rojas & Rodríguez Caso, 2022; Bee, 2024). Most studies regarding the relation of digital technologies to artistic activity focus on its potential to open new possibilities for such activity through further possibilities of artistic expression and intercultural exchange (Park, 2024; Shaban, 2024). They also highlight how standardizing artistic forms and commercializing culture can take away local authenticity (Zhang, 2023), which may happen to other communication methods. Taurino (2023) and Moro and Legale (2023) are other authors who integrate traditional art and new technologies; they are thinking of saving cultural heritage. Specifically, some works have paid attention to the role of intercultural dialogue implemented in the works of the arts worldwide in shaping global cultural identity (El-Hani & Ludwig, 2024; Hayajneh, 2025). Other authors analyze artistic practices' economic aspects, focusing on the development of creative industries and their impact on the cultural economy (Whitaker & Greenwood, 2022; Christofoletti, 2023).

Art as a Medium of Social Change and Political Expression

The issue of art as a tool for social change is also the subject of active academic debate. Researchers draw attention to the performativity, interactivity, and use of the latest technologies that change traditional forms of artistic expression (Kämpfe, 2023b, 2023c; Altun, 2024). In addition, special emphasis is placed on the political dimension of cultural diplomacy and the role of civil society in shaping international cultural relations (Isar, 2022; Ferrara, 2023). The study of the interaction between art and technology also touches upon artificial intelligence and algorithmic art, which are changing creative approaches (Lin & Zhang, 2024; Hutson et al., 2024). Some works focus on the semiotic analysis of contemporary artistic practices and their transformations under the influence of globalization (Kämpfe, 2025; Yichuan et al., 2025). Other researchers focus on preserving intangible cultural heritage and how it can be integrated into contemporary artistic discourse (Kämpfe, 2023a; Hayajneh, 2025). A separate area of research examines cultural diplomacy's development and cultural projects' role in shaping international relations (Christofoletti, 2023; Isar, 2022).

Challenges in the Digital Age: Aesthetic Perception and Cultural Identity

Research also analyses the social function of art, including its ability to reflect social conflicts, construct new social realities, and influence political discourses (White, 2024; Espinoza & Christofoletti, 2023). In migration processes, art is seen as a means of preserving and transforming cultural identity in a transcultural environment (Altun, 2024; Ferrara, 2023). Considerable attention is also paid to museum practices and their adaptation to the digital age, including virtual and augmented reality in creating new exhibition formats (Moro & Legale, 2023; Taurino, 2023). In this regard, researchers raise the issue of new ethical challenges associated with digital technologies, including copyright and intellectual property in digital art (Whitaker & Greenland, 2022; Park, 2024).

Despite the wide range of studies, several problems have not yet been resolved. In particular, there is insufficient research on how digitalization affects the aesthetic perception of art in different socio-cultural contexts. In addition, there are no generalized models for balancing the preservation of local cultural traditions and their integration into the global artistic space.

Methodology

This study uses an interdisciplinary approach that combines qualitative methods of analyzing cultural and artistic practices. The primary method was

structural-functional analysis, which allowed us to consider art as a system that performs certain social functions, including the preservation of national identity, social integration, and the formation of social values. Discursive analysis was also used to explore how cultural practices interact with social, political, and economic contexts to create new forms of artistic expression. The semiotic approach was used to analyze the symbolic meaning of artworks and their visual and conceptual codes. Using the cultural and historical approach made it possible to assess the evolution of artistic processes in the context of globalization and digitalization, identify the main trends, and predict possible directions of their development.

Results

Contemporary cultural and artistic practices are a complex phenomenon encompassing various creative, social, and communicative processes. This study narrowly defines this concept according to how researchers use it. In this sense, cultural and artistic practices are a collection of actions that make, represent, and consume art in a society. These are a unique mode of interaction between the creators, audiences, and cultural institutions (Shaban, 2024).

The structural-functional approach is one of the basic approaches used to analyze cultural and artistic practices. Its point of departure is how art fulfills some social duties, especially how it keeps or preserves national identity, social integration, and critical thinking. In other words, this approach regards culture as a symbolic form of the system that influences the perception and construction of reality (Jameson, 2022).

Discursive is another important approach to dealing with the relationship of artistic practices with social, economic, and political discourses. Artwork is no autonomous phenomenon when affected (affectioned and exhaled) by the socio-social milieu and ideology. O'Connor (2025) notes that 'discourse is important in constructing political reality and is, of course, a form of expression for the arts.'

The postmodernist approach occupies another separate niche within the study of cultural and artistic practices since it concerns the pluralism of such artistic forms, the blurring of the boundaries between 'high' and 'mass' culture, and the expansion of opportunities for artistic expression. According to Park (2024), digitalization and globalization significantly impact artistic processes, which consequently lead to the appearance of new types of artistic communication and the displacement of the traditional centers of cultural impact.

This analysis underscores the intercultural approach as important as it views cultural and artistic practices as a platform for intercultural dialogue. This paper

emphasizes the significance of art in breaking down ethnocultural blocks of understanding, fostering intercultural understanding, and forming a global cultural space (El-Hani & Ludwig, 2024).

As a result, conceptual explanations of cultural and artistic practices are multidimensional and complementary. It portrays the present stages in the advancement of cultural studies and the fact that art continues to be a sphere of creativity and a powerful social means of changing society.

Intercultural communication is of significant importance in maintaining and reforming national identity in the globalized world. It encompasses cultural tradition interaction, the exchange of symbols, styles of expression, and artistic styles. This interaction is one of the primary means of artistic practices, which is not only a means for preserving national values but also for adapting to the environment of a multicultural world (Hayajneh, 2025).

Socio-cultural processes inside the country combine with external factors such as globalization and digital technologies to shape the national identity. Given recent cultural and artistic discourses, it is an essentially dynamic construct. For instance, today's contemporary art reconstructs these traditional images and symbols in new representations that can be read locally and internationally (Zhang, 2023).

Therefore, the impact of intercultural communication on the development of national identity will be analyzed, considering the essential elements of artistic practice.

Table 1. The impact of intercultural communication on national identity through artistic practices

Aspects of Intercultural Communication	Impact on national identity
Cultural exchange	Interaction between cultures enriches artistic traditions and their adaptation to new contexts (O'Connor, 2025).
Globalization of art	The accessibility of the international artistic environment stimulates traditional and contemporary forms of expression (Taurino, 2023).
Digital technologies	Online platforms and digital art projects expand opportunities for cultural dialogue, facilitating cross-national communication (Park, 2024).
Decolonizing culture	Artistic practices reinterpret historical narratives, creating a more inclusive cultural tradition (Espinoza & Christofoletti, 2023).
Museums and exhibition projects	Interactive exhibitions and international cultural initiatives contribute to the preservation of cultural memory and its adaptation to new conditions (Moro & Legale, 2023).

It is an important factor in forming and preserving national identity. It is helpful in rethinking cultural traditions, adapting artistic practices to the globalized world's modern space, and extending cultural dialogue boundaries. It is achieved by the hybrid cultural identity, which, by uniting the old and new artistic techniques, creates new national specifics and helps to develop art through intercultural interaction.

Studying cultural processes is a complicated task requiring an interdisciplinary approach and multiple methodological strategies. Culture in the present-day humanities is conceived not only as a set of objects and traditions but as a dynamic system of meanings, practices, and symbols constantly changing under the action of social, economic, and technical factors (Cohen, 2024). Based on the combination of qualitative and quantitative methods, the definition of a methodological framework for studying cultural processes mechanisms of functioning culture, its interaction with the other spheres of social life, and features of cultural transformations in different historical contexts.

Table 2. Methodological approaches to the study of cultural processes

Methodological approach	**Characteristics and application**
Structural and functional	Analyses culture as a system where each element performs a specific function. It is used to study cultural norms, symbols, and rituals (Jameson, 2022).
Discourse analysis	It studies how culture is constructed through language, texts and narratives. It is used in cultural policy studies, media and the arts (O'Connor, 2025).
Semiotic approach	It considers culture as a system of signs and symbols that convey meaning. It is used to analyse art, advertising, film and literature (Torrens Rojas & Rodríguez Caso, 2022).
Ethnographic method	It focuses on the in-depth study of cultural practices through direct observation and interviews. It is used in anthropology and the sociology of culture (Bee, 2024).
Cultural and historical approach	He studies the evolution of cultural processes in the context of historical changes and the impact of political and social transformations (Vagelli, 2024).

The methodological foundations of the study of cultural processes in the modern humanities include a wide range of approaches and methods that allow us to analyze culture as a dynamic phenomenon. The combination of structural, discursive, semiotic, ethnographic, and historical analysis contributes to a comprehensive understanding of how cultural processes shape, change, and influence society. This interdisciplinary approach allows researchers to identify new trends in cultural

development and predict its further transformations in the context of globalization and technological progress.

The modern world is experiencing rapid cultural transformations driven by two key processes: globalization and digitalization. Globalization intensifies the growth of intercultural relations and crosses traditions and colors. Digitalization creates new instruments of artistic existence and changes both the methods of creation and the perception of art.

Such phenomena are recognized as a complex interplay of the authentic and the commercial, the local and the global, the traditional and the modern, and at the same time, they occur in the scholarly discourse analyzing these phenomena. While digital technologies open up art and interaction better than ever, so do the issues concerning copyright, cultural standardization, and commercializing creativity.

By reviewing current cultural and artistic practice development trends, we can find out how art responds to the new reality and what opportunities are opened for artists and society.

1. Digital art and artificial intelligence. As the digital art sphere continues to grow, one of the biggest trends is the increasing importance of the place of digital art. By now, artists are using algorithms, generative art, and artificial intelligence (AI) to express new visual and audio art types. With technology applied, we can produce paintings, music, and even literary works that are not in the same league as other works. Digitalization also alters the process of creating itself and brings it beyond the creation of works of art. These interactive digital tools permit the artists to experiment with visual and audio effects and create augmented reality (AR) and virtual art (VR), which break free from usual perceptions in art.
2. Global cultural mobility. Due to globalization, art is now easier to reach a global audience. On a global scale, thanks to social media, streaming platforms, and online exhibitions, artists can present the work of their hand from home. Increased directorship of intercultural exchanges and the unification of some artistic movements gave birth to new global artistic movements. On the one hand, this openness promotes the spread of creative ideas, but on the other hand, it increases competition and raises questions about the authenticity of art. Some critics point to the threat of commercialization of culture when art begins to focus on marketing trends rather than aesthetic or ideological values.
3. Virtual museums and exhibitions. The development of digital technologies has contributed to the emergence of virtual museums that allow users worldwide to view exhibitions online. Thanks to augmented reality (AR) and virtual reality

(VR) technologies, artworks can be seen and interacted with. This approach has significant advantages:

- Accessibility: People who cannot visit physical museums can enjoy art online.
- Preservation of cultural heritage: Digital archives help preserve rare artifacts and artworks that may be lost due to time or conflict.
- Expanding the audience: Museums are becoming interesting for art historians and the general public, expanding the circle of stakeholders.

However, digital exhibitions can never fully replace the live experience of art. Actual interaction with paintings, sculptures, or installations creates a unique emotional experience that is difficult to convey through a screen.

4. Gamification of cultural practices. Game mechanics are beginning to be actively used in art and culture. Viewers can contemplate art and participate in its creation thanks to interactive elements. For example, in theatre productions, viewers can influence the development of the plot, and museums are introducing interactive exhibitions that allow visitors to complete specific tasks or themed quests. Gamification helps attract a new audience, especially young people who are used to interactive content and digital technologies.
5. Performativity and interactivity of art. Contemporary art is increasingly moving from traditional forms to interactive practices in which the viewer plays an active role. Performances, flash mobs, interactive theatre performances, and multimedia shows involve the audience as co-creators of the artistic process. Performative art blurs the boundary between the performer and the audience, making the perception of art more individual and deeper. It also meets the needs of modern society for a more personalized experience of interaction with art.
6. Development of creative industries. The creative industries, including design, fashion, film, music, animation, and video games, are becoming a key sector of the economy. They create jobs, stimulate cultural production, and shape global cultural trends. Thanks to digital technologies, artists are getting new opportunities to monetize their work, for example, through NFTs (non-fungible tokens), crowdfunding platforms, or digital exhibitions.

The cultural and artistic practices of contemporaneity are subjected to dynamic evolution under the influence of globalization and digital technologies. The traditional view of culture and art has been broken and is expanding by new art forms like digital installations, interactive exhibitions, generative art, and performances. These changes, however, also cause serious issues to be raised concerning the authenticity of art,

copyright, commercialization of culture, and publication in the global world. The debate within academic circles revolves around the question of how to maintain a balance between innovation and tradition in the artistic realm while also safeguarding cultural, historical, and other values.

However, in today's world, this integration of both traditional and digital art is a possibility to use new creativity, but also many challenges that come with it. Digital technologies allow us to experiment with forms of artistic expression, make interactional works, and reach new audiences. However, such processes also raise questions about the authenticity and copyright of art and the loss of traditional artistic skills. However, the discourse in the field of this topic within academia generally investigates how technological progress and the preservation of cultural heritage coexist. Regarding their digitalization, it is crucial to examine the main challenges and perspectives for developing cultural and artistic practices.

Table 3. Challenges and prospects for integrating traditional and digital art

Aspect	Challenges	Outlook
Authenticity and preservation of traditions	Loss of uniqueness of traditional art due to digital standardization.	Using digital technologies to archive, promote, and adapt traditional artistic techniques.
Copyright and ethics	Infringement of intellectual property rights through the use of AI and digital content.	Development of blockchain technologies and NFTs to confirm the authorship and uniqueness of works.
Accessibility and commercialization	The dominance of commercial platforms contributes to the monetization of art but may affect its value.	Decentralized digital platforms allow artists to interact directly with the audience without intermediaries.
Interactivity and viewer participation	The loss of the traditional role of the viewer as a passive observer changes the perception of art.	New formats of artistic interaction, such as virtual and augmented reality, create innovative experiences.
Educational potential	Insufficient training of artists in the use of digital tools.	Integration of digital technologies into art education, development of new interdisciplinary programs.
Technological dependence	Some art forms are becoming dependent on technology, which can limit their longevity.	Use of hybrid practices that combine traditional and digital methods.

An inevitable process of integrating traditional and digital art is contributing new opportunities for artists and audiences. Digital technology makes it possible to expand access to art, experiment with ways of expression, and develop new projects. This process also has challenges, such as the loss of authenticity, copyright matters, and the commercialization of creativity. The development of cultural and art practices is predicated on a matter of balance between traditional and avant-garde practices and on society's ability to accommodate the digital reality and preserve the cultural heritage.

Discussion

The result of the study shows that cultural and art practice is a multidimensional phenomenon that incorporates both traditional and contemporary forms of expression. However, these interpretations have varied among researchers; they do not approach cultural processes similarly. One example is the supporters of the structural-functional approach (Jameson, 2022), who hold that art maintains social stability, preventing national identity and social integration. Researchers say the same of the discursive approach (O'Connor, 2025) and emphasize that art is not for preserving traditions but for making and constructing social and political narratives.

Finally, a debate concerning digitalizing artistic practices is also an academic affair. According to some authors (Shaban, 2024), digital technologies might be deemed a means to democratize art and facilitate access to cultural heritage and intercultural exchange. Other researchers (Espinoza & Christofoletti, 2023) express concern about the possible leveling of local artistic traditions and their standardization under the influence of global cultural trends. Our study results reflect that both approaches have their basis: digital technologies make art more popularized, but they also can destroy cultural uniqueness.

In other words, another important aspect is the role of art within the discourse of intercultural dialogue. The study confirms that artistic practices preserve national traditions and become a platform for their reinterpretation in a global context (El-Hani & Ludwig, 2024). At the same time, concern is raised by the trend towards commercializing culture, when art becomes an element of market strategies rather than a means of deep cultural expression. For example, on the one hand, digital museums allow for the preservation of cultural heritage (Taurino, 2023). However, on the other hand, they can replace the live perception of art with digital copies, which affects its aesthetic value.

The study's results confirm that cultural and artistic practices preserve traditions and are an important factor in social change. It was found that contemporary

art performs both a stabilizing and transformative function, contributing to preserving national identity and rethinking cultural codes in new contexts. Globalization creates conditions for the spread of new art forms, but this process is not unambiguous and may be accompanied by a loss of authenticity of certain cultural traditions. The study has certain limitations. First, it focuses on general trends and does not consider the specifics of individual regional artistic practices. Secondly, some conclusions may change in the next few years due to the rapid pace of digital development. Thirdly, the study does not analyze empirical data on audience interaction with new artistic practices, which could be a topic for further research. The findings are of great practical importance. They can be used in cultural policy to develop strategies for preserving cultural heritage in the digital age. In addition, they are relevant for educational programs that train specialists in art and cultural management. One can further research the impact of artificial intelligence on art creativity, the processes of digital art commercialization, and the preservation of local cultures in the context of globalization.

Overall, the study's results bear out the important function of cultural and artistic practices in the setting of social change. They indicate that contemporary art combines traditional and new forms of expression, forming new cultural relationships. Despite the contradictions between different approaches to analyzing art, it is clear that it remains a powerful means of communication that can preserve and transform society.

Conclusions

Contemporary cultural and artistic practices demonstrate the preservation of traditions and the active integration of the latest technologies, which changes the nature of artistic communication. New opportunities for creativity are opened up by digitalization, as the research has also revealed. However, at the same time, it poses risks for the unification of art and the loss of the local cultural identity. The analysis gives results that support the idea that the spread of artistic processes in globalization enhances intercultural dialogue. However, the growing commercialization of cultural products also results in the restriction of their authenticity. The novelty of the work lies in the combination of structural-functional and discursive approaches to the study of cultural and artistic processes, which allowed for a comprehensive assessment of their impact on society. The study's main limitation is its focus on general trends, while further work could focus on empirical analysis of the impact of art on different social groups. The practical implications of the study's findings are manifested in cultural policy, education, and cultural heritage preservation, especially in the context of digital transformation. Further research could include studying the role of artificial intelligence in art, analyzing the mechanisms of balancing globalization and local

cultural traditions, and investigating the impact of new technologies on the processes of artistic perception. It is important to continue the interdisciplinary analysis of artistic processes, as their dynamics reflect the change of artistic forms and broader socio-cultural transformations.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Death, Defilement, and the Sacred: Navigating the Pollution–Purity Dichotomy in Ancient Indian Funerary Rites

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Abstract

This article looks at ritual purity, pollution, death, and varna within Hinduism, especially regarding how these ideas were codified, contested, and ritualized within normative Sanskrit texts. This research portrays death as both a physical event and a metaphysical transition that creates a fundamental crisis for ritual and sociocultural order. The secondary scholarly sources of Dharmaśāstra literature, Gṛhyasūtras, and Purāṇas capture a complex set of rules regulating impurity (aśaucam) and mourning and post-funerary observances related to death. Importantly, death creates not just bodily and spatial pollution but pollution so substantial that custom dictates it warrants long, complex rites of re-integration so the individual or family can start to rejoin a normative social and cosmic order. This study further brackens how impurity, normatively related to death, is differentially regulated based on one's varna (social category) and gender and links the deeply relational and embedded hierarchies in ritual ideals. The intent here was to begin to show, through tightly engaged textual reading and secondary scholarship, that it was important to see the regulation of death and its impurities as more than a religious phenomenon. Death and the realities of its impurities were more than a religious practice; they were a mechanism for establishing and enforcing social boundaries and the structured delineation of principles outlined in varna-based categorizations. By situating death within the discourse of purity and pollution, the paper contributes to understanding how ritual and social hierarchies were constructed and sustained in early Indian society.

Keywords: *Aśaucam, Death, Hinduism, Ritual Purity, Varṇa*

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Introduction

Death is not just a moment of rupture at the individual and the family level but of social and cultural importance. In the Brahmanical tradition, death does not simply equate with the cessation of biological life; rather, it initiates a liminal phase - a transient and ambiguous state - which a range of ritual codes must mediate. The rituals are not just metaphysical responses to the experience of death as delineated in the *Dharmaśāstra* and *smrti* literature. They are institutional devices of social regulation and vehicles for ethical and moral judgments. By invoking categories such as *aśauca* (impurity) and then reinstating a state of *śuddhi* (purity), these rites mark the restoration of a disturbed social order and depict hierarchy, especially in terms of *varṇa* and *āśrama*.

At the heart of these practices, we find *aśauca* (impurity) and *śuddhi* (purity), which mark the limits of ritual pollution and how it is eventually purified. This is not just about spiritual purity; this process also articulates social norms and collective values. The mourning, abstinence, and social exclusion rites that the bereaved abide by serve to train expressions of kin and caste group behavior and reinforce claims of collective responsibility regarding death pollution. These codes are also heavily gendered and stratified, with more emphasis on women and lower castes, and they reinforce the hierarchy embedded in the social order. In addition, the rites play double duty: they prepare and purify the dead as they transition to taboos in the ancestral realm (*pitṛloka*) through *śrāddha* (ceremonies for the dead) and *piṇḍa* (offerings in the shape of rice balls) while at the same time allowing the living to reclaim their rightful cosmic and social order. They represent symbolic re-entry processes; most basically, they convert death into an occasion for social regeneration.

Additionally, as we scrutinize the rituals, we appreciate some of the larger cultural anxieties around death and the afterlife. While we have highlighted the fact that these codes are aimed at helping a return to normalcy, we have also shown the inherent instability of social boundaries and that it is also a practice of reaffirmation. Andreas Bendlin's hemispherical analysis of Greek ritual practices provides a comparative perspective. Bendlin suggests that the antithesis of pollution is not purity but normalcy- a restoration of the social order post-death (Bendlin, 2007). This understanding reinforces the broader anthropological argument that rituals are less about the quest for spiritual purity and more about reconstructing the social order disrupted by untimely loss.

In this context, this study seeks to address a critical gap in the current scholarship on death and ritual pollution in Brahmanical texts. Much has been written about the theological implications of these rituals. However, the way they act as social

instruments of social control, as well as their influence on the performance of gender and caste hierarchies, is still an under-researched area. Our framework examines how metatheory, social ethics, and ritual employments come together to show how these texts truly reflect and shape group cultural norms, helping to construct a more social-constructivist model of death as another phenomenological experience and not simply as an end to the biological aspects of life.

Methodology

This research employs a multidisciplinary textual and interpretive strategy, using historical, gender, and symbolic anthropology to investigate the ritual construction of death, impurity, and social hierarchy in the Brahmanical tradition. This research is primarily based upon a critical reading of prescriptive Sanskrit texts, specifically, the *Dharmaśāstra, Garuḍa Purāṇa*, and an assortment of *smṛti* texts, which also constitute the pivotal sources for the study of the ideological models that form the basis of death rituals in early India. Stated simply, the methods for the study reflect a careful philological and hermeneutic investigation of the key Sanskrit terms *aśauca* (impurity), *śuddhi* (purity), *sūtaka* (birth impurity), and *piṇḍa* (ancestral offerings), focusing on their referential range and ritual meanings across Brahmanical texts. The goal is to analyze these central terms as categories that do not simply exist as prescriptive doctrines but as constructed cultural categories that conform to social hierarchies. In constructing its theoretical framework, the study also draws on theoretical insights from symbolic anthropology and positions it with authors such as Mary Douglas, Louis Dumont, Victor Turner, and Margaret Trawick in addition to South Asianists like Patrick Olivelle and L.M. Mines. The theoretical background positions the ritual codes of Brahmanical traditions in a coordinated fashion with the social and cultural regulation of caste, gender, and morality, suggesting that ritual performance contributes to maintaining the Brahmanical view of human mobilities. The focus is on seeing these texts as cultural artifacts that encode disciplinary norms and moral hierarchies, not prescriptive codes of conduct. This permits a more nuanced understanding of death-linked rituals within their superstructure of social ethics, purity, and cosmological order.

Findings

Hierarchy and Impurity: Ritual, Gender and Liminality

In the context of death, the departure of the *jīva* (life force) from the body marks the beginning of a temporary state of ritual impurity (aśauca) for the kin of the deceased. During this time, the grieving is subject to certain prohibitions or restrictions

concerning cooking salted food, personal grooming, and sexual activity. This stage of isolation and rejection is sometimes considered a type of ritual incapacitation (Mines, 1989). The Garuḍa Purāṇa also designates this period *sūtaka* in multiple passages. Notably, the lexicon related to impurity bears strong family resemblances to other life-cycle events. For example, *śūtikā* identifies a woman who has just given birth, while *rajasvalā* identifies a woman who is currently menstruating—again, ritually impure within Brahmanical paradigms. In terms of menstruation, in particular, a woman regains ritual purity typically by taking a purificatory bath, after which she may resume her daily ritual activities. During menstruation, however, she has been excluded from various ritual and domestic activities—with the understanding that this impurity is temporary but socially relevant. The ritual exclusions are thereby reinforcing a patriarchal sacrality in locating impurity (and therefore social vulnerability) within the female body and reproductive functions.

The conceptual linkage between menstrual impurity, miscarriage, and death impurity is significant. Other cultural contexts also show this symbolic linkage between bodily states and liminality. These states share an underlying symbolic logic that connects them to the liminal space between life and death. Drawing on the theoretical insights of Mary Douglas (1966), particularly her engagement with Lévy-Bruhl's notion of "primitive mentality," one finds that impurity is often attributed to transitional or indeterminate states. For example, the Maori of New Zealand regarded menstrual blood as a form of unrealized potential life—what Lévy-Bruhl described as a "human being manqué." In this view, menstrual blood embodies a paradox like that of the deceased, who has left the living world but has not yet been ritually reintegrated through death rites. Thus, death-related impurity renders those associated with the deceased as marginal beings, temporarily removed from normative social and ritual life. In the aftermath of Douglas' argument that "dirt is just a matter of disorder," death is an event at which both social and cosmological orders are impeded and require rituals to reorder and reintegrate both the body and society. Rituals of death restore their purity and reintegrate them into the social fabric. Therefore, they indicate closure as people move from a state of being sequestered back to the rhythms of everyday life.

Hierarchy and Impurity: Varṇa, Guṇas, and Social Regulation

The period of primary pollution (*aśauca*) following a death is not uniformly observed across social groups; rather, it varies according to varṇa (caste), place of residence, and the mourner's relationship to the deceased. Even if people only encounter the body or the family of the deceased, they may also experience a somewhat minor form of ritual impurity that simple acts can purify. The nature and condition of the deceased person at the time of death can also change the extent and

duration of the pollution experienced by the survivors. Within Brahmanical texts, those most affected by the pollution associated with death are typically the sāpiṇḍas—relatives connected through seven generations on the paternal side or five on the maternal line. The period of pollution was differentiated according to varṇa, with brāhmaṇas said to observe ten days of impurity, kṣatriyas twelve days, vaiśyas fifteen days, and śūdras a full month (Garuḍa Purāṇa II.36.64–65). This gradation in the duration of ritual impurity has been subject to diverse interpretations. Dumont (1970) argues that the shorter pollution period for brāhmaṇas reflects a form of social privilege in which those responsible for codifying ritual norms reduced their own burdens. His perspective has been supported by scholars such as Tambiah (1973) and Marglin (1985), who suggest that the abbreviated duration of impurity for brāhmaṇas may reflect a self-serving minimization of austerities. In contrast, Kane (1941) proposes that brāhmaṇas, due to their essential ritual duties—such as daily rites and Vedic study—were encouraged by dharmashāstric texts to reduce the duration of *aśauca*, lest prolonged impurity promote neglect or "laziness" in fulfilling their spiritual responsibilities.

Orenstein (1970) offers a more systematic framework that links the concept of pollution to proximity with organic life. According to his analysis, caste hierarchy is structured around differing degrees of 'normal impurity': lower castes are viewed as being more intrinsically involved with biological processes, while upper castes are symbolically aligned with spiritual purity. Orenstein's argument draws heavily from Stevenson's (1954) interpretation of Hindu notions of pollution, which emphasizes ritual impropriety as a critical negative standard for regulating social status and behavior. Similarly, Dumont (1970) and Pocock (1972) assert that the caste system rests on a priestly, hierarchical opposition between the "pure" and the "impure," with the former associated with spiritual transcendence and the latter with the worldly and biological. In this schema, impurity arises from contact with organic processes of life and death, whereas purity is achieved through symbolic and physical separation from such contact.

In contrast to earlier interpretations that conceptualize ritual impurity in terms of contact with organic life (Orenstein, 1970), Mines (1989) has proposed an ethno-social model that reframes the concept of death-related pollution within the framework of guṇic qualities. Her approach offers a counterpoint to the Western philosophical tendency to valorize "pure spirit" over "impure flesh," which, she argues, has unduly influenced the analysis of Hindu death pollution. By categorizing varṇas according to their predominant guṇas—*sāttvic*, *rājasic*, and *tāmasic*—Mines suggests that the duration of impurity corresponds to a varṇa's intrinsic constitution. According to this model, brāhmaṇas, deemed to possess a high degree of sattva and minimal tamas, undergo a ten-day period of pollution. Kṣatriyas, who are slightly lower in

sattva and exhibit a stronger presence of rajas, are impure for twelve days. Vaiśyas, classified as more *tāmasic* and less *sāttvic*, observe fifteen days of pollution; however, their participation in purificatory rituals, like the higher varṇas, places them in an intermediary position. Śūdras, identified with predominantly *tāmasic* qualities and lacking access to ritual refinement, are assigned the longest period of impurity—one month (Mines, 1989; Garuḍa Purāṇa, II.36.64–65).

Deviant Deaths and Truncated Rites

Notably, the prescriptive texts extend beyond the guṇa-based and organic frameworks to encompass moral and social deviations. Cases of untimely or "bad" deaths often result in reduced or entirely absent impurity periods. Such deaths—interpreted as consequences of moral transgressions in either the present or past lives—render the deceased unworthy of traditional mourning. For instance, women who died under stigmatized circumstances (e.g., adulterous wives or remarried individuals) triggered a mere three-day pollution period for their kin. Similarly, those who transgressed the varṇa order—such as individuals with illegitimate familial ties or women who died post-marriage—elicited abbreviated impurity durations, often two days and one night, with ritual duties like *tarpana* (water libation) divided between the natal and marital families. These textual prescriptions reveal a dual meaning behind the allotment of impurity periods. On the one hand, they reinforce varṇic hierarchy, where diminished durations signal elevated spiritual status. On the other hand, truncated observance may serve as a moral indictment, reflecting perceived social deviance and unfulfilled duties. Individuals whose conduct was deemed sinful were symbolically excluded from the ritual structure. Their impurity periods curtailed as a mark of disgrace not just upon themselves but upon their *sāpiṇḍas* as well. Hence, pollution becomes both a tool of social regulation and a mechanism for reinforcing normative order.

Beyond its function in upholding moral order, lineage also played a critical role in determining ritual purity and pollution. In cases of both birth and death, matrilineal ties did not typically result in significant ritual impurity. For instance, only a ritual bath was prescribed upon the death of certain maternal relatives such as a son-in-law, daughter's son, sister's son, maternal uncles and their wives, or brother-in-law and his son. This exclusion is rooted in the śāstric conception of the *sāpiṇḍa* group, where a woman, upon marriage, was understood to become wholly incorporated into the gotra and *sāpiṇḍa* lineage of her husband. Consequently, she no longer generated ritual pollution for her natal kin upon death, nor did she observe it for them (Kane, 1941). A

similar detachment from kinship-based pollution applied to ascetics and student-celibates (*brahmacārins*), who were considered ritually exempt from both birth- and death-related impurity. Due to their adherence to a life of renunciation and celibacy, ascetics were believed to have transcended the cycle of birth and rebirth. Their bodies were considered sacred, and no ritual pollution was thought to arise from their death (Orenstein, 1970). In fact, śāstric texts emphasize that if a king were to mishandle the corpse of an ascetic, it could result in the destruction of his kingdom. Similarly, villages could suffer distress or misfortune if the funeral rites for ascetics were neglected or improperly conducted (Parry, 1994).

However, the denial of pollution in such cases did not imply a complete avoidance of funeral rites; these were still performed, though they did not entail the same ritual consequences for the *sāpiṇḍa* group. The exceptional purity attributed to ascetics effectively dissolved conventional kinship obligations. Their kinsmen were not required to observe the usual period of pollution, and any residual impurity was considered insignificant. Nonetheless, this exemption was conditional: it applied only if the ascetic remained faithful to their *svadharma* (personal religious duty). Deviation from this prescribed way of life reinstated their ritual vulnerability, subjecting them to the norms of pollution once again. These exceptions underscore the dynamic nature of ritual purity in Brahmanical discourse. Factors such as kinship ties, social ranking, gender, and adherence to prescribed roles influenced the observance or denial of pollution. Thus, ritual impurity cannot be understood solely in biological or genealogical terms; it must also be situated within broader social and religious frameworks that govern identity and moral conduct.

Exceptions and Exemptions: Ascetics, Women and Ritual Boundaries

While primary death-related pollution affected individuals differently across the *varṇas,* the rules surrounding the interaction with *sāpiṇḍas*—kin typically defined through patrilineal descent—offered further insight into the graded structure of ritual impurity. After the completion of one-third of the total period of pollution, or upon the collection of the deceased's bones, *sāpiṇḍas* could be touched again. This threshold varied according to *varṇa*: for *brāhmaṇas,* it was the third day, for *kṣatriyas* the fourth, for *vaiśyas* the fifth, and for *śūdras* the tenth day (Garuḍa Purāṇa II.36.64–65). During this period, not only the *sāpiṇḍas* but their households were considered entirely inauspicious, reflecting what may be understood as "external pollution," a concept that denotes impurity transmitted through physical contact with a ritually defiling substance or individual (Dumont, 1980). This notion of physical contagion was tightly bound to social norms and hierarchy. The corpse of a *śūdra* was considered more polluting than that of a *brāhmaṇa*, reinforcing notions of ritual hierarchy. Nonetheless,

the act of a *śūdra* carrying the corpse of a *brāhmaṇa* (or vice versa) was marked as sinful unless the deceased was an orphaned *brāhmaṇa*, in which case such an act was valorized and considered spiritually elevating (Kane, 1941).

Participation in funerary rites or even exposure to the smoke emitted from the burning of a corpse required immediate purification through bathing. This applied not only to kin but also to ascetics, *brahmacārins*, and kings who took part in the cremation rituals. These individuals were deemed purified by touching fire and consuming clarified butter (*ghṛta)*. However, if a non-sāpiṇḍa individual consumed food in the house of the deceased, they incurred a ten-day period of pollution. Likewise, if a *brāhmaṇa* officiated or participated in the death rites of another *brāhmaṇa*, he observed a ten-day impurity period. When the deceased was a *kṣatriya, vaiśya*, or *śūdra*, the respective duration was six, three, and one day, illustrating the hierarchical scale of pollution (Parry, 1994). It is worth noting that these explicit influences of hierarchically defined separate class statuses were not present for the other three *varṇas,* which further illustrates the heightened ritual status of *brāhmaṇas*, who nominally had responsibility for ritual purity and managing its transmission to others.

The hierarchy did not merely stop with the sin of death, as the same pollution patterns extended to what he claimed were the separate cases of "attached pollution" or "external pollution" in cases of social hierarchy. So, if the deceased died a higher status than the servant or disciple, the latter would have to observe the same period of pollution as the master or teacher. In effect, contamination was symbolically transferred. In this system, social rank produced did not work reciprocally, i.e., the death of a slave or disciple did not contaminate the master or teacher at all in any way (Firth, 1970). Hence, there is a directed asymmetrical flow of impurity, or pollution, depending on how social statuses and rank scale up. A particularly revealing case is that of a *śūdra* woman dying in the household of another. Her death rendered the house impure, necessitating that the premises be swept with water on the third day and that all household vessels she had touched be discarded. No other rituals were mandated. This instance further illustrates how lower-caste individuals, especially women performing domestic labor, were perceived as carriers of impurity. However, the pollution incurred was not equal to that of a master's death, demonstrating a stratified view of ritual obligations even within the broader *varṇa* system. In sum, the system of death-related impurity was deeply intertwined with notions of social hierarchy, ritual agency, and bodily pollution. The regulation of such pollution served as a post-mortem protocol and a reflection of the living social order. It reinforced *varṇa* distinctions, gender roles, and social responsibilities, functioning simultaneously as a codification of the dead and an instructional blueprint for the living.

Discussion

This research shows that Brahmanical death practices serve as an effective structural process (through the codes of purity (*śuddhi*) and impurity (*aśauca*) of social order. Death rites do not merely respond to death in some metaphysical sense; they are more properly concerned with stratifying social order based on *varṇa* (caste) and gender. Additionally, it emphasizes that there was a hierarchy, or stratification, of the duration and gravity of death impurity, dependent on caste status, the relationship to the deceased, and the implications of gender in the ritual practice. As an illustration of this stratified complexity, the Brahmanas were prescribed a much less severe mourning period than other caste groups. Although this can be taken to mean that their shorter period was a pragmatic response to surviving ritual obligations, it is also reflective of their higher status in the social order. In this regard, the shorter death impurity period of Brahmanas contributed further to their authority and highlighted the ideological role of death rites in maintaining the logic of caste privilege. In these diverse cases, death rites logically followed a cultural practice which, in this case, used codes of purity and impurity to maintain social boundaries and the Brahmanical disposition of normal.

The research also indicates that death impurity is not merely a biological or emotional reaction to death but a managed symbolic state that has a functional role in achieving social cohesion. It draws from symbolic anthropology, specifically the work of Mary Douglas and the work of Victor Turner in tracking *aśauca* as a liminal state that creates social and cosmological disarray. In fact, the effluence of death pollution requires a ritual to contain, a ritual that, if uncontained, would make society and the cosmos disintegrate. The *śrāddha* (ancestor rites) and *piṇḍa* rites are conceptualized as ritual mechanisms of re-integration, returning both the deceased and relations back into the order of normative society or re-establishing the place of the person within the cosmic cycle.

In a particularly significant finding, death impurity is shown to overlap with other ritual pollutants, such as pollution rules around menstruation and childbirth. The analysis demonstrates that the status of women is an observable or visible example of concerns about the pollution of the female body, which is much more often ritually dealt with as a "threatened" or "at risk" ritual state. In this case, the rationality of Brahmanical culture pervades, where the female body is ritually ordered and disciplined to generate social stability, lest purity and pollution run amok. The layering of pollution codes showcases a multifaceted system of control, mediated by gender and caste, to evoke different ritual provocations for women and lower caste individuals. In addition, this study complicates the existing binary of pure and impure

as moral absolutes regulated within a transactional process of restoring normative functionality in the Brahmanical universe. Impurity in the rituals described in this study does not mean that established and recognized sites of impurity are a specific moral state but that they exist as ritual provocations designed to call people back to a " normal " state. This finding aligns with the broader anthropological perspective that rituals are not merely symbolic performances but critical acts of social maintenance, where the metaphysical intersects with social bodies' material and moral regulation.

Lastly, this research has argued that death rites framed as sites of action are also dynamic and sites of stratification, exposing ways to act out death-as-social-regulation, which include metaphysical beliefs, that degree of communion, and connection with social life. In examining the semantic, prescriptive, and symbolic nature of the death rituals in this study, I hope to have shown a much wider example of how death-as-personal-loss and death-as-social-regulation can offer a much better analytic understanding of death in the Brahmanical tradition.

Conclusions

This study shows that the Brahmanical idea of pollution is not a mere assortment of ritual prescriptions but rather a highly intricate sociocultural system that reflects profound structures of social hierarchy, kinship, and moral order in ancient India's historically defined social assemblages. The analysis of *sāpiṇḍa* relations, moral violation, and the codes of impurity circulating around death demonstrates how purity and pollution are conceptually linked and become important regulatory structures that uphold the distinctions between *varṇa*, enforce social action and create ritual boundaries, all of which sustain the Brahmanical cosmology. An emergent theme is that purity and pollution are not fixed or absolute categories but are contextualized conditions according to lineage, caste, gender, and the specifics of the death. Pollution constitutes a physical condition and a symbolic expression of social and cosmic disorder, which can be passed through blood or social affiliations. Purity is restored either by participation in rituals, association, or proximity to people with ritual superiority, mainly the *brāhmaṇas*. This reinforces a hierarchy where restoring a person's purity is an important marker of status and authority, given that restorative power is concentrated in Brahminical forms. Additionally, the work also indicates the gendered nature of these codes, namely through the disproportionally high ritual burden shouldered by women and lower castes (who are positioned lower on the hierarchical order) because of their marginal and less preferred positionality in relation to the masculine ideal. This context prompts observations regarding the broader cultural rationality which values and constant regulation of the female body, often

considered ostensibly at ritual risk, and notes that this analysis allows one to affirm gender and caste as both key sites of social stratification but also highlights how certain kinds of ritual impurity substantiate and duplicate these distinctions. In the end, the work claims that death is not simply a moment of personal loss or transitive metaphysical shift; it is a socially important zone of reaffirmation and control. By placing death rites within socio-political contexts, this study furthers our understanding of Brahmanical death codes perpetuating cultural continuities, establishing normative boundaries, and handling the mundane aspects of death and afterlife considerations. It goes beyond this to contribute to a larger understanding of how ancient Indian society demarcated ritual hierarchically prioritized moral order. It also provides useful insights for ongoing Investigation in the anthropology of religion, ideas of power, and forms of social organization.

Conflicts of Interests

The author declares that there are no conflicts of interest regarding the publication of this paper.

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Article

Strategies for the Preservation of Cultural Heritage through Art and Education: A Comprehensive Approach and Evaluation of Effectiveness

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Abstract

In an increasingly globalized world, preserving cultural heritage is essential for maintaining cultural diversity. This study examines strategies for safeguarding cultural heritage through integrating art and education, emphasizing the significance and effectiveness of a comprehensive approach. Employing a quantitative methodology and systematic review guided by the PRISMA framework, 60 international sources were analyzed through a multi-stage screening process. The results demonstrate that combining art and education significantly enhances efforts to preserve cultural heritage. Artists play a key role in stimulating public interest and academic inquiry, while educators foster value formation and actively engage students in cultural studies. This integrated approach deepens emotional connections to heritage and broadens awareness of its importance. Nonetheless, such strategies are often hindered by financial limitations, insufficient management, and a shortage of specialized professionals. The study concludes that evaluating the effectiveness of cultural heritage preservation requires a flexible, multidimensional approach, incorporating both quantitative and qualitative measures. Overcoming these challenges is vital to achieving sustainable preservation outcomes.

Keywords: *Artistic Intervention, Cultural Management, Educational Integration, National Heritage*

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Introduction

The current realities of civilizational transformations, which have led to new threats to the preservation of cultural heritage, have led to increased attention to the mechanisms of cultural protection. Given the conditions of rapid globalization and scientific and technological progress, such a research problem as the protection of cultural heritage has become significantly more relevant as new challenges and threats to cultural diversity and the preservation of various types of cultural property have emerged. This, in turn, influenced the evolution of forms and methods of cultural protection activities. Thus, preserving cultural heritage is one of the most critical tasks of modern society (Arfa et al., 2022; Boboc et al., 2022). Given this fact, traditions, customs, language, historical and cultural monuments, artworks, and architectural monuments contribute to the formation of national identity and play an essential role in preserving cultural identity. This issue is critical and relevant in modern scientific thought. Modern scholars have described various mechanisms for preserving cultural heritage in cooperation with UNESCO (Daga et al., 2022; Williams et al., 2021). In addition, the importance of any initiative to preserve cultural property has been proven by scientific thought (Kichurchak, 2020; Monova-Zheleva et al., 2020). Accordingly, an important research question is identifying strategies that most effectively preserve this heritage. The study of this issue is important from a theoretical and practical perspective, as this research aims to provide insights into essential mechanisms for preserving cultural heritage through art and education.

Given the small number of studies on the complex impact of art and education, this research problem is essential to study. Education and art play the role of essential tools that have the potential not only to preserve but also to transmit cultural values to modern society. Using an integrated approach, studying the specifics of preserving cultural heritage through art involves synthesizing creative practices with various educational initiatives. The latter are usually aimed at raising public awareness and interest. The importance and relevance of this study lies in the growing threat of losing cultural heritage due to various challenges (military operations, accelerated urbanization, transformations in the value system, technological changes) requiring the development of new effective strategies for cultural preservation. At the same time, it is also important to characterize the effectiveness of the current existing mechanisms of cultural preservation. It is also essential to focus on how education and the arts interact to actively engage society in preserving historical and cultural property. Knowledge of practical approaches will ensure the preservation of cultural heritage and support its development in the modern context.

This literature review aims to identify the main aspects of the study of cultural heritage in modern scientific literature. Modern studies describe various aspects of the preservation and reproduction of cultural heritage. Andrec (2024) is devoted to preserving Ukrainian cultural heritage through the prism of the diaspora. The author mainly focuses on the activities of special research centers in the United States. Beidyk et al. (2024) described the role of the intangible cultural heritage of Ukraine through the prism of studying its scientific and practical significance. The authors also described the key prospects for developing this type of heritage. Chetverikov et al. (2024) carried out a research development of a software module to study and research various objects of historical and cultural heritage. In general, according to the results of modern scholars, the process of preserving and protecting cultural heritage is not only one of the most relevant areas of activity of countries but also serves as an important subject of research in several sciences (Harbuziuk et al., 2023; Koh & Jamal, 2024; Kurniasih et al., 2024). Contemporary scholars have also identified the importance of preserving cultural heritage and studying its forms or mechanisms in the protection system. These studies constitute an important theoretical basis for the article, as they are intended to create a theoretical and methodological framework for a general understanding of the specifics and essence of the process of cultural heritage preservation on both national and international scales. (Mendoza et al., 2023; Nindito et al., 2020; Kou, 2024). Zort et al. (2023) describe the key forms of disseminating information about cultural property, including through storytelling. Van de Kamp et al. (2014) describe the role of virtual reality in transforming and further developing art. Some forms of preserving cultural heritage using modern technologies are presented in detail in the study by Fiorineschi et al. (2020) and Georgopoulos (2018), who also provided a critical review of current digital technologies that contribute to the preservation of cultural heritage. Also noteworthy are those studies that provide a detailed analysis of the institutional framework for the preservation and protection of cultural heritage (González-Herrera et al., 2023; Liu & Pan, 2023). These foundations are essential, at least from the point of view that it is through the relevant institutions and norms that a reliable basis for the practical adaptation of the general system of measures for the preservation and reproduction of cultural heritage to individual national realities is formed (Kleftodimos et al., 2023; Moula & Kouzoukakis, 2023; Losheniuk et al., 2023). An important part of this review is the analysis of studies that focus on the peculiarities of teaching art in the modern era. In general, contemporary scholars have identified the powerful impact of digital technologies on art and its study (Brown & Duffy, 2013; Camuñas-García et al., 2024). Afanasieva (2023) conducted an important study of virtual reality's impact on future art professionals'

professional development. At the same time, Cherusheva et al. (2023) described the main innovative technologies that support and develop modern education in the EU.

Datsko (2023) outlined the main reforms concerning the higher education system. The author drew attention to the undeniable impact of digitalization trends on this process and described the role of virtual reality in maintaining students' attention and developing their motivation to learn (Devadze & Gechbaia, 2024). Panyok (2023) described current trends in the development of art in Ukraine. Sermet and Demir (2020) identified the important role of augmented and virtual reality in shaping the modern learning environment. These technologies develop not only theoretical but also practical skills. In addition, Goian et al. (2023) described innovative teaching methods used to engage and support students. Contemporary scholars have drawn attention to the importance of using modern innovative technologies in the art teaching system (Iyuan, 2023; Karas et al., 2021). However, the chosen topic requires more thorough study. The main gap is that the authors did not pay attention to the synthesizing role of art and education to preserve cultural heritage. If this issue is present, it is only in certain aspects. However, no broad study of this topic has been conducted. Accordingly, this study will try to address this gap.

This study aims to analyze the main strategies for preserving cultural heritage through art and education and assess their effectiveness in maintaining national and cultural identity. Particular attention is paid to the relationship between art and education based on effective cooperation mechanisms. Combining artistic activities with the educational process forms a comprehensive approach to work in the cultural sphere. An important aspect is the creation of a system for evaluating cultural heritage preservation strategies based on a flexible approach that considers both quantitative and qualitative indicators, as well as local cultural development. Considering these aspects allows us to better understand the main problems associated with preserving cultural heritage and ways to solve them through the interaction of art and education.

Methodology

This study adopts a quantitative research design grounded in content analysis, which systematically examines scientific literature related to the intersection of cultural heritage, art, and education. The research focuses on identifying, categorizing, and interpreting data from academic sources to reveal patterns, trends, and best practices in cultural heritage preservation. By analyzing published materials, the study aims to evaluate how educational programs, and cultural institutions interact to safeguard heritage through artistic engagement. The objectives of this study are fourfold: to investigate methods and approaches used in art education; to explore the

role of artistic practices, both traditional and contemporary, in transmitting cultural values; to assess emerging trends in educational strategies for heritage preservation; and to examine international experiences in implementing heritage-focused educational and cultural initiatives.

The sample for this study included sources from different parts of the world. There was no specific geographical range for the sources to be included. Preference was given to including scientific literature from 2020. However, the study used several older works due to their importance for the chosen topic. The sample included various research papers: scientific articles, monograph chapters, and conference proceedings. When selecting the materials, attention was paid to including papers from global peer-reviewed journals.

This study employed the PRISMA approach, enabling the collection and qualitative analysis of scientific sources (Figure 1).

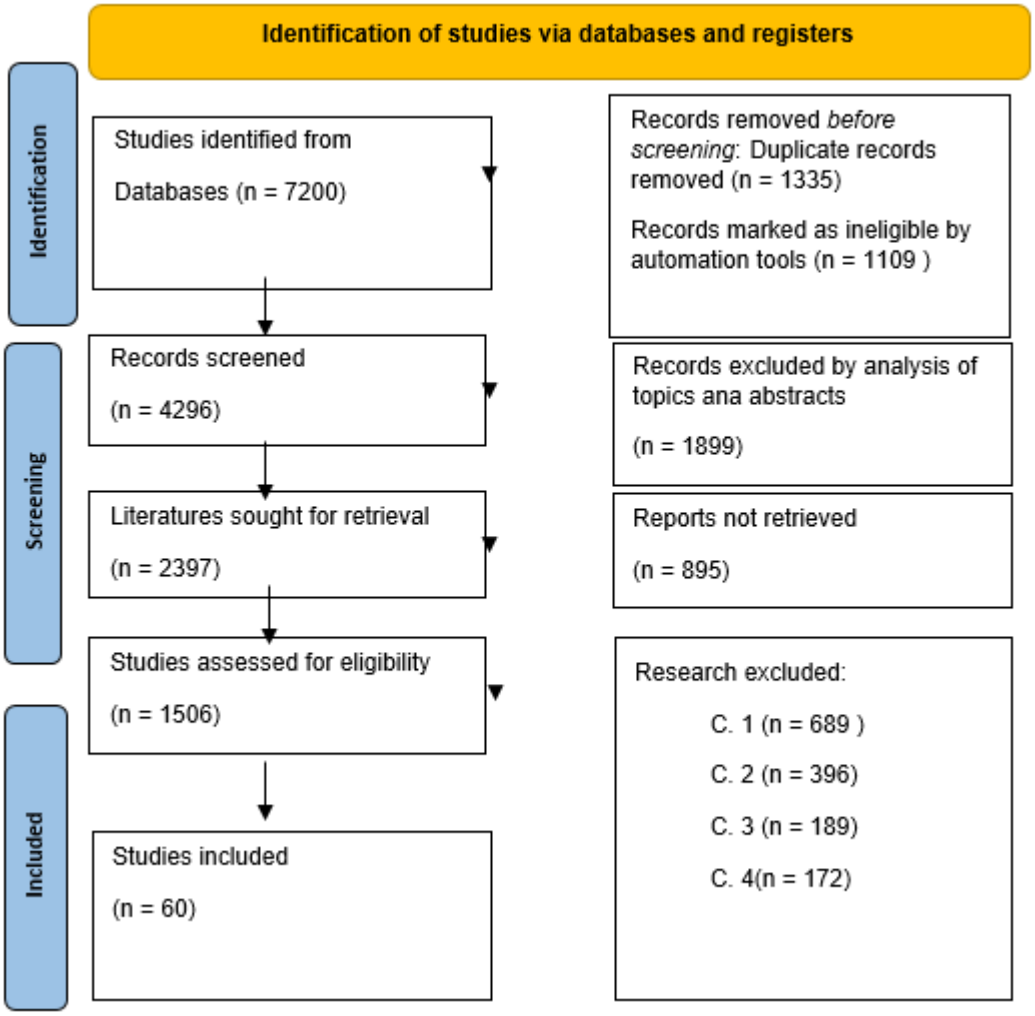

Figure 1. Data collection and screening in accordance with PRISMA

The process included several stages, starting with collecting and screening sources. Scopus and Google Scholar were selected for the collection stage, as these databases provide a vast repository of scientific articles on education and art. Keywords such as "art," "education," "digitalization," "cultural heritage," "preservation," and "technology" were used in these databases, alongside the selection of the review article type. The search was restricted to publications from 2020 to 2024, resulting in 7,200 initial entries. After excluding 1,335 duplicates, 1,569 records were identified as ineligible by automation tools. The screening stage then assessed 4,296 items, with a critical review of titles and abstracts leading to the rejection of an additional 2,397 items that did not align with the chosen topic. A total of 1506 items were received and subjected to the next stage of screening. It involved the inclusion of literature based on the following criteria:

1. Language of writing: English. If the study had valuable practical significance, it was included if it had an English-language abstract
2. Presence of research methodology
3. Characterization of the peculiarities of education in modern conditions or determination of the role of art
4. Identification of specific mechanisms for the preservation of cultural heritage

Thus, 52 materials related to education, art, and mechanisms for preserving cultural heritage were selected for data analysis.

Excel software was used to process the selected materials for data analysis. In particular, such data as author, field (education, art, cultural heritage preservation), results, and conclusions were transferred to the relevant tables. This made it possible to demonstrate the connections between education, art, and the preservation of cultural memory. Another table was also made in which such data as the author, mechanisms of cultural heritage preservation, and the result were entered. This made it possible to identify effective cultural heritage preservation practices and find connections between education and learning. The synthesis was used to combine the results obtained. A comparative analysis of the data obtained with the results of other authors was also used, which made it possible to confirm the information obtained.

Results

The Role of Art and Education in the System of Preservation of Cultural Heritage

Developing strategies for preserving cultural heritage and developing cultural environments through the involvement of educational institutions is becoming an essential element of government work. In addition, the further preservation of cultural heritage sites is society's responsibility, as such sites directly shape national identity

and transmit historical, folk, and cultural values to future generations. Researchers agree that an important and one of the most effective ways to achieve this task is to actively integrate art with educational processes, leading to a comprehensive approach to heritage preservation. Artistic processes and education create the necessary spaces that raise awareness of cultural heritage and allow for active interpretation of preserved objects (see Figure 2).

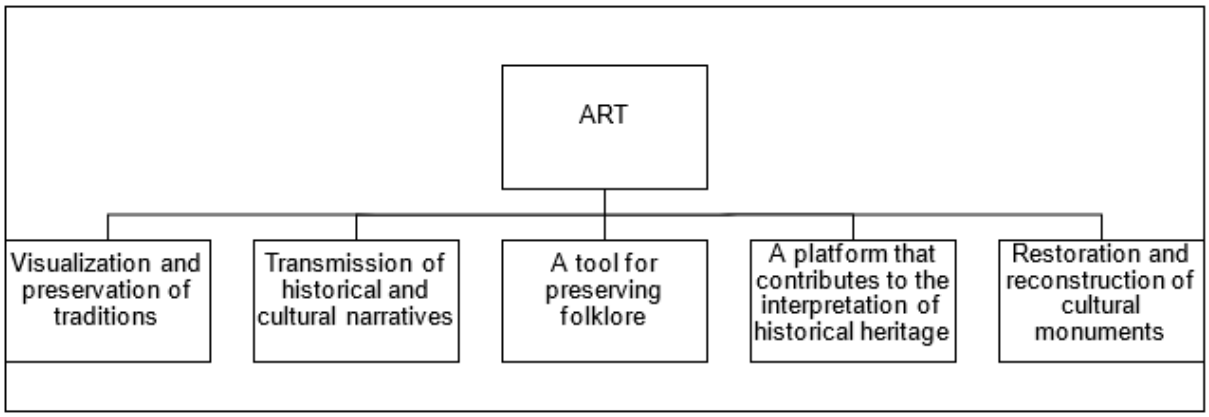

Figure 2. The role of art in the system of preservation of cultural heritage

In such a situation, as seen in Figure 2, artists have an essential tool - powerful visualization tools that facilitate public discussion about the importance of existing values and traditions and new trends in cultural development. In such circumstances, art brings the existing heritage up to date, transfers its elements to the modern context, and significantly promotes existing achievements among a broad audience. First and foremost, the use of art (including street art), art installations, sculptural research, and multimedia projects that can convey the spirit of the relevant era, convey emotions from the past, and rethink the role of existing artefacts (Piccone, 2024; Tazkiyah et al., 2024). Art also allows us to expand the boundaries of existing academic research, engaging a broad audience in discussing and understanding heritage. An important aspect worth considering is the possibility of interacting with cultural heritage through art, including working on contemporary artworks and finding inspiration or motivation from traditional crafts, folk, or contemporary cultural practices (Dias Pereira et al., 2021; Münster et al., 2024). This also includes working with historical examples of folk crafts and artistic samples of antiquity, adapting national motifs to contemporary artistic forms of fashion, and performing various interpretive actions to update knowledge about past practices (see Figure 2). In such circumstances, education is a vital tool for shaping various aspects of cultural consciousness, particularly in understanding the values of the existing heritage. Existing formal and non-formal education programs can have an appropriate cultural component, which

will help form updated public expectations for preserving existing monuments (Afanasieva, 2023). This approach can be implemented by including existing topics in the curriculum, the appropriate level of development of museum pedagogy, and the organization of interactive educational events that will promote and teach work with cultural heritage sites. Working with educational components also has the advantage of engaging younger students in a more detailed mastery of history, cultural history, theory, art history, etc. (Santos López & Torrente-Patiño, 2020). Such an approach would help form an interest in studying the relevant topics from a reasonably early age, which could develop into a relevant professional interest.

To improve the educational situation, existing cultural development institutions (art galleries, research institutes, museums) can be involved in the educational process not only as educational platforms but also as relevant stakeholders who impact the formation of autumn components in the curricula of educational institutions. In addition, cultural development institutions usually have important educational platforms that can provide interactive learning. First and foremost, we are talking about interactive exhibitions, special seminars, and workshops that allow for opportunities for practical work with preserved cultural artifacts, crafts, professional experience, etc. This approach contributes to a deeper understanding of the mechanisms of culture as a complex phenomenon in today's globalized world. The combination of artistic work and relevant training allows for an integrated approach to improve the cultural heritage preservation process further. In practice, such a combination can become a somewhat effective tool that considers the different appeals of artistic and pedagogical interaction (Pishchanska, 2024). For example, artists are well placed to create emotional connections between society and heritage, while educational processes can emphasize knowledge formation and understanding of its importance. This approach is based on interdisciplinary interaction at various levels between artists, educators, scientists, and cultural managers. An essential aspect of this approach is the use of digitalization, the application of modern technologies, including virtual reality tools, various online platforms, digital archives, etc., to promote culture for different age groups (Kleftodimos et al., 2023; Moula & Kouzoukakis, 2023). At the same time, it is also about establishing horizontal links between different social strata. In particular, the success of the cultural heritage preservation system in Anglo-Saxon countries (e.g., the United States) is based on factors of productive interaction between the private and public sectors. In the United States, there are currently more than 160 partner organizations that support government agencies in protecting cultural heritage sites, including a large number of American national parks that continue to operate thanks to well-established mechanisms of public-private partnerships.

Research and analysis of existing American practices in the sustainable preservation of cultural heritage can be a very effective model for organizing educational and artistic projects that will promote the preservation of cultural heritage (see Figure 3).

Figure 3. A model for synthesizing art and education to preserve cultural heritage

Interactive Platforms, Cultural Adaptation, and Cultural Heritage Preservation

Interactive platforms and digital resources must consider cultural differences to make learning more inclusive and promote the preservation of cultural heritage. As Kdyrova et al. (2024) noted, adapting educational materials to include relatable and understandable examples for students from different cultural backgrounds is essential. This approach enhances learner engagement while supporting the preservation and popularization of cultural heritage. Such a synthesis of education and the cultural and artistic sphere is particularly valuable in crisis periods (e.g., during conflicts and pandemics) when mobility may be restricted. For instance, history, literature, and art courses should ideally include topics and illustrations that reflect the cultural features, values, and traditions of various ethnic communities. This enables students to understand better the historical and cultural heritage of their own and other cultures, fostering a respectful attitude toward cultural heritage in a global context. Interactive platforms using VR/AR can provide access to such materials through virtual museums, digital archives, and online exhibition platforms that recreate cultural artifacts and rituals. Additionally, this approach encourages students to engage in cultural heritage preservation through interactive tools that allow them to study, understand, and appreciate cultural assets. Modern technologies, such as augmented reality, help to recreate experiences of interacting with artifacts, making cultural heritage preservation accessible to a broader audience.

At the same time, certain challenges are associated with ensuring the effectiveness of such a synthetic approach. In particular, we are talking about establishing an effective system for evaluating the selected strategies for preserving cultural heritage through the involvement of artists and educators. Obviously, this task requires separate processes based on different criteria. First of all, to take into account the effectiveness, we can resort to the analysis of existing quantitative indicators: determining the number of participants involved in attending relevant courses or educational programs, taking into account the level of attendance at organized cultural events, the total number of art projects developed and implemented. Quality indicators are equally important in a balanced assessment: different levels of audience understanding or interest and relevant indicators of cultural awareness.

However, the effectiveness of such strategies in many respects depends on the organization of long-term support, which can involve both state institutions and NGOs, legal entities, private companies, etc. Establishing cooperation at this level forms the basis for implementing large-scale projects in the future. Possible sources of funding include the use of financial resources from foreign institutions, grant support, etc. In fact, the evolution of international cooperation allows for increased visibility of organized events and the promotion of cultural heritage at the local and global levels. Raising private funds has had its impact, for example, on the European Union (Prados-Peña et al., 2023). In particular, the European Commission has been working on issues such as those of the European Parliament and the Council of Europe, which has resulted in the importance of developing urban culture. Cities were identified as the main objects for investment, ensuring high population employment. On the one hand, the emphasis in their development was on ensuring attractiveness and physical accessibility (infrastructure), but the historical and cultural heritage was proposed to be used as a basis for strategic planning of further development and regeneration of cities. This policy was aimed at using historical and cultural heritage, which has close links with the relevant infrastructure facilities and contributed to the growth of the attractiveness of living in the city for citizens, employees, business representatives, and tourists. This has led to a further evolution of citizens' sense of pride in belonging to separate urban communities, which has directly influenced the formation of appropriate levels of citizens' self-awareness. The cultural environment of cities (including restoration, repair, and renovation processes) has significantly influenced transformations in their perception and contributed to the promotion of a new quality of urban life. At the same time, cultural heritage preservation strategies have certain difficulties, which can be summarized in several universal statements (see Table 1)

Table 1. Difficulties in implementing the strategy of preserving cultural heritage through art and education

Problem	Description
Financial difficulties	One of the key problems is the lack of funding for existing projects related to the preservation of cultural heritage. Involving artists and using educational opportunities are costly processes that require investment. First of all, it is worth highlighting the high cost of restoration work, organization of the educational process, etc. In addition, cultural initiatives are not a priority in terms of state funding, so the risk of lack of funding is increasing.
Lack of coordination efforts	The use of an integrated approach requires well-established cooperation between representatives of the artistic, educational, scientific, and governmental sectors. Scientific, private, and governmental sectors. Inconsistencies and lack of approved plans lead to ineffective communication, which is not conducive to coordinated work.
Availability of specialists of the appropriate level	The process of preserving cultural heritage sites requires the services of highly qualified specialists, including those in art, archaeology, restoration, cultural history, etc. The lack of relevant professionals can reduce the quality of existing cultural heritage preservation programs.

Taking these challenges into account will help improve the planning position and develop appropriate strategies. The involvement of educators and artists in the protection of cultural heritage requires consideration of possible challenges to optimize further work and increase overall effectiveness.

Discussion

Given the purpose of this study, namely, to explore the main strategies for preserving cultural heritage through art and education and assess their effectiveness in supporting national identity, several preliminary hypotheses were confirmed. In particular, the first hypothesis assumed the existence of a direct link between art and education in the field of cultural heritage preservation. This connection should be based on the use of effective mechanisms of interaction. Accordingly, the results show that artists have a significant tool - powerful visualization tools that promote public discussion about the importance of existing values and traditions. It is also determined that art contributes to the actualization of the existing heritage and transfers its elements to the modern context, thus promoting existing achievements among a wide

audience. These results are confirmed in several scientific papers describing the relationship between art and cultural heritage. This study correlates with Pei's (2024) study, which identifies the impact of modern technology on the preservation of cultural heritage. Although this study does not explicitly characterize the importance of technology for this process, the impact of digitalization is mentioned in passing.

However, broader studies demonstrate a closer connection between artistic development, digital technologies, and cultural heritage preservation (Paulauskas et al., 2023; Sovhura et al., 2023; Wang et al., 2024; Wang et al., 2023). The next hypothesis was to prove that combining artistic work and education formulates a comprehensive approach to working with the cultural sector. Thus, the results prove the importance of the synthesis of art and education for the formation of close interaction with the cultural sector. This process combines two important aspects - creativity and learning - to realize a common goal: a deeper understanding of cultural heritage preservation. These results have been confirmed in a number of contemporary works. (Lucas-Palacios et al., 2023; Kleftodimos et al., 2023; He & Sornyai, 2023). In particular, Lucas-Palacios et al., 2023) analyzed the main concepts regarding teacher training from different Spanish universities in heritage education. This study is also supported by the findings of (Mudle & Cocciolo, 2024), who argue that due to the current proliferation of learning opportunities available in the field of digital preservation, it is important to trace the role of educational traditions for the cultural enrichment of students. This study also indicated that there is an ongoing need to provide education focusing on the essential elements of digital preservation. These opinions also correlate with the results of other scholars who have identified the role of innovative approaches based on the use of reality technologies in the training of cultural and artistic professionals (Ontiveros Llorens, 2024; Poutiainen & Krzywacki, 2023).

The results of the study are also supported by data from other works that show that the synthesis of art and education affects the active involvement of participants in the process of preserving cultural heritage through various projects, virtual exhibitions, interactive workshops, and innovative educational programs (Radomska & Ponkalo, 2023; Proskurina & Nikitina, 2023; Yurko & Riabtsev, 2024). The current scientific literature also proves that the synthesis of digital technologies in the process of cultural heritage preservation significantly expands access to cultural materials (Kosciejew, 2023; Skublewska-Paszkowska et al., 2022). In addition, these technologies also contribute to making this process more interactive. Using multimedia resources, innovative technologies, augmented reality, online museums and virtual exhibitions help combine education and art into one (Sofilkanych, 2022; Türkmen & Savasta, 2024). This, in turn, makes them more accessible to the audience. The last hypothesis

assumed that the establishment of an effective system for evaluating cultural heritage preservation strategies is based on a systematic, flexible approach. Accordingly, the results show that this flexible approach involves a balance of quantitative and qualitative indicators and local characteristics of local cultural development. However, as shown in the results, this approach may face a number of important challenges. In particular, limited access to technology is an important issue. Despite the fact that modern technologies can significantly increase the efficiency of heritage preservation, access to these technologies remains limited in many regions. Current research also highlights other challenges that should be taken into account. In particular, the challenges of cultural globalization and the difficulty of evaluating effectiveness are notable (Wang et al., 2024; Wang et al., 2023; Vlase & Lähdesmäki, 2023). It is worth noting that, in general, evaluating the effectiveness of cultural heritage preservation through arts and education is a complex process.

In addition to taking into account quantitative indicators, it is also important to consider various qualitative criteria, such as the transformation of the level of awareness or the formation of cultural consciousness. Naturally, these qualitative indicators are difficult to measure. In general, this makes it difficult to assess and determine the overall success of the strategy. The methodology proposed in the study has certain limitations associated with using the PRISMA research approach in the article. In particular, the range of dates used to filter out less relevant works was outlined. On the one hand, selected scientific works are based on other scientists' already published research results. At the same time, the use of a clear range of dates still creates the possibility that certain important publications with a still relevant vision for the development of cultural heritage preservation strategies, including through the combination of the capabilities of artists and educators, are outside the scope of research attention. Also, primarily English-language publications in peer-reviewed publications were selected for analysis, which leaves the possibility that some non-English-language articles, which are also devoted to the proposed issue, were outside the scope of research attention. However, such methodological limitations appear more as directions for further research. Thus, future research will focus on the use of multilingual relevant sources. In addition, it is also worth conducting an empirical study among museum staff, archivists, and art galleries to understand the potential of the above strategies for preserving cultural heritage.

Conclusions

It is important to involve relevant government agencies, NGOs, and private business representatives in the development of cultural heritage preservation

strategies. One of the most important ways to achieve this is to use the possibilities of integrating art and education, which will be the key to using an integrated approach to preserving cultural heritage. In such a strategy, artists can use a powerful visualization tool to raise interest in heritage and promote the achievements of the past to a wider audience. Art opens up opportunities for expanding academic research and allows for interaction with cultural heritage. Educational components are turning into key elements in the formation of value orientations. The focus on engaging the learning potential will interest young students in more active study of history, art history, cultural studies, and other disciplines, which may also affect the appreciation of cultural heritage in general. Cultural development institutions also have access to educational platforms that promote interactive learning. The application of an integrated approach will allow artists to affirm the emotional connections between cultural heritage and society in the field of society and heritage, while educational processes can emphasize the formation of knowledge and understanding of its importance. This approach is based on interdisciplinary interaction with the implementation of educational programs and cooperation between artists, educators, scientists, and managers in the field of culture and education. In this regard, the experience of the United States and the EU countries is useful, where cultural mainstreaming takes place through additional mechanisms of cooperation between the public, business, and government agencies; cultural heritage is at the heart of infrastructure planning, promotion of the cultural glory of cities, etc. At the same time, the application of cultural heritage preservation strategies requires flexibility in overcoming existing challenges: financial difficulties, lack of organized efforts, and lack of specialists of the appropriate level (lack of organizational process). Evaluating the effectiveness of strategies for preserving cultural heritage through the interaction of education and art requires flexibility in combining quantitative and qualitative indicators. Proper evaluation is possible in each specific case of implementing a cultural heritage preservation strategy that would take into account local peculiarities and the degree of involvement of artists and educators in the work.

Ethical Considerations

This study was conducted in accordance with ethical standards. Prior to data collection, informed consent was obtained from all participants, to ensure their voluntary participation. The confidentiality and anonymity of all respondents were strictly maintained throughout the research to protect their privacy and well-being.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Urbanization of Ukrainian Culture in the Context of Globalization: Trends and Challenges

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Abstract

The study aims to characterize the main trends in the urbanization of Ukrainian culture within the context of contemporary globalization transformations. The PRISMA methodological approach was employed to collect literature and research materials, involving a rigorous selection of academic sources through a screening process. Strict criteria were applied for the inclusion of sources relating to content, methodology, language, and time of publication. A total of 60 academic sources were selected. The results present the vital historical milestones of Ukrainian cultural urbanization, identify the impact of globalization on the contemporary process of urbanization in Ukrainian culture, and describe the influence of the war on these processes. It is noted that, as of 2024, 2,093 cultural sites have been damaged or destroyed due to Russian aggression. The conclusions summarize that urban culture in Ukraine has key features of evolution: multiculturalism, the presence of the Ukrainian element, prolonged Russification, and architectural and artistic development.

Keywords: *Globalization, Historical Periods, Modernity, Ukrainian Culture, Urbanization, War.*

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Introduction

Urbanization and globalization are two powerful forces driving the transformation of modern cultural spaces. Current urbanization processes triggered by migration have led to significant changes in cultural identity, traditions, and lifestyles. These processes are global and have also impacted Ukrainian culture. Accordingly, studying the influence of globalization on Ukraine's ongoing urbanization processes is an essential and relevant task. Contemporary researchers have noted the ambiguous nature of globalization (Posokhov, 2022; Zastavetska et al., 2019).

On one hand, it stimulates the development of new forms of cultural expression and provides access to modern technologies. From this perspective, cities become essential hubs of innovation and cultural exchange, where new art, music, and literature genres evolve (Yanchuk, 2024). Contemporary studies specifically address complex issues such as the development of globalization, strategies for ensuring sustainable development, the interaction between modernity and traditionalism, and the consequences of the rise of the network society (Danilyan et al., 2022; Mazurkevych et al., 2024; Yu et al., 2024).

The growing interest in urban studies is one of the notable trends in contemporary academic discourse. However, this process is characterized by various challenges. The main challenge for Ukrainian culture lies in finding a balance between preserving its identity and adapting to a globalized world. A current analysis of the Sustainable Development Goals for Ukrainian cities is presented in the research by Blinova and Rodyk (2024). The specificities of Ukrainian cultural development within the context of contemporary globalization paradigms are explored in the work of Pylypiv and Oliinyk (2024).

Modern trends threaten the loss of authentic elements of national culture. In current globalization processes, cities also become hotbeds of problems that endanger society's ability to survive. These issues encompass a wide range of concerns, requiring the expertise of many specialists to resolve. Consequently, as noted in numerous studies, the further effective development of cities requires formulating cultural policy strategies that support the growth of national culture while integrating into the global cultural space (Habrel et al., 2024; Pylypiv & Oliinyk, 2024). Unsurprisingly, academic interest in cities is growing, and urban studies have become a prominent interdisciplinary research field over the past three decades.

Globalization, sacralization, and urbanization are actively shaping various countries. According to recent studies, urbanization (Fr. urbanization or Lat. Urbanus – urban) refers to the complex process of concentrating populations in large cities. A

vital feature of this process is the growing contrast between urban and rural areas. Meanwhile, urbanism (Fr. urbanisme) is a theory based on the concentration of material and spiritual culture in cities and the further development of urban environments. In modern society, the application of the concept of "urbanization" within the framework of "society's globalization" has become quite relevant (Joshi, 2024; Lindner & Meissner, 2018). According to recent studies, the term "globalization" entered the contemporary scientific lexicon to interpret the main transformations and changes occurring in various spheres of social activity (Majhanovich & Zajda, 2024; Ray & Ojha, 2024). Consequently, in contemporary studies, globalization is understood as a complex, civilisation-wide process of synthesis and unification across different spheres of human activity (Marukhovska-Kartunova et al., 2024; Wu et al., 2023; Zajda & Whitehouse, 2024). This process can encompass various areas, including culture, politics, production, economy, finance, trade, and more (Alieksieienko et al., 2024; AlShawaaf & Lee, 2024; Zhang, 2024). This way, globalization is a macro-trend of contemporary global development (Feng, 2023). As a result of globalization trends, culture becomes more interconnected, and there is active convergence and merging of various national cultures. At the same time, contemporary studies emphasize that urbanization processes in the context of globalization are characterized by systematized coverage of all spheres and subjectivity (Rimkus, 2024; Scrase et al., 2015). Accordingly, academic literature presents different viewpoints on the impact of these processes on culture (Shen, 2024; Shukla, 2024; Tevdovski, 2024).

Key Theoretical Perspectives on Urbanization and Cultural Identity in Ukraine and Beyond

The work of Stefanidou et al. (2024) identifies culture as a driver of sustainable urban development. Ilchenko's (2020) research describes the role of global processes in the homogenization of urban cultural space. This study also addresses how globalization affects the identification and representation of the past in contemporary Central and Eastern European cities. Himka (2015) noted that the diverse historical experiences of modern Ukrainian regions have influenced the formation of unique political cultures and identities. Zastavetska et al. (2019) described the critical milestones in the development of urbanization in Ukraine, characterizing the main factors that influenced the formation and growth of cities. In their research, the authors identified the key factors that shaped cities in different historical periods. The conceptual foundations of the development and formation of Soviet cities are detailed in the research by Tsymbaliuk (2019). Certain milestones of Ukrainian intercultural bridges are presented in the study by Cherkes et al. (2021). Crawford's (2017) work describes the main stages in establishing the socialist culture and highlights its primary

feature—standardization. Ivashko et al. (2024) described the distinctive features of the "provincial secession" style in Ukraine at the beginning of the 20th century. These authors also characterized the main issues related to preserving monuments of this style during wartime (Ivashko et al., 2024). Saleh Alalawi and Elghonaimy (2024) described the role of certain social aspects in the development of urbanization. Zhou et al. (2022) characterized the potential and possibilities of post-industrial buildings for the contemporary development of Ukrainian cities. Their case study focuses on a thematic analysis of buildings in Lviv. Visual symbols that contribute to the identification of modern cities are analyzed in the work of Linda and Mychajłyszyn (2017).

Socio-cultural Transformations and Urban Challenges in Contemporary Ukraine

Socio-cultural transformations in modern Ukraine are characterized by the work of Skvorets and Kudinov (2021). The issue of identities in modern regional development is raised in the research by Melnychuk and Gnatiuk (2018). The historical foundations of multimobility in Ukrainian cities are presented in the study by Tsypko et al. (2024). Changes in Ukraine's cultural space during the current Russo-Ukrainian war are described in the work of Slyvka et al. (2017). Artemenko et al. (2024) examine the impact of the war on contemporary globalization processes.

At the same time, other challenges faced by small cities in modern Ukraine are described in the work of Dmytrenko et al. (2019). Gnatiuk (2018) emphasized the importance of renaming streets in Ukraine after the Revolution of Dignity. The research explores trends in the reconstructive activity of certain phases of the urban life cycle based on the study of contemporary Ukrainian cities (Pleshkanovska et al., 2024). The spread of active globalization in Ukrainian cities and the decline of rural areas are evidenced in the research by Plotnikova (2015), which justifies specific development strategies for Ukrainian villages. According to Posokhov (2022), the history of cities as a phenomenon of human civilization dates back thousands of years, but in his view, cities now fulfill a special function by embodying modernity.

Contemporary scholars attempting to find a general trend in urbanism have identified a noticeable growing interest in urban culture as one of the key directions. In particular, as evident from this review, more and more scholars in recent years have written in detail about controversial cultural aspects, cultural symbols, and urban identity. Although such problems are complex and multifaceted, there is still a lack of comprehensive studies that describe the main milestones of urbanization in Ukraine and its further challenges, considering current events. This research aims to address this task. Overall, this work will focus on a comprehensive analysis of the impact of

globalization on urban processes by involving a wide range of academic literature and methods of inquiry.

However, discussions of urban studies encompass much more than just urban problems. Accordingly, this research will focus on several key research questions. In particular, this work will analyze the historical milestones of urbanization processes in Ukraine, the current state of Ukrainian cities, and the key challenges that have arisen as a result of the war.

The study aims to describe the urbanization trends in Ukrainian culture, considering its historical development, the impact of globalization, and the challenges associated with the war, to provide a comprehensive understanding of the phenomenon of cultural transformation.

Methodology

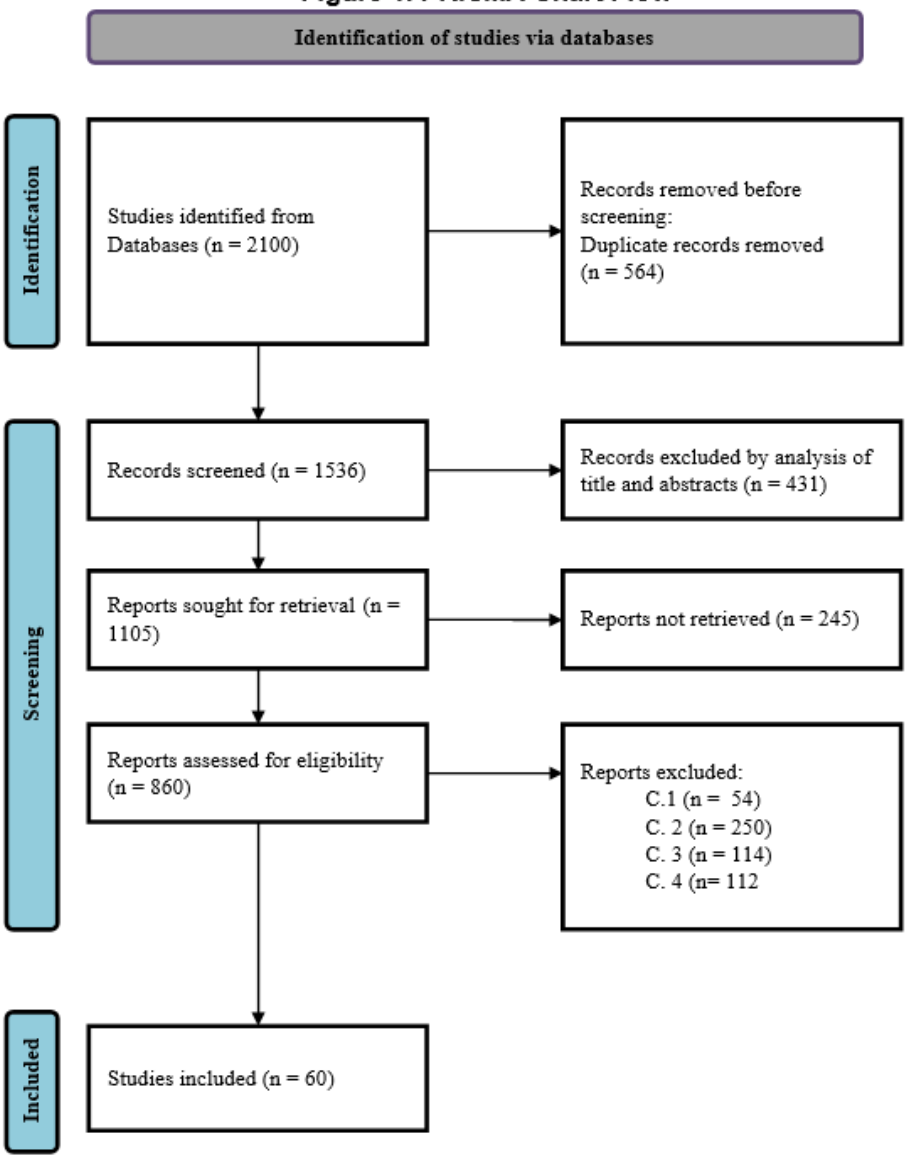
This study falls within the category of explanatory quantitative research, aiming to accurately and systematically describe the urbanization of Ukrainian culture in the context of globalization changes. The study's descriptive nature also addresses questions such as: What is urbanization, and when and why does it emerge in Ukraine? The research's explanatory design necessitates applying various research methods, including systematic analysis of scientific sources and the comparative method.

The inclusion of diverse types of sources determined data collection for this explanatory study. The sample was formed by engaging a variety of academic literature, including monographs, chapters from collective monographs, scientific articles, conference materials, and more. All these sources were screened and analyzed before inclusion. The date range for literature selection spanned from 2014 to 2024 to ensure the inclusion of relevant research information from the past ten years.

The procedure for including literature and academic sources in this explanatory study followed the PRISMA approach. Specifically, academic databases were selected, including Scopus, Web of Science, and Google Scholar. Keywords such as "globalization," "Ukraine," "urbanization," "cities," and "war" were entered into the databases, yielding a total of 2,100 results. Subsequently, all duplicates were removed (-564 works). Based on the analysis of titles and abstracts, studies unrelated to the chosen research topic were excluded (431). See Figure 1. The next screening phase was conducted to identify and mark studies that did not fit the research theme as "ineligible." Studies by Russian and Belarusian scholars were also marked as "ineligible." The following inclusion criteria were then applied to the selected works:

1. Content: The study must characterize contemporary urbanization or globalization processes in the world or Ukraine.
2. Language of publication: Only English-language works were included in the study.
3. Peer-reviewed journals: Only studies published in peer-reviewed journals were included in the sample.
4. Date range: The selected studies were published between 2014 and 2024. (See Figure 1).

Figure 1. PRISMA Chart Flow



By applying the predefined criteria and using the PRISMA methodological toolkit, 60 sources were selected.

The data analysis was conducted in several stages. Initially, to carry out this descriptive study, it was necessary to identify the general trends regarding urbanization or globalization in academic studies. To achieve this, relevant tables were created using Microsoft Excel. Specifically, the first table included columns such as author, year of publication, characterization of urbanization or globalization processes in the context of culture, author's perspective, and conclusions. These data were then synthesized and analyzed to determine the critical characteristics of these processes.

The second table addressed components such as author, year of publication, development of Ukrainian cities, development of Ukrainian culture, the impact of globalization on Ukraine, and conclusions. This allowed for the systematization of data relevant to Ukrainian realities. Subsequently, a comparative analysis method was employed, enabling the comparison of the collected data with information found in other academic studies.

Results

Stages of Urbanization in Ukrainian Culture

The first cities on the territory of modern Ukraine began to form in the 4th–3rd millennium BCE, alongside the emergence and spread of the Trypillian culture. Proto-urban centers – settlements covering an area of approximately 100–340 hectares – have been discovered through archaeological excavations in Trypillia, Vesely Kut, Maidanetske, Myropillia, Volodymyrivka, Bily Kamin, and other locations. Unique artifacts, pottery, samples of proto-writing, and remains of advanced structures indicate the population's high material and spiritual culture at that time. However, in the academic world, the Trypillian culture is considered a proto-civilization that did not evolve into a fully-fledged civilization due to the absence of administrative structures, a distinct writing system, governance institutions, etc. Its legacy did not continue into subsequent periods, as urban life ceased for a long time. Significant urban centers emerged as Greek city-colonies, which became a source of ancient traditions in Ukrainian culture: Tyra, Chersonesus, Olbia, and Panticapaeum (Zastavetska et al., 2019). Active trade with the metropolis spurred economic growth, notably influencing pottery production, building techniques, and urban planning (Greek cities were planned). Cultural life also thrived – archaeological remains suggest the spread of religious beliefs, sculptures, and theatrical performances. Particular attention should be given to "Scythian gold", the treasures of which became a subject of dispute between Russian authorities and Ukraine during the annexation of Crimea. Greek cities also influenced Ukrainian urban culture during the Byzantine period (as

a border zone between Rus and Byzantium); however, overall, the ancient legacy and its influence, especially the multiculturalism characteristic of Greek cities, had only a peripheral significance for the development of Ukrainian culture (Zastavetska et al., 2019).

Urbanization and cities became the foundation of cultural development during the medieval period. The history of Ukraine-Rus is intertwined with the development of "grads," urban centers of individual tribes that later evolved into the centers of separate principalities. Urbanization led to population growth, the development of artisanal production, and the emergence of new architectural forms, including stone constructions of churches and temple buildings and defensive structures made of wood and stone and princely residences.

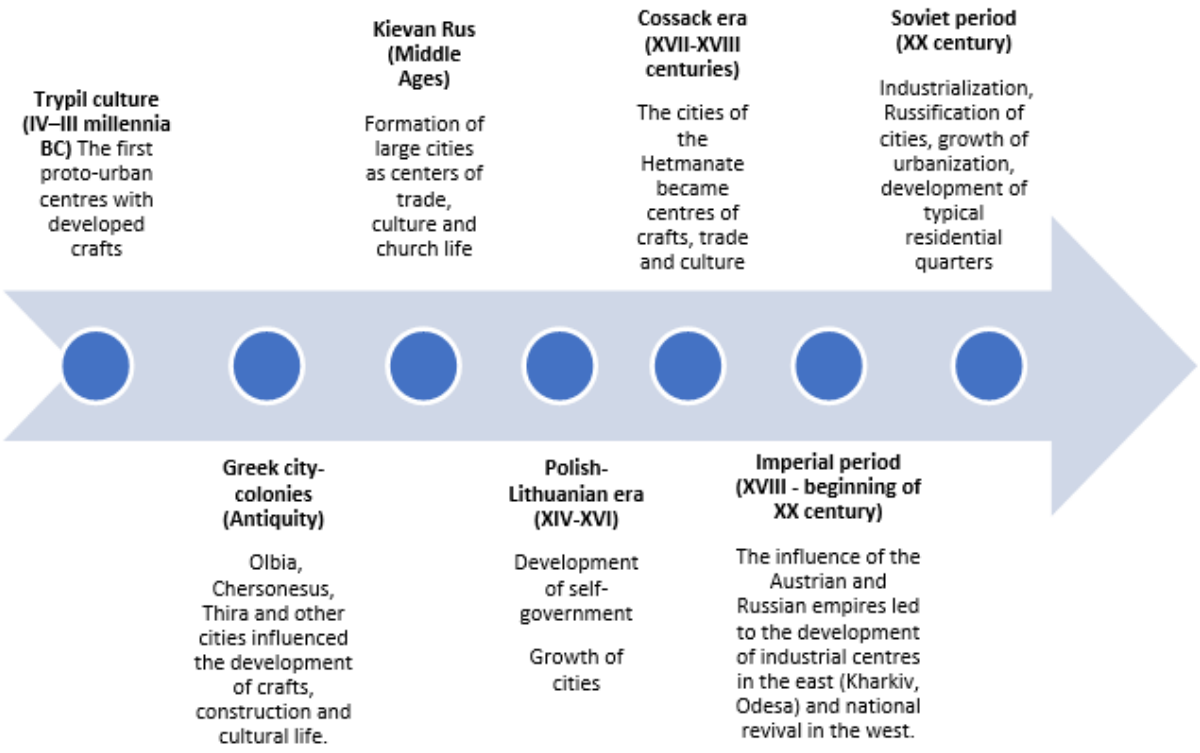
Urban life fostered the emergence of new rituals, administrative development, and participation in decision-making (via the institution of the "veche"). Kyiv, Chernihiv, Peremyshl, Volodymyr, Lutsk, Pereiaslav, Terebovlia, and other cities became centers of church life, where schools (mainly private ones for elite children) were established, chronicles were written, and suburban areas were actively developed. Unfortunately, unlike European countries, the cities of Rus have left almost no secular literary tradition. Thus, despite the development of literacy, little is known about the secular literature of the towns. At the same time, through international trade, the cities of Rus were relatively multicultural (Parshyn & Mereniuk, 2022). This is particularly evident in the case of medieval Lviv, which became a central hub of trade relations with a multinational population during this period (Mereniuk & Parshyn, 2024). However, Ukrainian cities did not have many urban residents for a long time, mainly due to the threat of military invasions.

The establishment of Polish rule over Ukrainian lands, the power of Lithuanian princes, and the formation of the Polish-Lithuanian Commonwealth led to the spread of Magdeburg law (self-government) in the cities, aligning them with European realities of the 14th–16th centuries. Urban development accelerated, and the network of towns expanded as the gradual colonization of Ukrainian Podillia, Bratslavshchyna, southern Kyiv region, Cherkasy, and other areas took place. At the same time, the focus on Catholicism led to the Ukrainian Orthodox community becoming a minority. This resulted in resistance led by brotherhoods – urban organizations that cared for people experiencing poverty and promoted Ukrainian education, Orthodox religious life, and book printing. Cities became centers of education, as Jesuit colleges and private schools in even small towns fostered cultural life (Zastavetska et al., 2019). The secular literary tradition documented urban history and everyday life. European

urban planning traditions led to the construction of stone (brick) town halls and market squares surrounded by stone buildings in nearly all cities (See Figure 2).

The urban culture of the Hetmanate era (17th–18th centuries) was a unique phenomenon, shaped by local religious traditions, the Cossack military system, trade, population migration, and cultural interaction with other nations and states. During the Cossack rule, cities (especially Kyiv, Vinnytsia, Chernihiv, and Pereiaslav) enjoyed a degree of political autonomy, and urban life was closely intertwined with the Cossack order, with the Cossack elite influencing the distinctiveness of the cities. Artisanal crafts (such as blacksmithing, pottery, weaving, iron, and wood processing) developed rapidly, and city fairs promoted cultural exchange—elements of European styles, Ukrainian Baroque, and local architectural traditions coexisted in architecture. Monasteries served as religious centers, where books were printed, and icons were created. The first higher education institutions were established, including the Kyiv-Mohyla Academy. Urban elites encouraged the development of music, literature, and theatrical art (such as the emergence of "oversteps"). Armenian, Jewish, and Greek communities also contributed to the development of urban crafts and trade (See Figure 2).

Figure 2. The Main Historical Stages of Urbanization in Ukrainian Culture



Ukrainian lands were incorporated into the Austrian and Russian Empires during the second half of the 18th century and the early 20th century, leading to

divergent urban cultural development. Under Russian rule, municipal governance was reorganized along Russian lines, causing cities to lose their self-government and come under centralized control. Cities such as Kharkiv, Kyiv, Odesa, and Katerynoslav (modern-day Dnipro) evolved into major industrial centers. The development of railway transport (since the 1860s) transformed Ukrainian cities into transport hubs. Workers (often brought from Russian territories) became a significant social stratum (Zastavetska et al., 2019). The Russification of intellectual life resulted in cities becoming predominantly Russian-speaking while the rural population remained Ukrainian-speaking. Monumental buildings such as universities, theatres, administrative buildings, and libraries were erected in the larger cities. Under Austrian rule, urban development also progressed. Although the Austrian authorities did not prohibit the Ukrainian language, cities were dominated by Polish and German ethnic groups. At the same time, urban culture experienced a national revival based on specific traditions of self-government, political life (the formation of the first Ukrainian political parties), and cultural development (literary, theatrical, civic, etc.). Although western Ukrainian cities did not become significant industrial centers, they also developed as hubs of production and labor due to the expansion of the railway network.

The collapse of the empires and the formation of the Soviet Union profoundly impacted urbanization and the cultural life of cities. Industrialization accelerated urbanization rates, with an influx of workers leading to significant Russification, and cities' lifestyles and appearance changed (Tsymbaliuk, 2019). The emergence of factories and plants transformed cities into industrial agglomerations. In the post-war years, extensive reconstruction of war-damaged cities modernized infrastructure. Cities grew through the construction of new standardized residential quarters. Typical schools, hospitals, and kindergartens were also built (Tsymbaliuk, 2019). Urban planning was generally based on functionalist principles, leading to simple, rational architectural forms. Urban culture took on both formal and informal expressions. At the center of formal cultural life was the Soviet paradigm of socio-political development promoted through cultural centers. Cinema, theatre, new schools, vocational colleges, and universities became important educational and scientific institutions. Soviet modernism became the dominant style in urban art and architecture (Skvorets & Kudinov, 2021). Even after the collapse of the USSR, certain cultural development paradigms continued into the early years of independent Ukraine.

The Impact of Globalization on Ukrainian Urban Culture: The Russian-Ukrainian War and Urban Cultural Life

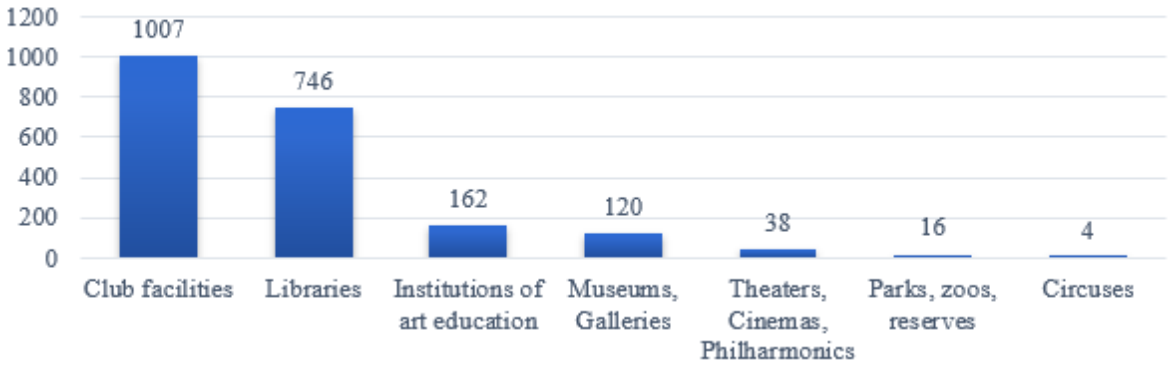
In the current stage of cultural development, globalization plays a crucial role. This process fosters the search for new ideas, the exchange of creative concepts, the integration of specific values, and the active circulation of cultural products between individual countries and across continents. In such circumstances, Ukrainian urban culture has been transformed, incorporating contemporary trends in popular music, cinema, and literary festivals and events (Habrel et al., 2024). As a result, Ukrainian artists can showcase their works on international platforms. Cross-cultural projects have also been developed, introducing Ukrainian culture in interaction with other global cultures. Urbanization has contributed to the creation of new forms of art in cities. This growth includes the emergence of new buildings (in contemporary European and American styles), new art spaces, educational institutions for children, galleries, museums, and venues for festivals. Urbanism, characterized by a fast-paced lifestyle and eclecticism in style, has shaped modern artistic forms: performances, installations, and graffiti art, among others. It is important to note that the digital evolution of communication tools has significantly deepened the globalization and urbanization processes. This development influences all aspects of public life, including the dissemination and perception of cultural heritage. Social media, streaming platforms, and other technological innovations offer new opportunities for artistic interaction at various levels and stages (Habrel et al., 2024). On the one hand, this process has elements of democratization, while on the other, it expands the audience for Ukrainian artists.

At the same time, globalization has also created specific challenges. On the one hand, the influx of people into significant cities (Kyiv, Lviv, Odesa) poses risks to the social life of small towns and rural areas. Another challenge is preserving Ukrainian identity amid the globalization of cultural processes. For a long time, the danger to Ukrainian urban culture was Russification, as well-funded meetings, conferences, seminars, concerts, exhibitions, etc., carried a distinct Russification agenda. On the other hand, the intensive urbanization processes, despite Western influences, have also heightened interest in traditions, folklore, and national heritage, which have counterbalanced cultural homogenization. Urban art has begun experimenting with national symbols and various aspects of Ukrainian identity (Pylypiv & Oliinyk, 2024). European integration has played a role in the development of urban culture. According to the decisions of the Council of Europe, cities and urban landmarks have a special status, and infrastructure development must align with the historical urban

environment. Installations, cultural objects, and ethnic exhibitions fit the broader European motto, "Unity in Diversity!"

Russian aggression against Ukraine, which began in 2014 and escalated in February 2022, has had a profound impact on all aspects of Ukrainian society, including the cultural development of cities. Several cities have fallen under occupation, many urban centers have suffered significant destruction, and some have been entirely obliterated by Russian airstrikes (Orlova et al., 2024; Rodinova et al., 2024). Large-scale internal and external migrations have affected urban demographics, affecting everyday life. Significant blows have been dealt to infrastructure, with museums, libraries, universities, theatres, galleries, and other cultural sites being damaged or destroyed, creating a cultural vacuum. As of September 2024, 2,093 cultural institutions have been affected, not including heritage sites (see Figure 3). The most numerous damaged cultural institutions comprise club establishments (48.2%).

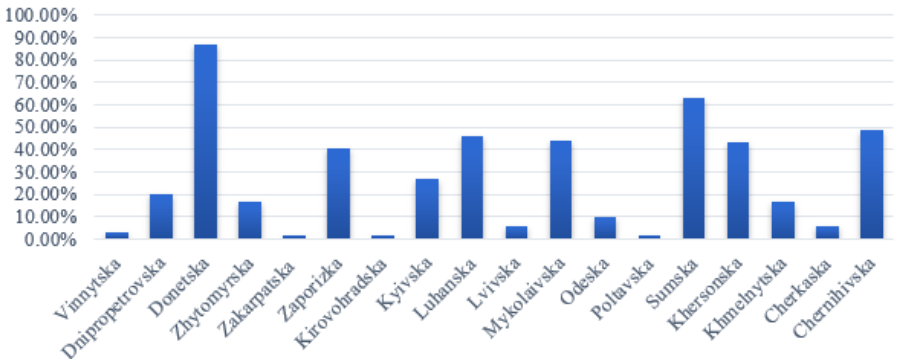
Figure 3. Number of Cultural Institutions in Ukraine (as of September 2024)



Source: Ministry of Culture and Strategic Communications of Ukraine (2024).

The most affected cultural institutions are located in the Donetsk, Kherson, Kharkiv, and Kyiv regions, as well as in the city of Kyiv, Luhansk, Mykolaiv, and Zaporizhzhia regions (see Figure 4).

Figure 4. Percentage of Damaged Cultural Institutions in Ukraine (by Regions)



Source: Ministry of Culture and Strategic Communications of Ukraine (2024).

On the other hand, the war has heightened the sense of justice, leading to new forms of solidarity. Artists, individually or collectively, support cultural initiatives and organize charitable events to preserve the national heritage. Thus, while Russian military aggression has caused severe physical destruction, it has also strengthened among Ukrainians (including artists) an understanding of the importance of cultural self-awareness, which is a critical component in the formation of national values.

A crucial aspect of the present moment is the potential to consider the post-conflict period, which will become an essential phase in restoring Ukrainian cultural life. The rebuilding of cities will foster cultural transformations, providing opportunities to adopt new, less conventional architectural forms and to combine traditional and modern elements.

Physical reconstruction will also involve the creation of new cultural spaces that will meet the needs of a digitized society, incorporating Ukrainian ethnic styles and more. International cooperation can be seen as a significant tool for realizing such initiatives, as establishing the necessary contacts with foreign cultural institutions will attract the required financial resources and implement specific cultural projects with world-class professionals. (The war has also left its mark on European consciousness; notably, the famous Banksy added his graffiti to support the Ukrainian people.) However, infrastructural damage and the loss of many cultural heritage sites remain pressing issues. Additionally, there is a need to help Ukrainian refugees who have found themselves detached from their cultural environment. Support from both Ukrainian and international institutions is necessary to enable them either to return home or to integrate into new urban life abroad.

Discussion

Given the study's overarching aim, namely the analysis of the urbanization of Ukrainian culture in the context of contemporary globalization trends, it has been determined that the development of Ukrainian culture at this stage faces several challenges. Specifically, the first task involved analyzing the historical periods of urbanization within Ukrainian culture. Accordingly, the research results indicate that the primary stages of urbanization include the periods of the Trypillia culture (IV–III millennium BCE), Antiquity (development of Greek proto-cities), Kyivan Rus, where the formation of large cities (Kyiv, Chernihiv, Pereiaslav) as centers of trade, culture, and pastoral life occurred, the Polish-Lithuanian period (XIV–XVI centuries), which influenced the emergence of self-governance and the growth in the number of cities, the Cossack period (XVII–XVIII centuries), during which the cities of the Hetmanate became centers of crafts, trade, and culture, blending European styles with local

traditions, the Imperial period (XVIII–early XX century), characterized by the influence of the Austrian and Russian empires, and the Soviet period (XX century), notable for industrialization, Russification of cities, increased urbanization, and the development of typical residential districts and modernist architecture. These findings correlate with the study by Zastavetska et al. (2019), which identifies similar stages in the urbanization process of Ukraine, including the emergence of Greek colonies, the establishment of ancient Rus cities, the strengthening of urban development under the influence of factory production, the development of cities influenced by industrialization, and the contemporary period of urban settlement development. The results also highlight that Ukrainian cities within the empires experienced significant impacts from introducing urbanization trends. In Russian contexts, cities transformed into industrial centers and experienced Russification, whereas citizens had opportunities for cultural and national development in the Austrian Empire. Furthermore, it has been demonstrated that the collapse of empires and the formation of the Soviet Union significantly impacted urbanization and the cultural life of cities. In particular, it has been established that industrialization increased urbanization rates, and the influx of workers led to marked Russification, altering the population's lifestyle and the appearance of cities. The emergence of factories and plants made cities more industrialized—industrial agglomerations. However, after the dissolution of the USSR, the dominant influence of Russian culture persisted for an extended period, while Ukrainian culture found itself in an informal position in Ukrainian cities. The challenges of war have intensified the significance of the Ukrainian element in contemporary culture. Modern researchers studying the historical foundations of urbanization have indicated that cities have always promoted individualization and isolation; however, their scale and large populations facilitated self-expression (Posokhov, 2022). They contributed to the formation of individuality and the construction of identity as distinct and atypical.

The next task involved determining the impact of globalization on the urbanistic processes of culture. It has been established that when examining the search for general trends or directions in urban studies, one of the key events is the growing interest in urban culture. This is corroborated by the work of contemporary scholars (Marukhovska-Kartunova et al., 2024; Palamarchuk, 2024; Potlogea, 2018). In particular, an increasing number of researchers describe various discursive and cultural practices, the symbolic space of the city, and the issue of national identity (Potlogea, 2018; Shkola, 2023). Such questions are quite complex and contentious, as they are all synthesized from a perspective of plastic subjectivity. This occurs because individuals may perceive and easily alter the angle from which they evaluate

themselves and the surrounding world. However, without such testimony, it is impossible to adequately characterize the vibrant Ukrainian urban culture's interpretation. The results of this study correlate with the work of Anestis and Stathakis (2024), which indicates that urbanization is becoming a global phenomenon that is occurring rapidly, and no country can escape this trend. The study of urban representation in the era of globalization cannot be limited to specific external markers (Pavlov et al., 2024; Posokhov, 2022; Sayed, 2023). Accordingly, the symbolic urban space plays an important role, representing a distinctive city element with a symbolic world of signs, architecture, and landscapes. In the modern era, despite the popularity of 'mass culture' in huge cities, there is a constant search for their 'individual' culturally relevant 'face' (Posokhov, 2022). Thus, the contemporary city possesses various symbols that have developed in the consciousness of its inhabitants and visitors. These processes are synthesized based on modern technologies and are intertwined with diverse stereotypes and symbols, emotional reactions, and so forth (Iskakova, 2024; Shestopal et al., 2017). All these reflections also correlate with the results of this study.

The final task involved determining the current state of urbanization in Ukraine and characterizing the main challenges. Contemporary researchers have also noted that urbanization is currently developing intensively. Specifically, according to the United Nations, by 2030, 60% of the world's population will live in cities, with one in three residing in towns with at least half a million inhabitants (Posokhov, 2022). This correlates with the obtained results. Consequently, urban dwellers, including Ukraine, constitute a significant majority of the population in Europe today. However, this is not merely about quantitative data. According to some scholars, by the end of the 20th century, the typical 'non-urban' lifestyle, in a sense, ceased to exist (Posokhov, 2022). Thus, cities now play a crucial role as innovation centers, particularly in terms of exchanging ideas and experiences.

However, cities are also becoming clusters of problems that threaten the sustainable development of society. The range of these problems can vary. Accordingly, the final task of the research involved characterizing the main issues of contemporary cultural urbanization, considering the military realities. In this regard, the results demonstrate that alongside military destruction, pressing threats remain, including the potential for further Russification of Ukrainian urban culture and the decline of cultural life in small towns. The research by Anestis and Stathakis (2024) highlights other issues, including pollution, poverty, and climate change, which require effective urban planning and environmentally sustainable management of cities.

However, this research has certain limitations, particularly in selecting scientific literature and collecting primary data. Specifically, the study primarily includes English-language and, in some cases, Ukrainian-language works. However, works written in other languages have not been included, meaning that valuable information in these works has not been incorporated. Simultaneously, the geographical focus presents a limitation. Consequently, future research will primarily focus on a comprehensive study of European urban processes and undertake a comparative analysis of Ukrainian and European urbanization processes. Despite these limitations, this study is characterized by its scientific novelty, which implies a comprehensive approach to the issue of the impact of globalization on urban processes in Ukraine through the lens of historical understanding.

Conclusions

The development of urban culture in Ukraine has a long history, from antiquity to the present day. The accumulated cultural experience—often multicultural or even Russified—has been intertwined with characteristic architectural forms, European styles, and traditional folk art. National life has also transformed within musical, literary, and artistic traditions. Since gaining independence, this legacy has influenced urban life, merging with the forces of globalization. Cultural life has manifested in organizing artistic events, literary conferences, exhibitions, theatrical performances, installations, and other contemporary forms of creative expression. Digitization has also played a significant role, enabling the presentation of Ukrainian cultural achievements to an international audience while actively adopting existing international experiences. A considerable challenge for Ukrainian society as a whole has been Russian aggression, which has profoundly impacted the cultural life of Ukrainian cities. The destruction of infrastructure and cultural monuments and the loss of control over numerous cultural heritage sites pose severe threats to the preservation of national identity. The prospects for the further reconstruction of urban cultural life are intrinsically linked to the restoration of cities, the emergence of new architectural forms, and the creation of artistic spaces, among other factors. International cooperation could serve as a vital tool for such reconstruction, facilitating the necessary financial resources and ideas for further integration of Ukrainian cultural heritage into the international context.

Considering this study's potential methodological limitations, promising avenues for future research include engaging with a broader range of scholarly literature written in various languages. Additionally, a pertinent direction for further exploration is the in-depth study of European urban processes and the comparative analysis of the Ukrainian model of urbanization with its Western European counterparts.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Recreating the Past and Revealing the Postmodern Construction of Anabella of Silay in Rosario Cruz-Lucero's "Doreen's Story": A Historiographic Metafiction

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Abstract

This paper explores Rosario Cruz-Lucero's novella "Doreen's Story" as historiographic metafiction, specifically examining the postmodern construction of Anabella of Silay. Historiographic metafiction challenges traditional historical narratives through layered storytelling, intertextual references, and blending of fact and fiction. The character Anabella is analyzed comparatively alongside real-life Hiligaynon writer Magdalena Jalandoni, whose life parallels the fictional protagonist in numerous aspects. Employing comparative character analysis and historiographic metafiction as frameworks, the research scrutinizes these two women's narratives to reveal complex relationships between historical and fictional representations. The findings highlight significant parallelisms between the mythical character Anabella and the historical figure Magdalena Jalandoni, demonstrating how literature intertwines historical fact with fiction. This interconnection emphasizes the fluidity between history and narrative, questioning the nature of truth and authorship in historical representation. Additionally, the reconstruction of past events within the novella supports postcolonial objectives, such as reclaiming cultural spaces, asserting identity, and critically revisiting historical narratives. Ultimately, this study underscores the importance of historiographic metafiction in understanding literature's role in shaping, challenging, and reconstructing historical discourse.

Keywords: *Fiction, Historical fiction, Historiographic metafiction, Myth, Postmodern*

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Introduction

Many historians employ fictional representations to create imaginative and dynamic interpretations of historical realities. Aristotle, comparing the roles of historian and poet, argued that historians are confined to describing events that have already occurred, while poets—and, by extension, fiction writers—have the freedom to explore potentialities, thereby addressing broader universal truths. From this perspective, fiction can be viewed as more encompassing and insightful than history.

Indeed, history is often constrained by particular events and specific details, whereas literature encompasses the entirety of human experience. E.L. Doctorow further supports this notion by asserting, "History is a kind of fiction in which we live and hope to survive, and fiction is a kind of speculative history…by which the available data for composition is greater and more varied than what historians propose" (Kallookaran, 2007).

Postmodernism engages deeply with these paradoxes, highlighting the complexities of fictive versus historical representations, the particular versus the general, and the past versus the present (Kallookaran, 2007). Because historical narratives inevitably reflect the historians' perspectives, attitudes, and cultural backgrounds, complete objectivity in historiography remains unattainable. Even with identical materials and sources, historians will inevitably produce differing accounts. As Schneider (2008) notes, historiography inherently includes fictional elements and subjective interpretations.

These complexities give rise to historiographic metafiction, a postmodern literary style that explicitly bridges fiction and history. This research explores the significance of historiographic metafiction in interpreting postcolonial literary works, demonstrating that factual and fictional narratives are not mutually exclusive but intertwined, enriching and redefining traditional historical understanding.

Methodology

This study employs a qualitative research approach guided by the principles of Historiographic Metafiction. Utilizing this theoretical lens, the research systematically analyzes the narrative interplay between history and fiction within Rosario Cruz-Lucero's novella "Doreen's Story," specifically focusing on the character of Anabella of Silay. A comparative character analysis method is applied to juxtapose the fictional protagonist, Anabella, with the historical figure Magdalena Jalandoni, a renowned Hiligaynon writer from Silay, Negros Occidental.

Primary texts, including Cruz-Lucero's novella and archival materials documenting Magdalena Jalandoni's life and works, form the core data for this investigation. The narratives of both figures are critically examined for thematic similarities, narrative structures, cultural references, and intertextual connections, emphasizing how fictional and historical identities converge. This comparative approach highlights intersections between fiction and historiography, uncovering how Lucero employs metafictional strategies to reimagine historical narratives.

Interpretative analysis is then conducted, exploring how the novella's metafictional elements, particularly layered narratives and intertextual references, challenge traditional historiographical conventions. This methodological framework underscores the ways in which fiction can effectively reconstruct, reinterpret, and recontextualize historical realities, thereby bridging the gap between factual history and imaginative literature.

Historiographic Metafiction

Historiographic metafiction, a term coined by literary theorist Linda Hutcheon, refers to fictional works that self-consciously address the writing of history and the nature of historical knowledge. These works often blend historical facts with fictional elements, questioning the possibility of objective historical truth. Rosario Cruz-Lucero's "Doreen's Story," from her collection Feast and Famine: Stories of Negros, exemplifies this genre by intertwining real historical figures with fictional narratives, thereby challenging readers to reconsider the construction of history and identity.

Hutcheon (1989) states that historiographic metafiction includes two terms: postmodern fiction and historical fiction. Both terms were popularized in the nineteenth century, and when viewed and interpreted at first glance, they have identical meanings. However, in truth, these two terms are not the same. Even theorists find it difficult to differentiate these two terms because their opinions about the truth differ. Truth to them is relative; there are various kinds, versions, and specifics of the truth depending on the situation (societal situation) and the place and culture where the truth emerged. In short, there is no absolute truth. It is not only about the truth but also the impact of the existence of the truth itself. Theorists still try to distinguish the two terms, although only a thin line separates them.

Historiographic metafiction tries to combine the best of two worlds: it incorporates fictional elements, which it generously uses, and blends them with historical events, which may provide a framework that is filled with fictitious actions and protagonists; thus, "it unites the 'world' and literature" (Hutcheon, 1989).

To understand historiographic metafiction, it is necessary to know about the developments that changed the view on representation in the past decades:

> *A skeptical relativism has challenged the authenticity of historiography, and its truth claim. The denial of ultimate truth in representation led to the so-called postmodern crisis of representation. Suppose the image of the past is influenced by culture, which means that different cultural circles emphasize different aspects of historical events. In that case, there will always be more than truth. However, since art is not obliged and willing to provide a perfect copy of reality, it is free to deliver its message in a concealed way (Engler, 1994).*

According to Engler, the 'reality' presented to the reader "is the product of a complex process by which traditionally encoded images and texts structure our perceptions and determine the models by which we construct our notions of self and external reality" (Engler, 1994).

Although historiography is liable to interpretation, the history of a culture is essential for the individual because history is intelligible and comprehensive, and man is a sense-making being. A culture's shared history is vital because it is one of the main aspects – apart from religion, language, etc. – that distinguishes cultures (Engler, 1994).

> *Just like historians trying to give sense to history, fiction authors intend to make sense of things that seem chaotic or unintelligible and create something new in which factual truth and the necessity of reality become unimportant. The writer controls only his fictional reality, whereas the historian's realm is reality. Thus, the writer's freedom enables him to write literature that combines historical facts and fictional elements and creates different views on historical events (Engler, 1994).*

If historiography depends on interpretation and constructs reality, then why should historiographic metafiction not provide a 'true' image of the past, just like what historiography does?

From this perspective, the relationship between fictional and historical writing becomes very complex because they blend historiographic metafiction and participate in the historical discourse without being subdued by scientific representation standards. This mingling of history and fiction leads us to intertextuality (Hutcheon, 1989). The concept of intertextuality claims that a literary work is interdependent and defined by "the interdependence of any one literary text with all those that have gone before it" (Cuddon, 1977).

Postmodern literature often contains intertextual elements, although the phenomenon is not an invention of the 20th century. Intertextuality demands the reader to recognize the element as such and then think about its reference, which requires a specific awareness on the reader's side (Hutcheon, 1989).

Intertextuality is the fabric that weaves the array of texts, each drawing meaning and significance from those preceding it. It requires a reader to be highly aware, not only consuming the content but also actively engaging with it, recognizing and interpreting the myriad references that enrich the narrative. The beauty of intertextuality lies in its ability to transcend time and space, creating a dialogue between the past and the present and reimagining historical events through the lens of contemporary thought.

In postmodern literature, this intertextual dance becomes crucial, enabling authors to explore and challenge traditional narratives and blend the boundaries between fiction and reality. The reader is invited into a multidimensional experience, where each text serves as a portal to countless others, enriching the understanding and appreciation of the work at hand.

Historiographic metafiction fully embraces this concept, integrating historical discourse with literary creativity. It redefines the notion of 'truth,' presenting a narrative that is as much about the interpretation and representation of history as it is about the events themselves. This blending of fact and fiction allows for a more nuanced exploration of historical themes, highlighting the subjectivity inherent in all historical accounts.

Historiographic metafiction works to "demarginalize the literary through a confrontation with the historical, and it does so both thematically and formally" (Kallookaran, 2007). It also attempts to distinguish between fiction and history, clouding the difference in the process. Hutcheon posits that the postmodern relationship between fiction and history is an even more complex one of interaction and mutual implication. Historiographic metafiction works to situate itself within historical discourse without surrendering its autonomy as fiction. It is a seriously ironic parody that affects both aims: the intertexts of history and fiction take on parallel (though not equal) status in the parodic reworking of the textual past of both the "world" and literature. The textual incorporation of these intertextual past(s) as a constitutive structural element of postmodernist fiction functions as a formal marking of historicity literary and "worldly" (Hutcheon, 1989).

English fictionist Patricia Waugh notes that metafiction "suggests not only that writing history is a fictional act, ranging events conceptually through language to form a world-model, but that history itself is invested, like fiction, with interrelating plots

which appear to interact independently of human design" (Waugh, 1984). Historiographic metafiction is notably doubled, like this, in its inscribing of both historical and literary intertexts. Its specific and general recollections of the forms and contents of history writing work to familiarize the unfamiliar through very familiar narrative structures. However, its metafictional self-reflexivity renders any such familiarization problematic. The similarity is because both real and imagined worlds come to us through their accounts of them, that is, through their traces, their texts.

The ontological line between the historical past and literature is "not effaced but underlined" (Thiher, 2013). The past did exist, but we can only "know" that past today through its texts, and therein lies its connection to the literary. If the discipline of history has lost its privileged status as the purveyor of truth, then so much the better; according to this kind of modern historiographic theory, the loss of the illusion of transparency in historical writing is a step toward intellectual self-awareness that is matched by metafiction's challenges to the presumed transparency of the language of realist texts.

Differences between Postmodern Fiction and Historical Fiction

The following are the differences between postmodern fiction and historical fiction:

- Postmodern fiction focuses on an eccentric or marginalized figure character. The author factually describes the characters to form a narrative.
- Historical fiction focuses on the ideas in the story in terms of historical representations made by the author. It can be a current historical depiction or a historical representation that is different from the present image.
- Postmodern fiction uses two methods in the story: first, by putting forward the historical truth with some deliberately falsified historical records. Second, postmodern fiction uses historical data.
- Meanwhile, in historical fiction, Luke in Hutcheon (114) claims that the emergence of historical fiction is backed by the authors' inability to use valid historical data. The story is written, but the truth needs to be more relevant because valid data are used to clarify history. However, historical fiction adopts both ways of postmodernism to give a sense of trust and specificity to their work.
- In postmodern fiction, the author does not allow the moral decline of the historical characters. While historical fiction permits a moral decline of the main historical character.

- Postmodern fiction asks an ontological question like "How do we know the past"? Moreover, "what do we know now? While historical fiction presents the main character of history to strengthen the fictional story, thus making the boundary between fiction and history imperceptible.

Therefore, using the lens of Historiographic Metafiction, the connections between the past and present, the parallelism between the fictional and historical characters of Anabella of Silay and Magdalena Jalandoni shall be discussed and analyzed to show the possibility of a blending or fusion of these two binary opposites.

Findings

"Doreen's Story" as Historiographic Metafiction

Rosario Cruz-Lucero's Doreen Story, from the 2003 book "Feast and Famine: Stories of Negros," combines history and fiction. It questions historical facts, magic realism, academic research, and town gossip (Lucero, 2007). This novella is part of a collection that depicts Negrense's life from the Spanish colonial period to the post-Marcos era and is one of the most anthologized stories.

Narrative Structure and Metafictional Elements

Doreen's Story" employs a tripartite narrative structure:

1. The Frame Narrative: A fictionalized version of real-life food critic Doreen Fernandez recounts the story of Anabella of Silay over a meal with the narrator.
2. The Embedded Narrative: The tale of Anabella, a reclusive heiress from Silay, unfolds, revealing her sheltered life, forbidden romance, and eventual withdrawal from society.
3. The Metanarrative: Interjections from literary scholar Jonathan Chua and the narrator discuss the accuracy and interpretation of Anabella's story, blurring the lines between fact and fiction.

This layered storytelling technique exemplifies metafiction by drawing attention to the narrative's construction and the subjectivity inherent in historical recounting. The inclusion of real figures like Doreen Fernandez and Jonathan Chua further complicates the narrative, as their fictionalized portrayals interact with the fictional Anabella, creating a tapestry of interwoven realities.

Anabella of Silay: Constructing a Postmodern Heroine

Anabella's character is a composite of historical and fictional elements. Her story mirrors that of Magdalena Jalandoni, a real-life Negrense writer known for her reclusive lifestyle and literary contributions. By referencing Jalandoni, Lucero anchors

Anabella's narrative in historical reality while simultaneously fictionalizing her experiences.

Patriarchal control, societal expectations, and personal rebellion mark Anabella's life. Her father, Don Isidro, embodies the authoritative haciendero archetype, enforcing strict boundaries on Anabella's personal choices, including her romantic involvement with Francisco, an aspiring dentist of lower social standing. Anabella's eventual seclusion and prolific writing output can be interpreted as acts of resistance against the constraints imposed upon her, highlighting themes of female agency and autonomy.

Historiographic Metafiction and the Questioning of Historical Truth

Lucero's narrative challenges the notion of a singular, objective historical truth. The multiple perspectives presented in "Doreen's Story"—from Doreen's recounting to Jonathan Chua's scholarly critiques—underscore the subjectivity of historical interpretation. The story's metafictional elements prompt readers to question the reliability of narrators and the authenticity of historical accounts.

By blending factual and fictional elements, Lucero illustrates how history is often a construct shaped by those who record it. The story suggests that personal biases, societal norms, and cultural contexts influence historical narratives, thereby complicating the pursuit of objective truth.

> *The most compelling reason, however, for classifying Feast and Famine as a landmark in Philippine Literature is its ingenious treatment of the precarious and complex relationship between orality and literacy. The central preoccupation of most of the characters in these stories is telling stories, be it through a ladies' lunch ("Doreen's Story"), through personal mythmaking, or "storytelling-a-lie" ("Good Husbands and Obedient Wives"), or through the composo, a form of Hiligaynon extemporaneous folk song cum historical record, the subject of which is local current events (Pineda, 2003).*

"The Grand Dame of Hiligaynon Literature" by Magdalena G. Jalandoni, who is possibly the inspiration for the main character Anabella in Rosario Cruz Lucero's "Doreen Story" (Gonzales 1), one of the finest specimens of Hiligaynon Literature in English in the 21st century. The characters are memorable because they are the members of the familiar wealthy and eccentric family in Silay.

> *Three narratives make up Doreen's Story. Real-life food critic Doreen Fernandez sits in a restaurant with the narrator and recounts over panini and iced tea the story of Anabella of Silay (the second and main narrative). The telling of*

> *this second narrative is also interrupted by discussions of the narrator-writer with real-life literary scholar Jonathan Chua about the accuracy of the story's details. The main character is named after the eponymous protagonist of a short story written by a reclusive Negrense woman writer, Magdalena Jalandoni. Doreen plays an epic character in this story, but the reader is reminded, just at the right moment, that this is also just a cleverly crafted piece of artifice. It is metafiction at its finest (Pineda, 2003).*

Doreen Fernandez herself traced her roots from Silay City, Negros Occidental, the birthplace of her father. She was born on October 28, 1934, to Aguinaldo Severino Gamboa of Silay, Negros Occidental, and Alicia Lucero Gamboa of Cabanatuan, Nueva Ecija.

Doreen Fernandez has taught literature, composition, creative and critical writing, and journalism. Her research has been on cultural, literary, theater, and culinary history, on which she has written for scholarly and popular publications and has regularly been invited to speak at international conferences and symposia. She would have rendered 30 years in service at the Ateneo de Manila University in 2002 had she not passed away on June 24, 2002.

Feast and Famine: Stories of Negros grows out of the author's experience of childhood in Negros, an island south of Manila, famed for its sugar production. Doreen's story features a frame narrative in which the narrator meets the real-life food writer and scholar, Doreen Fernandez. The bulk of the story consists of a narrative that Doreen talks about Anabella of Silay, an heiress living in a small town. This narrative is, in turn, intercut with discussions with another real-life figure, academic 'Jonathan' apparently Jonathan Chua, editor of the study The Critical Villa-about the veracity of the story that Doreen tells (Patke, 2010).

The main character in the novella, Anabella of Silay, was first introduced by Magdalena Jalandoni in a Hiligaynon short story entitled "Si Anabella" in the 1930s. Jalandoni's story was translated by Corazon Villareal into Filipino in the revised Philippine Literature: A History and Anthology in 1994, edited by Bienvenido Lumbera.

At first glance, the story is typically romantic, which is very much a characteristic of when it was written: 1936-1938. Anabella's story (Jalandoni) starts with a melodramatic plot: the typical forbidden love affair between a rich boy and a poor girl. Their love was censored by the proud mother of the boy, owing to their gap in terms of social status. The love and faithfulness of the lovers will be challenged. Ultimately, poor Anabella will become unexpectedly rich, and love will triumph.

In Doreen's Story, however, the situation is reversed. The rich *haciendera* (Anabella) has found love in the arms of Francisco, a poor Dentistry student. Anabella's parents will not consent to their love affair, and the two will break up. After several years of hardships, the poor boy will become a dentist, marry a teacher, and start a happy family with his wife and kids. Anabella, in the end, became a recluse and died with a broken heart.

Discussion:

Anabella of Silay as Rosario Cruz-Lucero's new Magdalena Jalandoni

In the modern world where reason and evidence are given premium, myths like favorite bedtime stories for children passed on across generations are often brushed aside. It is entwined with one's growing years, but other than the nostalgia they bring, they have no greater significance.

Doreen's story is often seen as an urban legend spanning three generations—Anabella in the Spanish era, Magdalena in the early 21st century, and Doreen and Rosario Cruz-Lucero in contemporary times. It narrates great love and tragic loss while also highlighting the sacrifices made by Negrense society, from the insulares' effort to transform barren haciendas to the indios' enduring hardships, all aiming for a better life. This dream lives on through Anabella's tale, Magdalena's work, and Doreen's narration, enriching the history and culture of Negrense society and uniting the Filipino nation. Oral tradition and written literature have preserved the values of freedom, sovereignty, and the aspiration for a better life. The current generation faces the challenge of continuing this storytelling, especially with the power of digital technology at their disposal.

Doreen's story revolves around Anabella of Silay, the main protagonist, whose life has been a constant focus of interest among the townspeople due to her forbidden romance, mysterious reclusion, and withdrawal from the outside world. As a *haciendera* and the only heiress to the vast sugar plantation and other businesses of her father, much is expected from her:

> *Anabella was born nine months after that mysterious epidemic. You'd wonder why no other heirs existed, especially since she was a mere girl. But this was the American era, and hacienda heiresses were taught English and Math and could attend college in Manila or Europe. Maybe Don Isidro hoped that Anabella would have the spunk to take on the family businesses, especially if she had a husband who would have the zeal to run them in her name. But even during the Spanish period, hacienda heiresses rode out at dawn on horseback, pistols strapped*

> *to their waist and directed the work on the farm. These same women would don ribbons and lace in the evening and entertain guests. (Lucero, 2003).*

Don Isidro, Anabella's father, is a typical authoritative and bold haciendero and owner of many other businesses in Silay. He was the second son of an encomendero and so had no hope of being a master of his land. Don Isidro had come to Negros from Iloilo at the turn of the century and had started a leaseholder with a capital of 500 pesos that he had won in a cockfight. He then claimed a piece of forest land nobody wanted because the white Tamawos people had seen wandering in it (Lucero, 2003).

He was "strict enough to forbid the liaison between this dentistry student and his only child, the one on whom he depended to pass on his business genius in his blood down his family tree" (Lucero, 2003). He was also called Don Baga because his eyes glowed like live coal when angry. He could wield the whip on his workers when he was displeased with the quality of their work.

Anabella's mother (who was not named) was sophisticated and educated but very submissive. Her too much religiosity and her constant association with Fr. Van Amstel, the parish priest, was the root of Don Isidro's jealousy, which led him to shoot his wife to death and pull the trigger on himself. Her parents' marriage was ruined by implied adultery and her father's domination, which unfortunately ended in murder and suicide.

At seventeen, Anabella fell in love with Francisco, a penniless dentistry student. It was speculated that her father had forbidden her from marrying someone not of her status. This incident triggered Anabella's decision to isolate herself from her parents and the rest of the world. In her lifetime, Anabella's affair with the outside world has literally stopped. She lived the life of a recluse on the second floor of their bahay na bato. Occasionally, Anabella would observe from her balcony Francisco's children (Francisco has married Victoria, a teacher) playing outside.

> *Francisca Jalandoni, Magdalena's mother, was worried about her daughter, who was already of marriageable age. Still, although she did not lack suitors, she turned them down one by one: "Pulos mang-u" (They were all dumb, not bright, she told me, with a girlishly impish look and smile). Besides, her ideal man was Jose Rizal: educated, urbane, scholarly, idealistic, nationalistic, and good-looking. Above all, he, too, was a writer. What young Ilongo swain could compete with the national hero? (Varela, 1976).*

In an alternative ending, however, it sets out the possibility that Anabella was furious over her lover's secret desire for her mermaid friend and chose not to go on

with their marriage. Upon her death, Anabella left behind a vast load of literary works, a product of her generations-old isolation inside her *bahay na bato*.

> *When Anabella dies on September 14 next year, she will be discovered to have written 72 novels, 122 short stories, seven novelettes, five corridos, eight narrative poems of 100-1000 stanzas each, 231 short lyrics, seven long plays, 24 short plays and dialogos in verse, seven volumes of essays and two autobiographies (Lucero, 2007).*

Just like Anabella of Silay, Magdalena G. Jalandoni's vast literary life works consist of the following:

> *The prodigious literary wealth produced by Magdalena Jalandoni's pen is revealed in the following figures (a recent count, which was only a rough estimate, was made upon my request): 366 poems, 212 short stories, 25 novels, 60 essays, 13 dramas, seven melodramas or dialogos, 125 aphorisms. In addition, more than 25 novels (Mahal pa sa Kabuhi? Dearer than Life; Ang Balay nga Walay Too? The Deserted House; Ang Malaw-ay nga Dalaga? The Ugly Spinster, to mention a few titles) were burned after they had been placed in the bishop's residence for safekeeping, in a fire during World War II. Also, the length of some narrative poems had to be considered to appreciate Magdalena's industry and untiring labor fully. To cite some examples, "Angya", a narrative poem written in 1927, is 129 pages long (on 8 l/2" 'x 13" size paper); "Kaluukan" is 186 pages; "Kan Silayan," 181 pages; "Lucresia Magsilak," 125 pages. One of her verse dramas in three acts, "Kabuhi hag Gugma" (Life and Love). is 61 pages in length (Varela, 1976).*

Doreen's story is not only about Anabella's story as told by Doreen; it is about the storytelling process that turns a person into a town legend and a work of fiction in the frame narrative. Moreover, Anabella is revealed to be not just a historical character or a town legend but also a writer herself. In a list that parallels Magdalena Jalandoni's outputs, Anabella is revealed to have written a massive literary collection during her period of seclusion.

Anabella may be considered a representation of the rich and famous (*illustrado*) class in any community in the Philippines. Occasionally, they draw the attention of the common person, represented by Francisco, a dentistry student, who is the love of her life. They are perceived to be very self-sufficient and well-provided for all conceivable needs. Yet unknown to many, they live a very lonely life in which academic feats become silent witnesses, if not camouflage. Anabella is torn between being duty-

bound to her family, class, and social expectations as the sole heiress to a vast hacienda, and the summons of her heart.

The hacienda sums up everything his father labored all his years, the community he has gathered (*haciendero – caminero*), and the life he has built for Anabella and her future brood. The hacienda signifies the vestiges of the withering Spanish colonialism at the time. Indios who have labored hard to build the little empires of *encomenderos* and *hacienderos* with the whip piercing their frail malnourished bodies have learned to emancipate themselves from their bondage from the land through education, herein personified by Francisco (dentist) and Victoria (teacher), and their children playing in the yard, not working on the farm.

On the other hand, the summons of the heart reveals the genuine and honest desire of the new generation of *insulares*; something willing to go beyond the imaginary, oppressive social rules. Given the chance, Anabella could have married Francisco and started her own family, enunciating (Bhabha) a new identity (hybrid).

Historical or literary genius, the voluminous works discovered after the death of the mythical character Anabella, are testimonies to the silence. Still, persistent cries to reach out, go out, connect, unite, and integrate from the comforts of the self to the other (liminality). Personified by Anabella, here is a passionate yearning to build a nation that is not exclusive to one class but includes all. Something that Anderson and Hau label as integrative nationalism.

In the same breath, the story is a stark warning against continuing the path of being fixated on colonialist mentality, class consciousness, and exclusivity. It is bound to end in self-destruction, as exemplified by the murder and suicide of Anabella's parents, or extinction, as shown by Anabella herself not being able to build a family of her own.

Historiographic metafiction is a quintessentially postmodern art form, relying on textual play, parody, and historical re-conceptualization (Butler, 2010). Therefore, the works of historiographic metafiction are "those well-known and popular novels which are both intensely self-reflexive and yet paradoxically also lay claim to historical events and personages" (Butler, 2010). The famous Hiligaynon writer, Magdalena G. Jalandoni, became the blueprint of Anabella's character in "Doreen's Story". However, other details are not faithful to the original biography of Jalandoni.

According to Waugh, they additionally engage and unveil the parallels between writing literature and historiography – the practice of writing history – suggesting that both are acts of construction that do not reflect or naively represent reality or the past but (re)invent and shape them from necessarily subjective and ideologically laden perspectives. She does not claim that history and fiction "adopt equivalent

representational procedures or constitute equivalent modes of cognition" (Waugh, 1984).

On the other hand, Hutcheon believes that "the simultaneous and overt assertion and crossing of boundaries are more postmodern." She states that historiographic metafiction, not historical fiction, serves to narrate the past (Kallookaran, 2007). Thus, the novel at once "creates a fiction and then makes a statement about the creation of that fiction;" the simultaneous construction of fictive illusion and the laying bare of that illusion fulfills the definition of metafiction (Waugh, 1984).

Conclusions

The above discussion established that historiographic metafiction reconciled that which separated art from the "world," Literature from History. This was done by using intertextuality. Another dimension is added through the ironic inversions of parody, as was shown in the novella "Doreen's Story" by Rosario Cruz Lucero.

In her novella, she reconstructed the mythical character of Anabella of Silay while consciously or unconsciously blending her narration using a true-to-life historical icon, the Hiligaynon award-winning writer Magdalena G. Jalandoni.

History and literature provided the intertexts in the novella examined here. The autonomy of art is maintained; metafictional self-reflexivity even emphasizes it. However, within this seemingly different character portrayal of Anabella, some points of her life story mirrored the life story of Magdalena Jalandoni. Their respective stories are both part of the signifying systems of Hiligaynon culture; both Anabella and Magdalena are natives of Silay City in Negros Occidental.

Although historiography is liable to interpretation, the history of a culture is essential for the individual because history is intelligible and comprehensive, and man is a sense-making being. The common history of a culture is vital because it is one of the main aspects – apart from religion, language, etc. – that distinguishes cultures (Engler, 1994).

Just like historians trying to give sense to history, fictionists intend to make sense of things that seem chaotic or unintelligible and create something new in which factual truth and the necessity of reality become unimportant. If the writer controls only his fictional reality, the historian's realm is reality (Engler, 1994). Thus, the writer is free to write literature that combines historical facts and fictional elements and creates different views and landscapes of historical events through these. They both make and make sense of our world. This is one of the lessons of the most didactic of postmodern forms: historiographic metafiction (Hutcheon, 1989).

Rosario Cruz-Lucero's "Doreen's Story" serves as a compelling example of historiographic metafiction, utilizing layered narratives and intertextual references to explore the construction of history and identity. Through the character of Anabella of

Silay, Lucero examines themes of female agency, societal constraints, and the subjectivity of historical truth. The story invites readers to reflect on the ways in which history is recorded, interpreted, and retold, emphasizing the complexities inherent in reconstructing the past.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Experimental Artistic Practices in Contemporary U.S. Culture: Identity Transformation and Global Influence

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Abstract

This article investigates experimental techniques in contemporary American art and their global impact. The research explores how contemporary American artists, particularly James Turrell, Jenny Holzer, and Bill Viola, employ experimental techniques through their aesthetic experiences, motivations, and intentions. It also examines how the international art community perceives these techniques. A phenomenological approach was employed, emphasizing subjective experience and interpretation. The findings reveal that experimental art practices in the United States are characterized by innovation and unconventional approaches, with techniques such as light and space manipulation, text-based art, and video art widely used. Additionally, bioart, interactive and participatory installations, and digital art expand the scope of experimental practices. These works reflect critical social and political issues and invite audience responses, constructing new realities through innovative materials and techniques. The study demonstrates the significant global influence of American experimental art, contributing to cross-cultural dialogue and the evolution of contemporary artistic discourse. The findings hold implications for integrating interdisciplinary, technology-oriented approaches into art education and curation, encouraging innovation and audience engagement.

Keywords: *audience participation, digital art, emotional engagement, installation, political and social issues, text-based art.*

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Introduction

Since the early 20th century, modernity has been a defining marker of progress, directly connecting various aspects of human activity (Krys et al., 2022). Contemporary art traces its diverse origins to movements such as Cubism, Futurism, Dadaism, and Surrealism, which rejected traditional norms in favor of innovative, often fragmented modes of expression (Theodore, 2024). As a reflection of everyday life, these movements promoted abstract ideas and new forms, establishing modern art as a multifaceted concept (Casale, 2024; Pavliv et al., 2024). Today, art is deeply intertwined with technological advancements (Düzenli & Perdahçı, 2024) and cross-cultural discourse (Pedroso et al., 2023). Digital media, AI, and VR have expanded artistic possibilities (Storozhyk, 2024), while political, social, and environmental issues continue to inspire contemporary artists (Astorga, 2024; Dobrolyubska et al., 2024; Johnstone & O'Hare, 2023).

The United States has played a central role in shaping modern art, often characterized as "for the people, by the people" (Hefka, 2020). Through experimental and interdisciplinary approaches, American artists have contributed to global artistic practices (Christou, 2023), inspiring new movements and fostering cross-cultural dialogue (Jones et al., 2020). Pop Art, Minimalism, Conceptual Art, and Happenings in mid-20th century America reflected broader social and political phenomena and influenced global perspectives (Silka, 2025). Contemporary artists increasingly integrate digital technologies, engaging with themes of cultural identity, race, gender, and environmental concerns (Christou, 2023). Immigration has further enriched American art by introducing diverse cultural influences (Loots & van Andel, 2025), promoting transformational co-creation and innovation.

The rise of experimental techniques in American art reflects a cultural shift towards innovation, individuality, and the rejection of traditional boundaries (Martínez, 2021). These practices incorporate unconventional materials, integrate technology, and emphasize interactivity (Novak-Leonard et al., 2022; Yahaya et al., 2024). They blur distinctions between art forms (Smith, 2019) and engage viewers in deeply personal, cultural, and social narratives (Christou, 2023). Experimental art often embraces unpredictability and transformation, inviting audience participation and fostering dynamic, interdisciplinary environments.

To explore these experimental practices, this study employs a phenomenological approach, focusing on subjective experience and perception (Yunlong et al., 2024). This method emphasizes intentionality, natural attitude, and intersubjectivity (Cudjoe, 2023), framing art as a phenomenon existing within the viewer's perception (Gupta & Zieske, 2024). Phenomenology shifts the focus from

historical analysis to immediate experience, encouraging deep engagement with artworks.

The novelty of this research lies in its comprehensive analysis of experimental techniques, combining theoretical insights with artists' perceptions. The study aims to investigate the phenomenon of experimental techniques employed by contemporary American artists, focusing on their aesthetic experiences, motivations, and intentions, as well as the global impact of these practices. To address these objectives, the research poses the following questions: (1) What experimental techniques are most actively used by contemporary American artists? (2) How do these artists perceive the process of experimentation, and how are these techniques interpreted by viewers and art critics? (3) What impact do these experimental practices have on the global art community?

The Representation of Experimental Artistic Practices in the USA

Experimental artistic practices in the United States have emerged within avant-garde content and postmodern theories (Mohan, 2024). These practices are famous for their ability to expand the boundaries between artistic production, technology, and social interaction. The American context, being innovative, provided the ground for the development of diverse art forms (Loots & van Andel, 2025). They referred to broad aesthetic outcomes as products of great aesthetic value (Carrasco-Barranco, 2025). Regarding some works, these practices represent forms of behavior that center around observers' interactions (Mol et al., 2020). According to Cudjoe (2023), experimental art has an unpredictable nature that makes it interesting to the audience.

The theoretical framework of American experimental art is closely connected with various concepts. Anghel et al. (2022) differentiate interactivity and hybridity affecting cognitive and visual perceptions. Today, many experimental practices position the viewer as an active participant. This redefines the artwork as an open system that requires continuing involvement. Such characteristics challenge fixed meanings and hierarchical structures of traditional art. As a result, experimental art fulfills the audience's demands and contributes to modernistic tendencies. It was found that this approach often engages with the idea of the "posthuman" (Harris & Holman Jones, 2022). It means that experimental art problematizes any individualist approach. In this context, it is important to add that experimental art involves human-centered narratives that focus primarily on human experiences, emotions, values, and perspectives.

Experimental artistic practices function as tools since they are able to explore new forms of knowledge and experience. Some findings (Jones et al., 2020) reflect

technological and scientific advancements. Sooudi (2020) indicates that experimental artistic practices propose alternative modes of perception and communication between members of society. Therefore, these practices suggest the possibility of new aesthetic and ethical paradigms.

Studying experimental art in the United States necessitates uncovering the most prominent practices to understand their unique characteristics and defining features. A key area is performance art, which emphasizes live activities and audience participation, as exemplified by Marina Abramović (Novak, 2024). In the late 20th century, interactive art emerged as a significant experimental technique (Droitcour, 2020). American artists such as Rafael Lozano-Hemmer created projects where viewers' actions directly influenced the artwork through sensors or sound. Digital art and bioart have also gained prominence, exploring new intersections between technology and organic forms (Mattanovich et al., 2024). Installation art, particularly large-scale, light-based installations that immerse viewers in manipulated landscapes, has also become a central practice. Notable American artists in this field include James Turrell (Roden Crater), Dan Flavin (Untitled), Bruce Nauman (Mapping the Studio I), and Jenny Holzer (Protect Protect) (Martinovic, 2025). Furthermore, experimental sound art, which incorporates broadcast signals as source material and explores new acoustic genres, has emerged as a critical form. Kelly (2024), examining audio and sound-focused art exhibitions in New York during the late 20th century, highlighted how sound was increasingly recognized as a medium of visual art, with sonic works displayed within traditional gallery spaces.

Each of these practices challenges traditional forms like painting or sculpture. They open up new sensory experiences. More importantly, experimental techniques introduce technological and conceptual possibilities for artistic creations. To achieve the research objectives, it is necessary to proceed to the analysis of phenomenological approaches to the interpretation of art.

Phenomenological Approaches to the Analysis of Art

Rooted in Edmund Husserl's and Maurice Merleau-Ponty's discoveries, phenomenology is called "the study of consciousness' structures and subjective experience" (Makhlouf, 2021, p. 6). This orientation positions the artwork as a phenomenon that reveals itself through the dynamic interaction between the creator and the audience (Yunlong et al., 2024). Central to phenomenological approaches is the notion that perception is an active process. Maurice Merleau-Ponty's concept of the "lived body". It introduces the idea that bodily presence is essential to the aesthetic experience (Makhlouf, 2021). At the same time, it emphasizes that vision and

movement are integral to art and contribute to the understanding of artistic creations. Similarly, phenomenology asserts that the meaning is not imposed upon an artwork from the outside. A number of scholars state that the meaning arises from the intentional act of consciousness created by an artist during his/her work (Cudjoe, 2023; Hughes, 2021).

Additionally, the analysis of scientific literature highlights the theoretical contributions of Rudolf Arnheim. Arnheim posited that art is "infinitely interpretable" or wholly subjective (Trimarchi, 2024), emphasizing the perceptual and cognitive dimensions of artistic experience. He argued that traditional assumptions often perceive the visual world as composed of "objects" in motion. As Coppola (2023) noted, citing Arnheim's Art and Visual Perception (1974), individuals typically interpret these components as "things" defined by their physical properties, shapes, dimensions, as well as colors, textures, and other sensory attributes (p. 226). This perspective underscores the interplay between perceptual processes and cognitive interpretation in experiencing and understanding art.

Contemporary phenomenological approaches continue to build upon these foundational ideas, expanding their application across diverse artistic forms. Notably, digital and immersive media have garnered special attention, as highlighted by Düzenli and Perdahçı (2024). Current scholars, such as Hughes (2021), emphasize the temporal, spatial, and multisensory dimensions of artistic experience, which are essential considerations in analyzing art. Consequently, phenomenology offers a powerful framework for examining the levels of perception and sensation involved in viewing artistic objects. Its potential to embrace subjectivity and human-centered narratives allows for a deeper and more nuanced appreciation of the aesthetics of contemporary art.

Critical Reviews of the Global Impact of American Experimental Art

The global impact of American experimental art has been widely examined in academic discourse, often highlighting issues such as cultural dominance (MacKay, 2022), digitalization and innovation (Martínez, 2021), environmental considerations (Yahaya et al., 2024), and the influence of immigration art (Loots & van Andel, 2025). The post-World War II era marked an intensive development of American experimental practices (Mohan, 2024), which today encompass performance art, conceptual art, and digital experimentation (Brown, 2024; Smithson, 2019). Scholars have also investigated the complexities of globalization in art, emphasizing the role of American experimentalism in broader political, economic, and ideological processes (MacKay, 2022).

The historical evolution of experimental art has been a recurring theme in scholarly works. Early studies trace the origins of experimental practices in post-war America (1950s–1960s) (Mohan, 2024), while others examine the influence of movements such as Abstract Expressionism, Minimalism, and Conceptual Art on both American society and the international art community (Valance & Zhurauliova, 2022). Key experimental practices—including performance art (Brown, 2024), interactive art (Jeon et al., 2019), digital art (Wang & Wang, 2021), and installation art (Morrissey, 2019)—have been comprehensively described. The integration of technology into experimental art has been a major focus, with scholars like Jones et al. (2020) analyzing its impact, while special attention has been given to artificial intelligence and virtual reality (Hall & Schofield, 2025; Storozhyk, 2024).

The cultural and social contexts surrounding American experimental art have also been explored. Christou (2023) examined the cultural dynamics of these practices, while Davis (2020) highlighted the influence of political movements—such as civil rights and feminism—on experimental art's development. Studies have also focused on individual artists and landmark works, such as Marina Abramović (Burello, 2023), James Turrell (Waterhouse, 2022), Allan Kaprow (Routledge, 2022), and Carolee Schneemann, whose performance and body art challenged the conventions of gender, sexuality, and bodily representation (Horne, 2020). Araújo (2024) further contributed to this discourse by exploring Laurie Anderson's integration of performance, technology, storytelling, and sound.

Importantly, the diffusion of American experimental art practices is not merely an aesthetic phenomenon; it also reflects dynamics of power and cultural circulation. Scholars argue that the global prominence of American models has sometimes marginalized local artistic traditions (MacKay, 2022), with the export of experimental art often failing to align with the historical and cultural contexts of regions outside the Western sphere. In response, contemporary theoretical approaches advocate for a nuanced understanding of global artistic flows (Casale, 2024), rejecting a one-directional interpretation of American experimentalism and instead emphasizing a networked perspective on global art interactions.

While numerous studies address the emergence of experimental techniques in contemporary American art, much of the existing literature tends to focus on isolated movements or individual artists, overlooking systemic patterns. Many works highlight the innovation introduced by American experimentalism but rarely examine the adaptation of these techniques within different cultural contexts. Comprehensive studies exploring the mechanisms through which these practices traverse cultural boundaries—particularly in non-Western environments—remain scarce. Moreover,

while aesthetic dimensions are frequently emphasized, experimental art's socio-political, technological, and institutional influences are often underexplored. There is also a notable lack of attention to emerging experimental forms inspired by American practices, particularly in response to contemporary global crises. These gaps underscore the necessity for an integrative and sensitive approach to understand the evolving influence of American experimental art techniques fully.

Methodology

This study employed a phenomenological approach to uncover experimental art techniques in the United States, offering a powerful framework for achieving the research objectives through an exploration of subjective experiences from both artists and viewers. Within this framework, phenomenology aims to understand the constitution of meaning behind experimental techniques, focusing on participants' perceptions and interactions. The findings indicate that the topic aligns naturally with phenomenological inquiry, as it inherently involves sensory and emotional engagement. This approach enabled the researchers to highlight how experimental practices reshape the American artistic landscape. The application of phenomenological methods—including descriptive analysis, first-person perspectives, and interpretive inquiry—facilitated the examination of external forms and historical contexts, while simultaneously delving into the internal processes that define experimental art. Moreover, these methods allowed for the analysis of experimental techniques in real time, capturing the dynamic and open-ended nature of contemporary artistic practices. Throughout the research, participants were encouraged to contribute their experiences and interpretations, enriching their understanding of the creative works.

The data analysis for this research was grounded in a comprehensive review of diverse sources. Primary sources included the artists' own interviews, public talks, official websites, and exhibition catalogs, providing direct insight into their artistic intentions, techniques, and conceptual frameworks. Secondary sources, such as academic articles, critical reviews, and books on contemporary experimental art, offered scholarly interpretations of the artists' practices. Additionally, media publications, documentaries, and museum archives were utilized to trace both public and critical reception over time.

Table 1. The impact of intercultural communication on national identity through artistic practices

Indices	James Turrell	Jenny Holzer	Bill Viola
Year of birth	1943	1950	1951
Location	Los Angeles, California	New York City	Los Angeles, California
Educational background	BA degree in perceptual psychology (Pomona College); MA degree (Claremont Graduate University)	Pratt Institute in Brooklyn; MFA degree (Columbia University)	New York Institute of Technology; MFA degree (University of California, Irvine).
Artistic style and techniques	installations that manipulate viewers' sensory perception through architecture, optical illusions, and controlled lighting.	Text-based art, which integrates language into public spaces and contexts. Her works use electronic billboards, LED displays, and posters.	video art using high-definition video technology and incorporation of sound and water.
Recognition and awards	MacArthur Fellowship (1984) National Medal of Arts (2013)	Lange-Taylor Prize for art and activism Golden Lion at the Venice Biennale (1990)	Guggenheim Fellowship (1989) multiple honorary doctorates

Colaizzi's approach was applied to the data analysis, providing a structured framework for interpreting participants' responses. This process began with a thorough reading of all collected materials to gain an overall understanding of the artists' narratives. Significant statements related to experimental artistic practices were identified, extracted, and interpreted. These statements were then organized into thematic clusters, which were subsequently used to address the research questions. To ensure validity, the findings were cross-referenced with the original sources, maintaining fidelity to the participants' intended meanings.

Ethical considerations were integral to the study, ensuring a respectful and accurate representation of the artists' perspectives. This approach safeguarded the integrity of their original ideas and artistic expressions within the scientific discourse. As the study primarily relied on publicly available data, special care was taken to analyze the material accurately and to avoid potential misinterpretations. Furthermore, the research design was conscientiously developed to mitigate personal or cultural biases in interpreting experimental art practices.

Findings

RQ1: Which experimental techniques are most actively used by contemporary American artists?

The analysis of primary and secondary sources enabled the researchers to summarize the experimental techniques most actively employed by the selected artists. For instance, James Turrell is renowned for his manipulation of light and space, as highlighted in various scientific discussions (Waterhouse, 2022). His installations emphasize the experiential quality of light, frequently incorporating natural illumination, artificial projections, and perceptual interventions designed to influence the viewer's sensory perception (Hewitt, 2024). In contrast, Jenny Holzer introduces text-based art, transforming language into sculptural and spatial elements. According to Attewell (2023), Holzer utilizes LED displays, projections, and virtual reality to present text in compelling and unexpected ways. Her works often insert politically and socially charged language into everyday environments (Princenthal, 2024), prompting viewers to confront power, violence, and vulnerability issues. Meanwhile, Bill Viola is known for his innovative use of video art (Uyar, 2022). His installations employ a subtle interplay of sound, light, and temporal dynamics to evoke profound human experiences—such as birth, death, suffering, and spiritual awakening (Griffin, 2024). Viola's approach not only fosters deep emotional engagement from viewers but also, as Uyar (2022) notes, inspires individuals to reflect and cultivate creativity.

Figure 1 provides a comparative analysis of the experimental techniques employed by the three selected artists—James Turrell, Jenny Holzer, and Bill Viola—highlighting their distinctive contributions to contemporary experimental art.

The Figure 1 demonstrates that all three artists expand the formal boundaries of contemporary art, reconstructing the temporal experience and evoking emotion in viewers through diverse techniques and materials. Collectively, their works reflect a broader shift in late 20th-century American experimental art.

In parallel, the analysis of secondary sources revealed additional experimental art techniques. These include bioart, which incorporates living materials into artworks (Mattanovich et al., 2024), and interactive and participatory installations that engage viewers as active participants in the artistic process (Jeon et al., 2019). Particular attention has been given to digital art, which generates multimedia narratives and immersive environments (Wang & Wang, 2021). Experimental installation artists have redefined spatial and perceptual experiences by manipulating light, space, and atmosphere (Waterhouse, 2022). As Morrissey (2019) notes, installation art often dissolves the boundaries between the artwork and its natural surroundings, encouraging viewers to develop sensory awareness and interpret the deeper meanings

of the projects. The incorporation of unconventional materials in artistic practice challenges traditional notions of fine art (Yahaya et al., 2024), prompting a reevaluation of materiality, process, and temporality. These innovations have sparked in-depth discussions on the evolving relationships between art, environment, technology, and society.

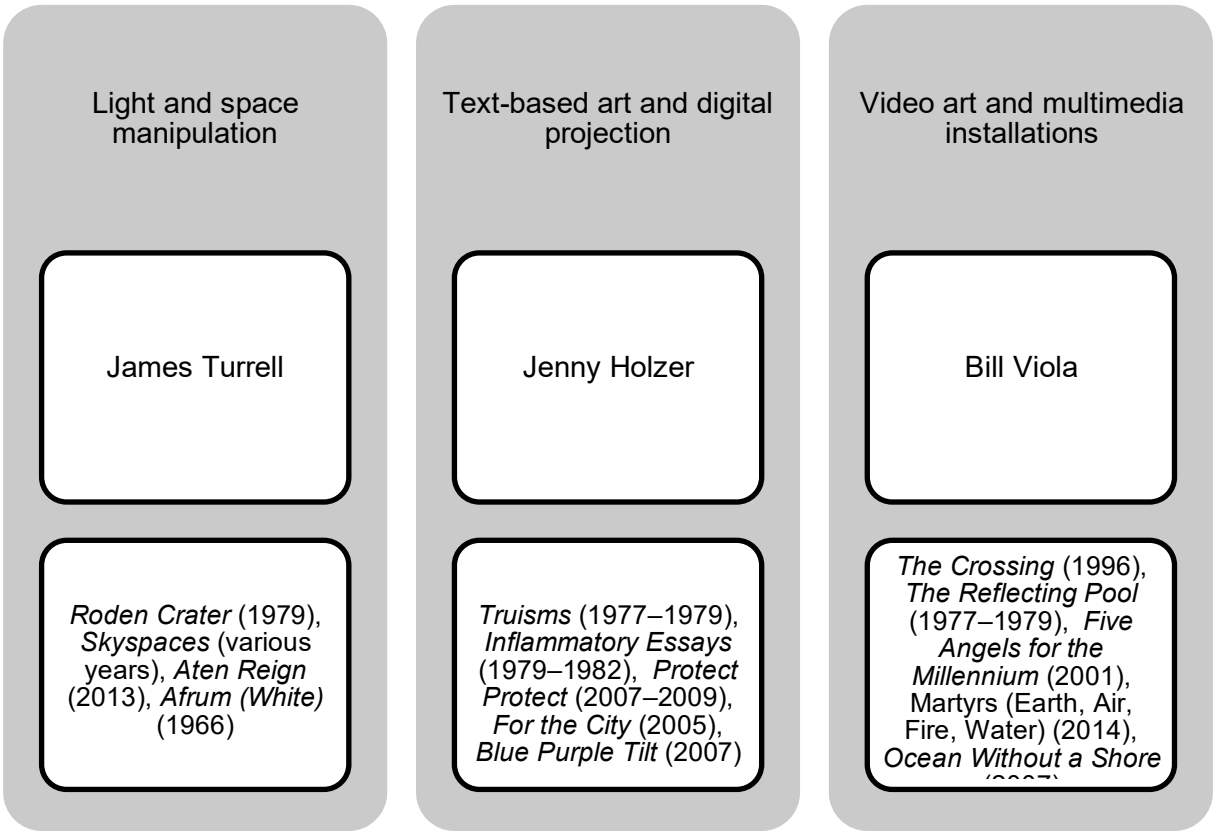

Figure 1. Experimental techniques of research participants

The data presented in Table 2 facilitated the organization of structured knowledge and enhanced understanding of the research problem. Further analysis was then required to explore the artists' perceptions of the process of experimentation.

Table 2. Experimental Techniques in Contemporary American Art.

Experimental technique and representatives	**Description**	**Materials**	**Meaning**
Bioart (Joe Davis, Eduardo Kac)	combination of molecular biology, genetics, and fine arts; use of genetic engineering and biotechnology to	DNA sequences, bacteria, yeast cells, sound waves, genetically modified organisms	challenging notions of life, ethics, and technology; exploration of the themes of identity, trans-species relationships, and the ethical implications of genetic manipulation

	create living artworks		
Interactive and participatory art (Rafael Lozano-Hemmer)	technological mediation and public participation	biometric sensors, surveillance systems, robotics, light projections, voice recognition technologies	addressing the themes of surveillance, control, individuality; studying the impact of technology on human behavior and society
Digital art (Laurie Anderson, Jenny Holzer, Bill Viola)	multimedia storytelling, live performance, electronic music integration, experimental animation, LED installations, internet art, video art	voice filters, virtual reality tools, electronic billboards, projection technology, light installations, online platforms, video technology	exploration of human communication, memory, and technology in the context of social and political issues; deepening emotional and spiritual experiences
Installation art (James Turrell, Robert Irwin)	light manipulation, spatial illusions, site-specific installations, minimalism, environmental interventions	natural and artificial light, architectural structures, fog, glass, and optical devices, landscape elements (trees, stones, water)	focusing on perception itself; challenging normal ways of understanding reality; increasing awareness of space, time, and movement
Use of unconventional materials (Robert Rauschenberg)	mix of painting and sculpture	found objects and everyday materials (old clothes, newspaper clippings, furniture parts, etc.)	showing that real meaning is not fixed; is seen art as a living thing interacting with real-world materials.

RQ2: How Do Artists Perceive the Process of Experimentation? How Are These Techniques Understood by Viewers or Art Critics?

Interviews and articles from popular magazines provided rich material for analyzing artists' perceptions of experimentation as a process of exploring new techniques, materials, and concepts. It was revealed that many artists perceive experimentation as a mechanism for their creative evolution (McCallum, 2024) and as a means of discovering new artistic practices (Loots & van Andel, 2025). Notably, experimentation is commonly understood as a method of inquiry, enabling artists to grapple with uncertainty and the nature of reality (Robbins, 2022).

During this study, it was found that James Turrell views experimentation as a fundamental process of perception (Waterhouse, 2022). For Turrell, art is a medium for engaging extensively with light and constructing new environments, relying on direct sensory impacts and requiring careful observation. He perceives experimentation as an ongoing dialogue between physical environments, technology,

and human awareness. On the other hand, Jenny Holzer approaches experimentation through language (Chrzanowska-Kluczewska, 2024), treating text as a dynamic material. For Holzer, experimentation is essential for engaging audiences and provoking thought (Attewell, 2023). In contrast, Bill Viola characterizes experimentation as a spiritual and philosophical exploration, considering video his primary medium (Uyar, 2022). Viola constructs environments that significantly impact viewers' emotional and spiritual states through video technologies, soundscapes, and deliberate staging.

Figure 2 presents a detailed outline of the artists' perceptions of the experimentation process, incorporating their direct speech and quotations drawn from social media, popular magazine articles, and video interviews.

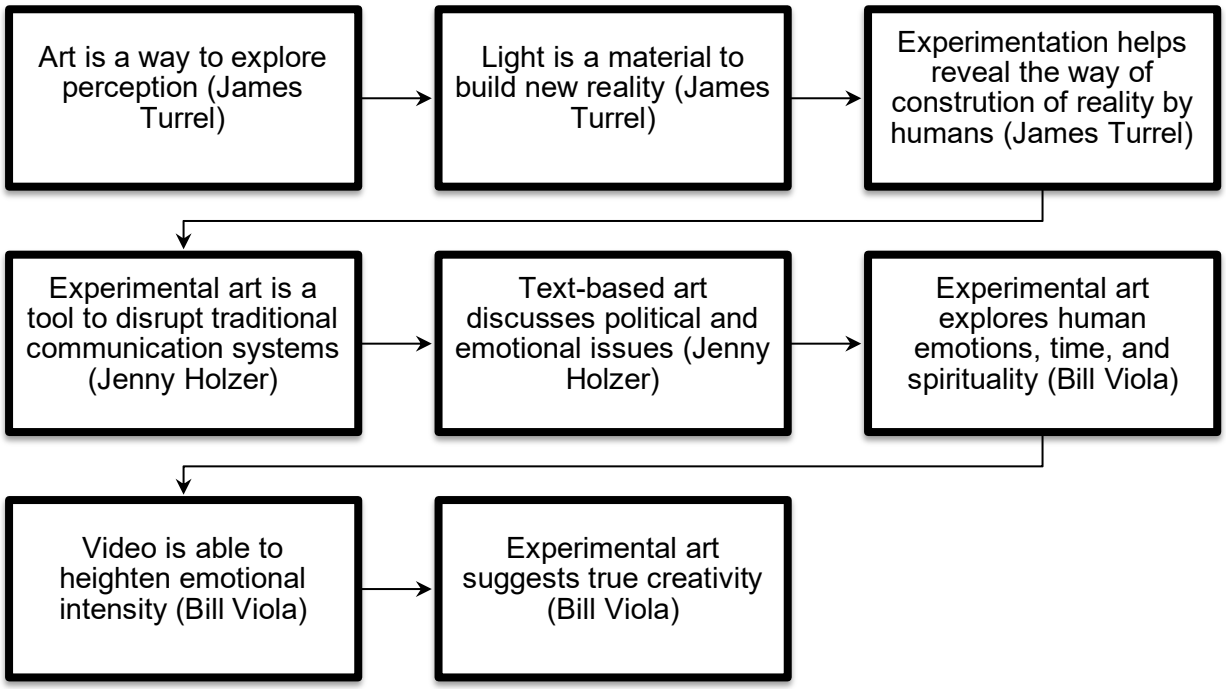

Figure 2. Artists' Perception of the Process of Experimentation

According to primary and secondary sources, the experimental techniques of James Turrell, Jenny Holzer, and Bill Viola have found strong resonance among viewers and art critics. For instance, Turrell's manipulation of light and space is frequently interpreted as a universal exploration of perception and spirituality (Bennett, 2019). In James Turrell: The Art of Light and Space, C. Adcock (2023) explains how Turrell's works address visual perception's nature, emphasizing its wonders and limitations. Turrell's collaboration with the Garrett Corporation, a major aerospace

and defense company, provided him access to advanced aerospace technologies, materials, and engineering expertise (Warehouse, 2022), which significantly influenced his artistic practice and provoked what some scholars term "aerospace thinking." One of Turrell's most renowned installations, Skyspace, features the use of natural and artificial light, color, and spatial manipulation (McKnight, 2022). This immersive installation presents a "sky observatory" that invites viewers to engage with the atmosphere, fostering a contemplative and introspective experience.

Figure 3 illustrates the interior of Turrell's Skyspace installation, providing visual context for his exploration of light, space, and perception.

Figure 3. Inside of Skyspace Installation by James Turrel. Source: McKnight (2022)

Jenny Holzer's text-based interventions are understood within contemporary society's political and historical contexts. Her work engages with urgent societal issues, including the AIDS epidemic, conflicts in the former Yugoslavia, Iraq and Syria, and gun violence (Schwarz, 2019). Holzer blurs the boundaries between art and everyday communication by employing language as an artistic medium, focusing particularly on the content conveyed (Princenthal, 2024; Schwarz, 2019). According to Chrzanowska-Kluczewska (2024), Holzer's use of clichés, slogans, and aphorisms serves to adorn architectural landmarks with impactful messages. This dynamic interaction of texts within cultural environments is conceptualized as the semiosphere—a space where language and meaning coalesce and evolve.

Figure 4 depicts Untitled (Truism) by Jenny Holzer. The installation, notably untitled, underscores the notion that meaning is not imposed by the artist but rather constructed by the viewer through engagement and interpretation.

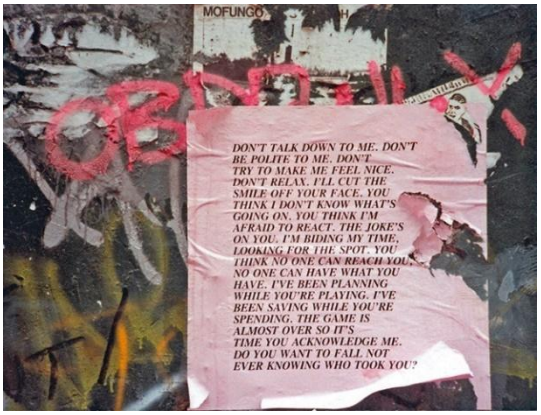

Figure 4. Untitled (Truism) by Jenny Holzer. Source: Schwarz (2019).

Bill Viola's time-based video installations have been exhibited worldwide, resonating deeply with audiences and critics alike. His exploration of themes such as suffering, resurrection, and transcendence is often interpreted through the lens of religious and spiritual symbolism. For instance, Martyrs (Earth, Air, Fire, Water) centers on the human capacity to endure suffering, transcend physical limitations, and achieve spiritual transformation (Feay, 2019). Installed at St Paul's Cathedral in London in 2014, this video installation illustrates the concept of martyrdom as a powerful metaphor for inner strength and sacrifice.

Figure 5 presents a view of Martyrs (Earth, Air, Fire, Water) by Bill Viola, highlighting its evocative visual and thematic elements.

Figure 5. Bill Viola's Martyrs (Earth, Air, Fire,Water) in St Paul's Cathedral. Source: Feay (2019).

According to Uyar (2022), Viola's art has a profound aesthetic and emotional impact. The scholar argues that Viola's work, imbued with deep human value, successfully establishes a connection between thematic content and audience experience. Viola's approach is described as balancing between intimacy and impersonality (del Río, 2022). This balance allows his work to evoke deep emotional

engagement while maintaining a detached, universal perspective. On the one hand, intimacy is evident in the slow pacing of his videos, which invites viewers to connect personally with the human subjects. On the other hand, impersonality arises from using anonymous figures, imbuing his work with a universal quality that prompts viewers to reflect on their feelings and consider inner transformations.

Thus, James Turrell, Jenny Holzer, and Bill Viola perceive experimental art as a crucial means of expanding viewers' perceptions and fostering more profound, unconventional communication between creator and audience. They collectively emphasize that exploring deep emotional and spiritual experiences is most effectively achieved through innovative uses of materials and technologies.

RQ3: What Influences Does the Global Art Community Experience from These Practices?

According to numerous primary and secondary sources, the experimental practices of James Turrell, Jenny Holzer, and Bill Viola have significantly shaped the global art community. This influence is primarily reflected in integrating diverse experimental techniques and using varied materials (Martínez, 2021; Novak-Leonard et al., 2022; Yahaya et al., 2024). Their innovative combinations of installation, digital video, projection, sound art, text-based works, and video art have created complex environments that engage viewers' senses and emotions. Some scholars highlight audience participation as a key instrument for constructing interactive environments where the viewer's physical presence plays an essential role (Droitcour, 2020; Jeon et al., 2019). This active engagement transforms audiences from passive spectators into co-creators, fostering reflection on their own roles within cultural, social, or technological systems.

It was also found that experimental techniques in American art are deeply centered on evoking emotions (Harris & Holman Jones, 2022), positioning artistic works as catalysts for psychological and spiritual responses in viewers. Recent findings indicate that artists working with participatory or immersive installations often construct environments designed to elicit empathy or anxiety (De Benedetto et al., 2024). This emotional engagement transforms artistic creations into powerful tools for audience connection and reflection. Political and social engagement further defines experimental art in the United States (Johnstone & O'Hare, 2023), with artists using unconventional materials and techniques to challenge dominant ideologies, critique governmental systems, and address urgent societal issues. Another notable feature is the transformation of public spaces, where installations and participatory interventions are increasingly used to reimagine streets, buildings, and public places (Chrzanowska-Kluczewska, 2024).

Additionally, scholars argue that experimental art techniques contribute to the global dissemination of new ideas, foster cross-cultural dialogue, and enhance collaboration in the art sphere (Jones et al., 2020). Artists exchange techniques, concepts, and political perspectives across borders, generating hybrid forms of experimental art that reflect both local specificities and global trends.

Figure 5 summarizes the global influences of James Turrell, Jenny Holzer, and Bill Viola, illustrating their contributions to contemporary experimental art.

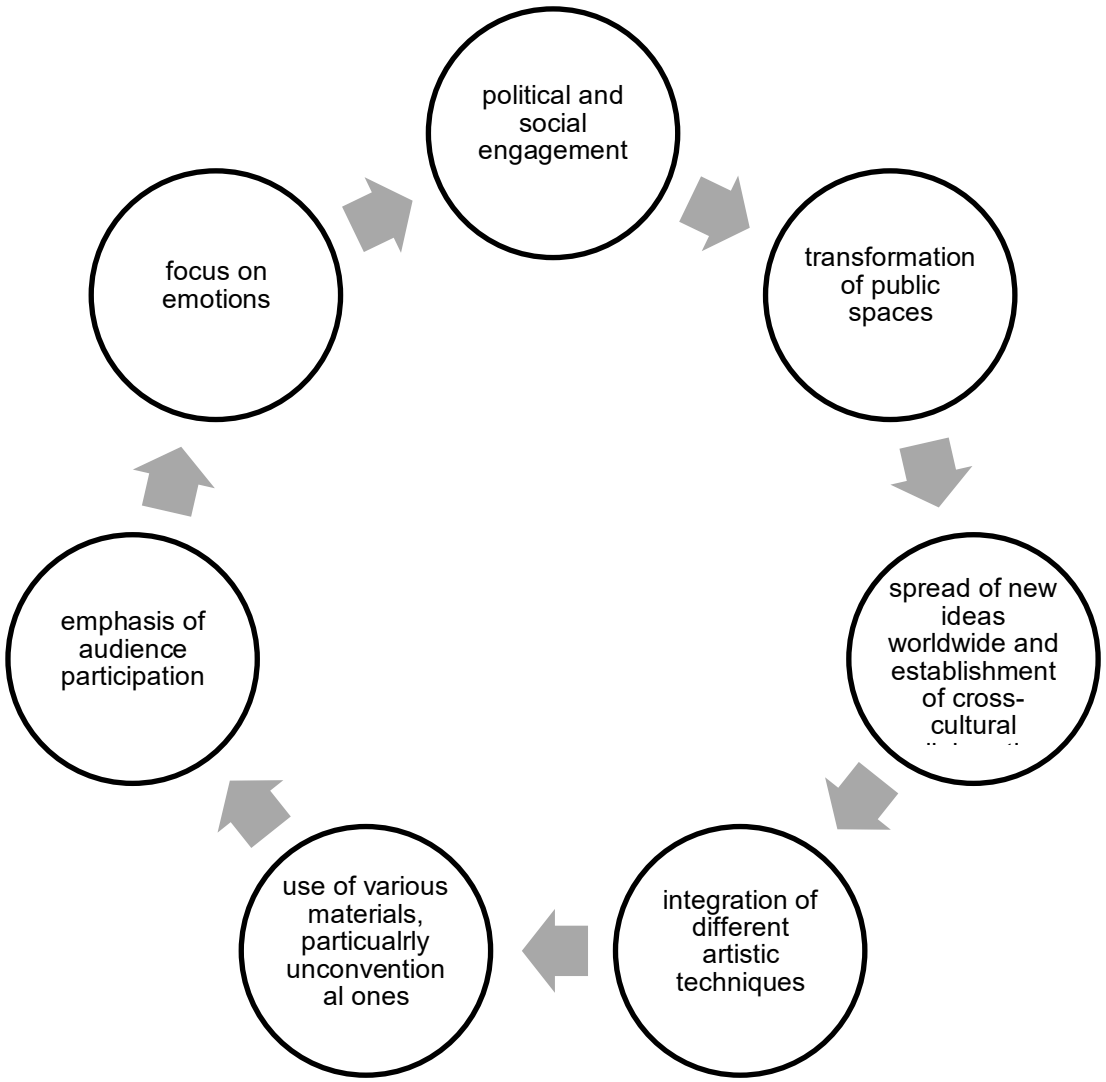

Figure 5. Influences of James Turrell, Jenny Holzer, and Bill Viola upon global community

It is worth noting that the experimental practices of Turrell, Holzer, and Viola have catalyzed the transformation of interdisciplinary styles, audience participation, and emotional engagement in global art contexts. Their work has played a pivotal role in the globalization of contemporary art, promoting cross-cultural exchanges that inspire artists across diverse regions. By reshaping both spaces and viewers'

perceptions, their practices have significantly impacted artistic approaches and audience experiences worldwide. Furthermore, their work's political and social implications underscore how American experimental art fosters the evolution of global practices and redefines the influence of art on audiences.

Discussion

The literature review by Yunlong et al. (2024) underscores that the phenomenological approach centers on subjective experience and perception, focusing on the categories present within the viewer's consciousness. In this context, the application of phenomenology in art shifts from historical and traditional expressions to the immediate understanding of diverse societal phenomena (Gupta & Zieske, 2024). It emphasizes direct experience, facilitating a comprehensive understanding of artworks as lived and sensory projects. This approach often contributes to a holistic interpretation of the symbolism inherent in artistic works. Phenomenology thus proved an effective research tool for studying experimental techniques in contemporary American art. Through this method, the most prominent experimental techniques were identified, and their effects and interpretations were discussed in relation to the works of the selected artists. Moreover, phenomenology enabled an exploration of the global impact of experimental art emerging from the United States.

Firstly, experimental technique in art was characterized as the innovative and unconventional approaches adopted by artists (Avinal, 2024), marked by the use of novel materials (Yahaya et al., 2024), digital tools (Jones et al., 2020), and the integration of different forms and styles (Smith, 2019). Analysis of the works of James Turrell, Jenny Holzer, and Bill Viola revealed prevalent use of light and space manipulation, text-based art, and video art, all intended to evoke deep emotional responses and inspire positive actions. Additional techniques included bioart, interactive and participatory installations, and digital art.

Secondly, American experimental art practices extend beyond mere aesthetics. As MacKay (2022) argues, they reflect dynamics of power and cultural circulation. Many works engage with pressing social and political issues (Johnstone & O'Hare, 2023), created in response to crises or challenges affecting society (Horne, 2020). The use of light, color, video, and text in these works facilitates a reimagining of societal problems and potential solutions. Phenomenological analysis revealed that artists perceive experimental art as a means to explore perception (James Turrell), disrupt traditional communication systems (Jenny Holzer), and cultivate genuine creativity (Bill Viola). The integration of innovative materials—such as light, text, and video—was seen as a way to construct new realities (James Turrell).

A majority of studies emphasize the strong focus on experimentation and interdisciplinarity in American art (Mari, 2024; Yahaya et al., 2024), contributing to the expansion of global artistic practices (Christou, 2023). The findings indicate that experimental techniques have inspired new artistic movements and fostered cross-cultural dialogues (Jones et al., 2020). In comparison, this phenomenological study offered more nuanced insights, confirming that experimental practices have significantly influenced the global art community. This influence is marked by the integration of diverse techniques and materials, audience participation that fosters interactive environments, and a trend toward emotional and psychological engagement. Political and social engagement, alongside the transformation of public spaces, emerged as defining features of experimental art, making it highly recognizable and impactful.

However, the research acknowledges certain limitations. The study's focus on the United States may inadvertently overemphasize Western perspectives and underrepresent experimental practices from other regions. Furthermore, the phenomenological approach inherently involves subjective interpretation and is limited by the selection of a specific set of artists. While these limitations are recognized, they do not detract from the relevance or significance of the study's findings. Instead, they highlight the complexity and richness of investigating experimental artistic practices.

Conclusions

This research found that experimental techniques in art represent innovative and unconventional approaches by artists, encompassing a variety of styles and patterns. The findings revealed that light and space manipulation, text-based art, and video art are actively utilized within contemporary American society. In addition, bioart, interactive and participatory installations, and digital art have emerged as compelling experimental techniques that resonate with audiences. The analysis concluded that American experimental art practices are not merely aesthetic phenomena; rather, they reflect critical political and social issues, inviting responses from viewers. It was established that experimental art serves as a means of exploring perception and as a tool to disrupt traditional communication systems. Moreover, the study highlighted that experimentation constructs new realities through materials such as light, text, and video, contributing to the conceptual and technical innovation of the artistic landscape.

The research also demonstrated the significant global influence of American experimental art, characterized by the integration of diverse techniques and materials, the expansion of audience participation, and the creation of interactive environments that foster emotional engagement. Importantly, experimental practices address

pressing social and political issues, positioning them as potent instruments for challenging governmental structures and fostering positive societal transformation. Furthermore, American experimental art has initiated a global cross-cultural dialogue, promoting artistic exchanges that contribute to the development of international trends while incorporating local specificities.

The findings of this study have implications for advancing scientific and artistic discourse, particularly in evaluating experimental practices rooted in interactivity, digital media, and sensory engagement. The study's insights may encourage cross-cultural innovation in the arts, with strong potential applications in art education and curation. These results suggest a need for integrating interdisciplinary and technology-oriented approaches within academic curricula and museum programming. Such efforts could enhance the ideological role of experimental art and attract wider audience participation.

Future research could explore the expanding role of artificial intelligence and virtual reality in experimental art in the United States, which promises to shape new forms of artistic expression beyond current practices. Special attention should also be given to comparative studies focusing on experimental art in Asia, as these perspectives would reveal diverse forms of artistic innovation and help broaden the predominantly Western narratives of contemporary art.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Traditional and Alternative Healthcare for Hypertension and Diabetes of the Indigenous Peoples (IPs) and Locals from the Upland Areas in Bulacan

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Abstract

This study focused on the views and experiences of the indigenous peoples (IPs) and locals from upland areas in Bulacan on traditional and alternative healthcare for hypertension and diabetes. The study utilized a phenomenological research design and gathered data using key informant interviews and focus group discussions. Participants were selected using the purposive sampling technique. There were 10 medicinal plants identified by the participants that can manage the health risks associated with hypertension and another 17 medicinal plants for diabetes. Some of these plants were native, while others were indigenous to the Philippines. Leaves, barks, roots, and fruits were the parts of the plants being used for medication. The methods used in the extraction of its curative effect were decoction, infusion, and candying/chewing. Regarding the narrative on their potency, participants claimed that they were effective and were a big factor in improving their health conditions. It is recommended that all identified species of medicinal plants be subjected to clinical studies to test scientifically if they could be used as an alternative antihypertensive and antidiabetic drug.

Keywords: *alternative healthcare, diabetes mellitus, hypertensive diseases, indigenous peoples, medicinal plants, potency.*

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Introduction

Two of the many leading causes of mortality and swelling healthcare expenditures annually in the Philippines are hypertensive diseases and diabetes mellitus. In fact, from the records of the Philippine Statistics Authority (2019) in 2017, it was noted that out of 579, 237 reported deaths, 5.3 % were cases related to diabetes mellitus, while 4.6% were directly associated with hypertensive diseases. This is not to mention that there were 6.3 million Filipinos in 2008 diagnosed with diabetes (Philippine Journal of Internal Medicine as cited in Dizon, 2019) and another 12 million Filipinos who were suffering from hypertensive diseases based on the latest survey results of the Department of Health [DOH] conducted in 2017 (as cited in Orillo, 2018). Despite the serious threat these diseases pose to the lives of the people, access to treatment and medication remains to be a challenge. This is particularly true among Filipinos who are living below the poverty threshold. As a matter of fact, 48% of the population survives a day by just spending around US $2 (Wagner et al., 2008). How can this amount be enough to feed and simultaneously provide medication to a family with an average number of 4.4 members (Philippine Statistics Authority, 2016)?

To address this health concern, the government launched the DOH Hypertension and Diabetes Club in 2016 (Development Academy of the Philippines [DAP], 2021). This support group was created to assist in disseminating pertinent information, as well as to provide medication that will help in managing the health risks associated with hypertension and diabetes among patient members.

However, as of 2017, only 600,000 registered members were in the said support group (DOH- Calabarzon Center for Health Development, 2019). This figure is quite small compared to the number of people who are already suffering from the debilitating effects of these life-threatening diseases. Along with this dilemma, drugs that are necessary for its management are costly. This has been proven by the effort of the government to regulate the price of about 120 drugs in the country, which address the leading causes of death of millions of Filipinos every year --and these include medicines for hypertension and diabetes (DOH, 2019). Thus, accessibility to medications and treatments related to hypertensive and diabetic diseases remains a national concern for the Philippine government despite its previous initiatives and measures to combat these health problems.

In line with this, it was observed by UNESCO (as cited in Manoharachary & Nagaraju, 2016) that there is a growing interest in medicinal plants as a health aid or personal health maintenance for heart diseases, diabetes, high blood pressure, and even certain types of cancer in developing countries (Abdel- Aziz, Aeron, & Kahil, 2016). This is not surprising because medicinal plants were used to alleviate pain and

cure diseases as early as the dawn of human civilization. In fact, to date, around 30,000 species of plants have been discovered worldwide with great value or importance, of which 15,000 have been identified with medicinal use or potential (Manoharachary & Nagaraju, 2016). In the Philippines, however, local knowledge and the use of medicinal plants are almost lost in the consciousness of common people. People now depend on drugstores for their medicines.

With its abundant natural resources and rich biodiversity, the Philippines can be a potential source of medicinal plants with pharmacological properties that can be extracted to produce cheaper herbal drugs for hypertensive and diabetic diseases. This, in a way, could ease the burden of the government in providing more accessible medical treatment to the economically challenged sectors of the society and could possibly reduce a significant number of people dying yearly from these health conditions.

It is in this light that this study was undertaken. Moreover, it was observed in the literature that despite the widespread distribution of various drugs globally and their claimed curative effects, there were few to none in terms of studies conducted to formally assess their pharmacological qualities and the risks associated with using them (Abdel-Aziz et al., 2016; Firenzouli & Gori, 2007). This gap in research will hopefully be addressed in the second phase of its implementation. This has also been proposed in cognizance of Republic Act 8423, otherwise known as the Traditional and Alternative Medicine Act (TAMA) of 1997, which "encourages scientific research on and develop traditional and alternative health care systems that have a direct impact on public health care."

It must be noted that existing studies have failed to look into the way people see and experience diabetes and hypertension, as they are too focused on the identification of medicinal plants that will address these medical conditions (Diop et al., 2022; Karou et al., 2011; David & Johnson, 2016; Insaf et al., 2023; Okigbo, Anuagasi, & Nnoli, 2019; Fiscal & Carino-Chavez, 2016; Zhang et al., 2022). However, studies, as perceived by researchers, suggest that traditional healthcare knowledge extends beyond the use of medicinal plants. It involves understanding the illness's nature, its causes, and other associated beliefs. This comprehensive perspective is crucial for developing primary healthcare programs that are both suitable and acceptable to local communities (Marecik, 2007; Keleher, 2001; Von Wolputte & Devisch).

Presently, challenges and severe threats exist to preserving traditional/indigenous/local knowledge. Traditional / Indigenous / local knowledge refers to knowledge systems rooted in cultural traditions, beliefs, and practices of Indigenous, regional, and local communities, such as ethnobotany and

ecological knowledge, traditional medicine, craft skills, celestial navigation, traditional technologies of subsistence, ethnoastronomy and others (Sullivan, 2016). This knowledge is crucial for survival and subsistence and was accumulated through observations and close contact with the environment by locals/indigenous peoples.

Some of the threats identified relative to its preservation are the following: the "loss of the indigenous peoples' territorial base through the destruction of the rainforests, and their displacement by government projects or through commercial utilization of natural resources. This makes it impossible for many indigenous communities to sustain their knowledge. Second is the introduction of the so-called "modern" practices of agriculture and medicine. Lastly, outside researchers' misappropriation of indigenous knowledge leads to extinction (La Vina as cited in Daos, 1999, p. 5)." Unfortunately, as we have experienced, its misappropriation has led to the demonization and underestimation of its value and scientific credibility.

In response to these challenges, international and local agencies and organizations took the initiative to protect traditional/indigenous/local knowledge through (1) promotion of community documentation of indigenous knowledge systems and practices (IKSPs) and (2) giving of support in the establishment of community resource centers (Daoas,1999). Hence, this undertaking also supports these measures to secure the preservation of local cultural heritage.

The study was anchored on the Urbanization and Knowledge Loss Hypothesis and on the work of Patel (1995). The former states that urbanization negatively affects the retention and preservation of traditional or local ecological knowledge, while the latter advances the idea that primary healthcare can be enhanced significantly by understanding the worldviews and experiences of people from a particular culture on categories of disease (Gaoue et al., 2017, pp. 8–9).

This study focused on the views and experiences of the indigenous peoples and locals from upland areas in Bulacan on traditional and alternative healthcare for hypertension and diabetes. In particular, it aimed to (1) enumerate their beliefs associated with hypertension and diabetes; (2) identify medicinal plants and traditional practices used by the indigenous peoples (IPs) and locals in managing their hypertension and diabetes; (3) document the manner/s on how the IPs and locals prepared the medicinal plants to bring out their curative effects; and (4) record narratives regarding their potency.

Related Literature

Non-communicable diseases contribute to the rising number of public health issues around the world that add to premature and preventable deaths, particularly

hypertension and diabetes, which continue to be the top causes of death in the Philippines (Lim et al., 2021). The statement coincides with the data of the Philippine Statistics Authority (2023), where diabetes mellitus and hypertension rank as fourth and fifth, respectively, among the top diseases that cause death among Filipinos. According to Armstrong (2014), hypertension refers to a blood pressure that is higher than or equal to 140/90 for people under 60 and 150/90 for people over 60. Due to the lack of symptoms or warning indications, it is referred to as the "silent killer," thus preventing many people from realizing that they have hypertension. On the other hand, diabetes is defined by the World Health Organization [WHO] (2023) as a chronic and metabolic disease characterized by elevated levels of blood glucose (or blood sugar), which leads over time to serious damage to the heart, blood vessels, eyes, kidneys, and nerves. With this, the burden of diabetes and hypertension, with their accompanying risk factors and complications, is upon the Filipinos, as Asia, where the Philippines is located, owes this to huge population numbers and increasing prevalence rates, mostly influenced by heredity and lifestyle (WHO, 2023).

In response to these, the Philippine government has implemented and established various programs and initiatives to help diabetic and hypertensive people. These programs aim to improve access to affordable healthcare, promote healthy lifestyles, and provide support to individuals living with these conditions. For instance, the Department of Health (DOH) established the Hypertension and Diabetes Club in 2016. This nationwide program aims to treat individuals with diabetes and hypertension by providing patients with access to free maintenance drugs for diabetes, high blood pressure, and high cholesterol to prevent and control the complications of these non-communicable diseases (DAP, 2021). Another initiative program of the Department of Health (DOH) in cooperation with the World Health Organization (WHO) is the "Healthy Hearts Program," which is designed to improve cardiovascular health and reduce mortality caused by NCDs (non-communicable diseases), including hypertension and diabetes. The program aims to train barangay health workers to perform simple blood pressure readings and encourage the community to have a healthy lifestyle (Junio, 2023).

Despite these efforts, diabetes and hypertension care in the Philippines still has a long way to go, as there are many challenges in addressing them in terms of resources, government support, and other related factors (Tan, 2015; Sison et al., 2020). For instance, the national insurance system does not cover comprehensive diabetes care in a preventive model, giving only P15,800 for diabetes mellitus with coma or ketosis cases. In terms of hypertension, only P 9,000 is given for confinements at accredited hospitals (Philippine Health Insurance Corporation, 2019; Jaymalin, 2023).

Thus, most patients rely on "out-of-pocket" expenses, namely, laboratory procedures and daily medications. The study conducted by Mendoza et al. (2022) found that most of the primary care and medication for hypertension and diabetes are still provided in clinics and hospitals. Thereby, visiting health centers may not be convenient for everyone due to other priorities. This also shows that even with advancements in the healthcare field, not all can access proper care and medications.

With these challenges present, many Filipinos resort to traditional medicine. The World Health Organization (WHO) defines traditional medicine as the sum total of the knowledge, skills, and practices based on the theories, beliefs, and experiences indigenous to different cultures, whether explicable or not, used in the maintenance of health as well as in the prevention, diagnosis, improvement or treatment of physical and mental illness (WHO, 2011). Most people use such medicines because they believe they are culturally acceptable, less dangerous, and more natural than conventional ones. Accessibility, availability, and affordability also contribute to why people prefer this kind of medicine.

One of the advocates of the use of herbal medicine in the Philippines is the former Secretary of Health and Senator Dr. Juan Flavier. Long before he became a senator, he was known as the "doctor to the barrios" in Nueva Ecija and Cavite. At this time, he became exposed to the use of herbal/ alternative medicine. During Ramos' administration as DOH Secretary, he encouraged people to use traditional and alternative medicines. Under his leadership, DOH adopted ten medical plants that were thoroughly tested as legitimate medicines and had been clinically proven to have medicinal value (Guererro, 2016). This eventually led to the passage of Republic Act 8423, otherwise known as "The Traditional and Alternative Medicine Act of 1997". Its main goal is to improve the quality and delivery of healthcare services to the Filipino people through the development of traditional alternative healthcare and its integration into the national healthcare delivery system. This underscores the importance of using herbal medicines as an alternative form of treatment and emphasizes the effectiveness of their medicinal properties.

Methodology

The study utilized a phenomenological research design and gathered data using key informant interviews (KII) and focus group discussions (FGD). In phenomenological research, judgment on the natural world is suspended to place more emphasis on people's experiences of a phenomenon (Duquesne University, 2023, para.1).

This study focused on the province of Bulacan, located in Central Luzon, which has been identified as one of the regions in the country with the highest mortality rates due to hypertension and diabetes mellitus. Bulacan is bordered by Nueva Ecija to the north, Aurora to the northeast, General Nakar to the east, Rizal to the southeast, Metro Manila to the south, Manila Bay to the southwest, and Pampanga to the west. Encompassing a total land area of 279,610 hectares, Bulacan comprises four cities and twenty municipalities (Provincial Government of Bulacan, 2022, "Bulacan Province" Section). This study particularly focused on five highland municipalities—San Miguel, San Rafael, San Ildefonso, Norzagaray, and Angat—which are known for their rich biodiversity and are home to Indigenous communities, including the Dumagat. These areas contain barangays and remote communities where residents continue to practice alternative healthcare methods, including the use of medicinal plants, to manage hypertension and diabetes.

The selection of participants followed a purposive sampling approach, ensuring that only individuals meeting specific criteria were included. The inclusion criteria were as follows: (1) residents of upland rural areas in Bulacan; (2) identified as indigenous peoples, herbolarios (traditional healers), faith healers, or older members of the community; (3) aged between 45 and 64 years; and (4) with direct experience in using medicinal plants to manage hypertension and diabetes. In each barangay, two participants were selected for key informant interviews (KII), while a group of six participants was organized for focus group discussions (FGD). The study covered a total of 10 barangays across the five selected municipalities.

Data collection was conducted through multiple methods, including narrative interviews, field notes, photographs, transcriptions of KII and FGD sessions, and the culturally grounded practice of *pakuwento-kuwento*—a Filipino storytelling approach wherein the researcher listens to participants' personal experiences related to the phenomenon under study. Observations of non-verbal cues such as gestures, body language, and eye contact were also made to assess participants' sincerity and authenticity during interviews.

To analyze the collected data, thematic analysis was employed, focusing on identifying recurring patterns and themes within the qualitative data (Braun & Clarke, 2006). This method acknowledges the reflexive role of the researcher, whose subjective experience and interpretive lens are crucial in making sense of the data. Through this iterative and reflective process, the study was able to capture the nuanced perspectives of Indigenous and local communities regarding the use of alternative healthcare practices for hypertension and diabetes in upland Bulacan.

The researchers coordinated the project with the concerned authorities in their research locale after receiving the consent of the university's Research Ethics Committee. The authorities considered in the study include the municipality's mayor, the barangays' chairpersons, and the Indigenous Peoples Mandatory Representative (IPMR). Gatekeepers were then identified and focus group discussions and interviews were scheduled. During the data gathering period, the researchers provided informed consent to the participants to ensure that they were aware of the study's purpose, the nature and extent of their participation, and their rights and benefits as participants in the study. Upon completion of the initial draft of the research manuscript, the researchers returned to the field sites to determine if the conclusions they reached about the study were consistent in any way with the perspectives and understandings of the participants. The anonymity of the participants' identity, the privacy of their data, and several pertinent IPRA provisions were all considered during the study to safeguard the participants' rights and welfare. Goods were given to all participants after their participation, and tokens were developed as tokens for an extension program relevant to the needs of the community.

Results and Discussion

Beliefs Associated with Hypertension and Diabetes

Participants strongly believed that diabetes and hypertension were both a kind of sakit (roughly translated as illness). Sakit as described by participants was fatalistic ("delikadao kapag lumalala"; "talagang ikinamamatay"), non-curable but manageable ("gagaling siya, babalik"), specifically in the case of hypertension and diabetes, and characterized by feebleness ("matamlay"; "nanlalambot"), fever ("nilalagnat"), teary eyes with frequent yawning ("lumuluhang mata"; hikab nang hikab), and unpleasant feeling ("masama ang pakiramdam"; "hindi maayos ang katawan"). All of these descriptions were manifestations of either poor health or severe medical conditions. So, in this particular context, it indicates that it is not just a feeling of pain brought about by an aberration of the normal function of a specific body part, such as headache and stomach ache, but rather a general physical condition that affects the well-being of a person (De Castro & Alvarez, 2003) or what Tan (2008) described as a state of experiencing a serious physical condition that may affect or threaten the normal functioning of a person (may sakit).

As sakit, hypertension and diabetes have various symptoms or manifestations as expressed by the participants. Hypertensive participants often claimed that they experienced dizziness ("naliliyo"; "nahihilo"), feebleness ("nanlalata"), nape pain ("masakit yung batok"), chest pain and palpitation ("naninikip ang dibdib at

kumakabog"), body immobility ("hindi ako makabangon"), extreme body heat (ïnit na init ka"), heavy feeling ("mabigat yung pakiramdam"), and numbness ("parang namamanhid"), whenever their blood pressure is getting high. Contrary to some medical findings, it typically exhibits no warning signs or symptoms (Centers for Diseases Control and Prevention, 2021, para. 14; American Heart Association, 2023, para. 1). Such were the medical conditions identified by most of the participants when they were hypertensive. This may be attributed to their experiences, which have already escalated to the level of hypertensive emergency crisis, with blood pressure higher than 180/120 mm Hg, as described by the American College of Cardiology and the American Heart Association (as cited in Mayo Foundation for Medical Education and Research (MFMER), 2022, para 4). It was assumed because the symptoms mentioned by the participants coincided with the descriptions provided by the World Health Organization (2023) with people with blood pressure higher than 180/120 mm Hg, like severe headache, chest pain, dizziness, difficulty in breathing, nausea, vomiting, blurred vision or other vision changes, anxiety, confusion, buzzing in the ears, nosebleeds, and abnormal heart rhythm (para.11).

On the other hand, those diabetic participants averred that they often suffered from blurry vision ("lumalabo yung paningin"), dizziness (nahihilo), trembling and absent-mindedness ("naginginig buong katawan tapos nabablangko"), numbness ("namamanhid"), itchiness ("nangangati"), more frequent urination ("madalas umihi"), feebleness ("nanlalata"), prolonged wound recovery ("matagal gumaling"), and vomiting ("nagsusuka"), whenever their blood sugar level increases. Although they are aware of its symptoms, they cannot categorically identify whether it is Type 1 or Type 2 diabetes. In spite of that, the researchers would like to believe that it was Type 2 diabetes because most of the symptoms enumerated by participants coincided with the medical conditions of people with Type 2 diabetes as expressed by medical experts, such as increased thirst, frequent urination, increased hunger, fatigue, blurred vision, slow-healing sores, frequent infections, numbness or tingling in the hands or feet, areas of darkened skin, usually in the armpits and neck, and having very dry skin. (Mayo Foundation for Medical Education and Research (MFMER), 2023, para. 5; Osborn, 2022, para. 21; Poulson, 2023, para. 9; Sracocic, 2022, para. 6; American Diabetes Association, 2023, para. 2). On top of that, most of the participants were people who acquired the said medical condition at the age of 45 and above, a stage of life where Type 2 diabetes is more prevalent. This is not to mention that in the Philippines, according to Dr. Michael Villa (as cited in Cudis, 2021), President of the Philippine Society of Endocrinology, Diabetes, and Metabolism," Type 2 diabetes makes up about 85 percent of patients with diabetes" (para. 10).

As to the causes of these medical conditions, financial instability ("walang pera"), psycho-emotional factors ("galit lagi"; "palaging stress"), exhaustion ("napapagod po"), unhealthy diet ("sa kinakain na rin po), extreme heat ("sobrang init"), lack of exercise ("bihira ako mag-ehersisyo"), lack of sleep ("hindi nakakatulog"), and genetic susceptibility ("lahi po namin"), were pinned down for hypertension while unhealthy diet ("matatamis na pagkain;" "malakas sa de bote"), and genetic susceptibility (namamana) for diabetes. The perceptions and knowledge of the participants on the possible causes of these health issues have sound and medical bases (Edwards, 2022, para.5; Cleveland Clinic, 2023, para. 16; Merino et al., 2022; Lopez-Jimenez, 2022, para. 2) as they were acquired from consultation with healthcare professionals, experts' opinion from social media, and experiences of those who have these medical conditions for a long time. This was supported by the study of Szymona-Pałkowska et al. (2016), which states that "patients derive the knowledge of their disease from various sources, for example, information from physicians or other health care professionals, using other sufferers' opinions, information available in mass media, scientific journals, or the internet forums" ("Discussion" Section, para. 1). One may also notice from the list of causes of hypertension that financial instability was included. Although it appeared to be unrelated, it is one of the top causes of stress, which is a factor that contributes to high blood pressure. According to Unilab, Inc. (2019), "high levels of stress can also considerably raise the risk of getting hypertension" (para. 2).

It is quite noticeable that participants view hypertension and diabetes as serious illnesses requiring early medical attention to prevent complications and potentially life-threatening risks.

Traditional Practices and Medicinal Plants Being Used for Managing Hypertension and Diabetes

Practices in Treating Hypertension and Diabetes

Both hypertension and diabetes require careful and lifetime management. Listed below are the practices to treat hypertension and diabetes, namely: healthy diet, exercise, body moisturization, taking synthetic drugs, and the use of herbal medicines.

Healthy Diet. Maintaining a healthy diet is essential for the control of hypertension. By decreasing blood pressure and reducing the risk of heart disease and stroke, among other things, it serves to enhance overall health. As stated by one of the informants, "I was advised to take a diet, and I was made to stay away from foods I was eating." Another is, "No, I don't eat what needs to be avoided." Berman (2023)

claimed that changing one's diet is a tried-and-true method for lowering blood pressure.

In terms of diabetes, the most obvious way to manage blood sugar levels is to lessen the number of sweets in their diet; as one respondent stated, "avoiding sweets and soft drinks" is key to maintaining normal blood sugar levels. Sugar-filled foods and beverages have been shown to have a negative impact on diabetics' health (Gonzales et al., 2021). With this, less sugary food consumption is strongly advised to augment diabetes treatment and prevention.

Exercise. The advantages of exercise for those with diabetes and hypertension are immeasurable (Harvard Health Publishing, 2023). Exercise improves blood pressure, raises good cholesterol, lowers dangerous cholesterol and triglycerides, strengthens bones and muscles, eases anxiety, and helps maintain a healthy weight. As expressed by the informants, "I'm excreting sweat," and "I do exercise, like walking." The effectiveness of exercise on hypertension is well supported by research, which contends that exercise lowers blood pressure and halts the onset and progression of hypertension (Gambardella et al., 2020). Similarly, blood sugar levels have been found to be lowered in diabetics who walk for at least two hours a week, engage in weight training, and/or perform aerobic activity (Harvard Health Publishing, 2023).

Body Moisturization. Most informants believed that body moisturization eases their high blood pressure symptoms and helps them relax. As stated by one of the respondents, "I'm wetting my mouth because I'm shaking.", Others reacted, "I'm pouring water on my feet," Still, others specifically described the procedure, "Get a dipper, fill it with water then get a towel, squeeze it, then put it on your forehead." Body moisturization or just taking a bath can lower blood pressure because it relaxes the muscles, resulting in less blood and pressure in the body, which results in lower blood pressure. This improves heart and blood vessel function (Healthy Hildegard, 2020).

Taking Synthetic Drugs. Synthetic drugs and natural remedies stand out among the treatment choices for treating hypertension and diabetes. Most of the informants still believe in technological advancements in the field of medicine. However, they are also concerned about the side effects of what synthetic drugs can do to their body. Modern, synthetic medications may help people, but they can also have unfavorable side effects that bring harm to patients (Subudhi, 2023). Some of the adverse effects could be headaches, nausea, rashes, dizziness, and difficulty in breathing. While the side effects may be mild or temporary, it still can impact the patients. As a result, they resort to natural medications such as herbal medicines. As

one of them said, “I take only mild medication, like lozartan.” Another is, “The doctor prescribed me to take metformin, but I experienced stomachache, so I resorted to herbal medicine.” This shows that using herbal medications benefits its users; nevertheless, it should be mentioned that not all herbal medicines are safe to use because they lack quality control and proper labeling, and they do not include the appropriate patient information, according to the users (Raynor, 2011).

Use of Herbal Medicines. Despite technological advancements in the field of medicine, Filipinos still patronize herbal medicines. Prior to European conquest, Filipinos had a defined medical tradition with a holistic perspective comparable to Southeast Asian medical traditions. It encompassed not only the physical but also the psychological and spiritual aspects of existence, implying that a shared cultural foundation existed among them prior to the conquest (Planta, 2017). In modern times, the use of herbal medicine is included in the broad category of complementary and alternative medicine used as a kind of alternative treatment. Herbal medicines are often used as a cure for diabetes as many people believe that their bitterness has healing properties. As the saying goes, “Bitter taste, better cure.” The effect of bitter flavor is attributed to glucose regulation by improving the sugar level. It also decreases insulin resistance (Chen et al., 2015). In connection with the statements of the informants, “Since my parents are drinking herbal, when I found out that I have diabetes, they told me to drink herbal medicines.” Another is, “We use blue ternate and serpentina.” As for some, boiling and drinking the extract of the leaves can be of help, “For me, I only drink guyabano leaf and guava leaves.” Another claimed, "When my blood sugar spiked, I ate the leaf of a plant named insulin plant.” Diabetes is associated with sugar; therefore, a bitter taste is needed to counter the excess sugar and maintain the balance inside the body. In addition to this explanation, there is a widespread belief that the bitter taste coming from medicinal plants is the very substance needed and expected to kill the deadly microbes causing harm to the human body; this is more evident, for instance, in traditional Chinese medicine (TCM), where a bitter pill or elixir is combined with other medical practices like moxibustion, acupuncture, and tai chi, expecting it to bring miraculous healing to the sick (Glendenning, 1994; Matos et al., 2021).

On the other hand, in terms of hypertension, informants stated that they drink herbal medicines such as pandang lalaki, dahon ng guyabano, tanglad, serpentina, kalamunding, and sambong, whenever they think or feel they have high blood pressure or to maintain normal blood pressure. They contend that herbal remedies are typically thought to be safer than prescription medicines and to have less side effects than ingesting synthetic drugs. In connection with the study of Willcox et al. (2021),

herbal medicines are often used for remedies and are tested effective and safe. Also, many of these herbals consist of herbs and spices with properties that are common food products and, as such, are generally considered safe.

Medicinal Plants Used to Treat Hypertension and Diabetes

Table 1. Medicinal Plants

Scientific Name	Medicinal Plants	Part/s of Medicinal Plant being used for medication	Treatment
Annona muricata	Guyabano	Bark, Fruit Skin, Leaves	Diabetes
Misosa pudica	Makahiya	Leaves	Diabetes
Chrysophyllum cainito	Caimito	Leaves, Fruit Skin	Diabetes
Persea americana	Avocado	Leaves	Diabetes
Cymbopogon citratus	Tanglad	Leaves	Diabetes, Hypertension
Psidium guajava	Guava	Leaves	Diabetes, Hypertension
Pandanus amaryllifolius	Pandang Lalaki	Leaves	Diabetes
Blumea balsamifera	Sambong	Leaves	Diabetes, Hypertension
Eleusine indica	Paragis/Bakiskisan	Leaves	Diabetes
Curcuma longa	Luyang dilaw	Fruit	Diabetes
Lagerstroemia speciosa	Banaba	Leaves	Diabetes
Mangifera indica	Mangga	Leaves	Diabetes
Clitoria ternatea	Blue Ternate	Flower	Diabetes
Abelmoschus esculentus	Okra	Vegetable	Diabetes
Costus igneus	Insulin Plant	Leaves	Diabetes
Rauvolfia serpentina	Serpentina	Leaves	Diabetes, Hypertension
Orthosiphon stamineus	Taheebo	Leaves	Hypertension
Moringa oleifera	Malunggay	Leaves	Hypertension
Euphorbia hirta	Tawa-tawa	Leaves	Hypertension
Angelica keiskei	Ashitaba	Leaves	Hypertension
Peperomia pellucida	Pansit-pansitan	Whole plant (washed)	Hypertension
Citrus microcarpa	Kalamunding	Juice of the fruit	Hypertension

The popularity of herbal medicines has surged globally, with their use in healthcare settings increasing rapidly. These natural medicines are now found in pharmacies, grocery stores, and supermarkets. In underdeveloped countries, up to four billion people rely on herbal medicines for healthcare, and some communities consider their use as an essential part of their culture (World Health Organization, 2004). In the Philippines, the use of herbal medicines can be traced back long before the arrival of the colonizers. Spanish friars, in their chronicles, witnessed the healing practices and rituals performed by the herbolarios, the term from which the word "albularyo" originated, since they used herbs in healing the sick. These herbs can either be consumed orally or externally (tapal or pahid). However, Planta (2017) discussed that traditional medicine in the Philippines does not refer to a single medical system alone. The Indians and the Chinese contributed their medical traditions through trade. As a result, a plurality of medical systems is used in the country, which is a product of a long process of Filipino ways of healing illnesses.

Numerous herbal medicines have been investigated for their potential to assist diabetics in managing their blood sugar levels and people with hypertension in managing their blood pressure level. For instance, guyabano and malunggay both hold high quantities of vitamins A, B, C, E, and K, which help balance salt and appropriate fluid balance in the body. This then leads to a boost in the immune system that can help control blood sugar and blood pressure. Another is makahiya and sambong, which have diuretic properties that reduce diabetes levels like the majority of blood sugar medicines, while others also use it for lowering blood pressure through consuming the juice of its leaves. As for caimito and guava are used to lower blood sugar and blood pressure due to its potassium content. Meanwhile, avocados are rich in oleic acid, which can help lower cholesterol and blood sugar. Moreover, tanglad, pandang lalaki, bakiskisan (also called paragis), luyang dilaw, banaba, pansit-pansitan, sambong, taheebo, malunggay, tawa-tawa, guava, ashitaba, and kalamunding all have antioxidant, antimicrobial, and anti-inflammatory properties that help in reducing bad cholesterol, regulating blood pressure and level of blood sugar. As for the mangga, or mangoes, they contain mangiferin, a compound that is said to have blood sugar-lowering effects. There is also the blue ternate, whose flower is used in traditional medicine to treat a wide range of illnesses, including diabetes. Lastly, the insulin plant and serpentina that contain compounds such as costunolide, stigmasterol, and quercetin have been shown to have hypoglycemic effects that help in lowering blood sugar levels.

The majority of the herbal plants stated are not endemic in the Philippines. Some of them came from Central, West, and South America, East, West, and Southern

Asia. In the Philippines, most of the herbal medicines are found within the respondents' vicinity, hence their familiarity with the plants. Also, due to its accessibility, affordability, and availability, the people maximize the "gift" of nature in dealing with their illnesses. In relation with Petrovska's study (2012), it was mentioned that familiarity with the plants contributed to the number of people using herbal medicine. Most of the time, knowledge about the medicinal properties of a certain plant comes from the elders, friends, and neighbors in the community who are also experiencing the same symptoms and disease. As for the usage of herbal plants, some methods include the whole herb while others are just a portion or part of a plant like the stem, the roots, and the leaves. The leaf is the most widely used part of the plant for cure for its solubility and digestibility.

Extraction of the Medicinal Plants' Curative Effect and the Narratives of Their Potency

It can be gleaned from the data that across all barangays the most common ways of extracting the curative effect of the medicinal plants for diabetes and hypertension are through decoction, steeping, and chewing. The participants consistently say that most of them resort to decoction, as noted in their statements, such as "I'm just brewing the leaves of the herbal plants "or "I boil it for a few minutes." Decoction, as defined by Bitwell et al. (2023), is a method of extracting chemicals by boiling herbs or plant material, including stems, roots, bark, and rhizomes. Steeping is another method that they use in the preparation of herbal medicines. In relation to this, many participants said that "I just soak it in water." As a process, steeping extracts the flavor and health-promoting chemicals from the material used to produce tea through the soaking of leaves in a liquid or water, either hot or cold (Danahy, 2020). Finally, some resort to chewing to extract the medicinal plant's therapeutic effects, as evidenced by expressions such as "I make it like candy, I chew it directly." Chewing, as described by Watanabe (2014), is a process by which an herbal plant is crushed and mashed by the teeth in order for enzymes to break it down more efficiently. Obviously, medicinal plants are used internally, whether the active ingredient is extracted through decoction, steeping, or chewing.

Participants added that they had mixed two or more medicinal plants to create more effective herbal medicines. This assertion of the participants was confirmed in the study by Sofowora et al. (2013), which stated that some plants were administered in combination with other plants to increase the effectiveness of herbal medication (p.84). In most instances, it was observed from the participants' narratives that the usual number of medicinal plants that they use to combine to ensure their efficacy is seven. This practice may be associated with the Filipino belief that this number brings

fortune and prosperity. This Filipino worldview, in turn, can be attributed to the influence of either the Chinese, particularly Confucianism and Taosim religious-philosophical traditions, or Hebrew cultures, which believed that the number "seven" was a sign of "balance", "harmony", "completeness", and "wholeness" (Liu & Ann, 2021; Farbridge, 1923) This perhaps will explain why most of the participants used to combine seven medicinal plants in preparing their herbal medicines. Clearly, the medicinal plants in this study were utilized as curative medicines, that is, as a tool to cure an existing illness in the body.

Regarding the amount or frequency of use of medicinal plants, the data revealed that it varies and becomes a matter of choice and preference for the participants. Some said, "I drink it when I don't feel well," while others said they take it "when they are thirsty". Others mentioned "once a night," "three glasses per day," "two glasses during the day," and "six glasses a day". Notable among the responses is the fact that participants only resort to drinking herbal medicine whenever they start to feel unwell and stop the moment, they feel better. Some use it as an alternative medicine due to a lack of money to buy over-the-counter prescription drugs, while others use it alternately with synthetic drugs. A few have already acquired the habit of taking herbal medicine on a regular basis, much like tea, to maintain their health. These variations in dosage when using medicinal plants may be attributed to their unique nature, which makes giving an exact measure or dose of their active ingredients difficult; thus, the approach to giving dosage regarding their use varies from country to country or within the country. From here, we can deduce the belief that the efficacy of medicinal plants can be obtained over a wide range of doses (Benzie & Wachtel-Galor, 2011).

All participants claimed they felt better after drinking the herbal medicine. They attributed the relief they felt to the consumption and ingestion of the herbal medicine that they prepared. As they said, their blood pressure and sugar levels both went back to normal, and all of their symptoms were gone through it. In relation to this, evidence of medicinal plant effectiveness was relatively limited. However, studies were saying that if they were used correctly, they could be of help in disease prevention, treating various medical conditions, and even in the production of plant-based medicines (Sofowora et al., 2013; Icahn School of Medicine at Mount Sinai, 2023).

Conclusions and Recommendations

Participants believed that diabetes and hypertension are conditions that need to be taken seriously in order to avoid their life-threatening complications. If they are correctly handled and addressed as their symptoms worsen, their crippling effect can

be minimized. They used a variety of strategies to treat these illnesses, including regular exercise, eating a balanced diet, and moisturizing the skin to regulate body temperature. These were simultaneously put into practice with the use of medicinal plants. The medicinal plants used were either non-native or indigenous to the Philippines. They abound in the place and are so accessible to the participants that they can even be found in their backyard and on the sides of the public walkways and highways. The part of the plant used the most for medicine is the leaf.

It was either chewed, decocted, or steeped to obtain its medicinal effect. Medical professionals, social media influencers, parents, neighbors, and friends were the most common sources of information concerning this. Participants discussed the Medicinals' potency, saying they would recommend them to others because they significantly improved their health conditions. In addition, they believed that the efficacy of medicinal plants can be attained at a wide range of doses. It is recommended that future research focus on investigating whether the medicinal plants in the study, through biochemical analysis and clinical testing, can be used to develop anti-hypertensive and diabetic drugs. Parallel to this, a proposal to build a greenhouse nursery for propagating the identified medicinal plants will be crucial for conducting the clinical trials.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Superwoman in the Security Field: Exploring the Lived Experiences of Female Security Guards

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Abstract

The study investigates the lived experiences and challenges of female security guards in Bulacan, highlighting their significant role in the security sector and the broader context of gender equality. Through in-depth interviews with fifteen female security guards, the research reveals key themes such as the considerable personal sacrifices made by these women, many of whom are single mothers, who navigate demanding 12-hour shifts while striving to maintain family connections. Despite their essential contributions, findings indicate they often receive minimum wage, may lack awareness of available benefits like hazard pay, and prioritize timely salary payments. The study also documents persistent discrimination from clients and colleagues, which can undermine their recognized value in providing empathy and a nuanced understanding of security. The research advocates for implementing targeted support systems and inclusive policies aimed at enhancing workplace conditions, ensuring fair compensation, and fostering greater recognition of the unique contributions of female security guards. The study underscores the potential to empower these women by addressing these issues, thereby contributing to community stability and promoting gender equality in the workforce.

Keywords: *Career, Challenges, Experiences, Gender Equality, Opportunities, Security Guard, Women*

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Introduction

Mental tranquility is of utmost importance, with security being a fundamental objective for individuals, as indicated by Maslow's Hierarchy of Needs (1943). Security encompasses various elements, including personal assets, family, financial stability, and the psychological and physical assurance of safety. In the context of businesses and organizations, management needs to ensure patrons' and employees' health and safety. Security personnel are tasked with protecting property and individuals, often at significant personal risk, underscoring the necessity for legal protections to ensure their safety and prevent exploitation by employers.

Over the past fifty years, the societal role of women has undergone considerable transformation across various sectors. Fields historically dominated by men have gradually opened to women, allowing them to demonstrate their capabilities as equals. This evolution is evident in diverse roles, including female tricycle drivers, factory workers, and police officers. The presence of female security officers in shopping centers, distribution facilities, and other venues is also increasingly common. However, women continue to encounter numerous challenges in pursuing equality and competence in the workplace. Significant shifts have occurred in women's roles within the home, where they traditionally provide familial care, and in broader societal sectors like business, government, and the private sector, including the security industry. Despite these advancements, the security field remains largely male-dominated; Farley (2021) notes that only 9% of security officers are female. Compounding this, women in security often face disparities; for instance, in the United States, women earn less than their male counterparts, and 64% of women in security report experiencing workplace bullying (Frost and Sullivan, 2017). This issue extends to the Philippines, where male security guards earn approximately 15% more than their female colleagues, as reported by Salary Explorer in 2022.

Despite the limited number of women in the security industry, it is recognized that female security personnel provide valuable insights and address unique security needs, particularly for women, children, and older people. Female guards are often perceived as more approachable and less intimidating, possessing a greater capacity for peaceful conflict resolution. Nevertheless, they continue to encounter various challenges that require attention and resolution. Consequently, this study aims to assess the lived experiences, challenges, and coping strategies of female security guards in Bulacan, focusing on their relational and career significance. The research posits that women can effectively demonstrate their skills and make meaningful contributions to peacekeeping efforts by promoting a diverse workforce.

The study is grounded in the Theory of Change, which was popularized by Carol Weiss in the 1990s, mainly through her work on program evaluation. This theory is also utilized as a framework for planning social change initiatives (Gadsgen et al., 2024). It is particularly relevant to the study's objectives, emphasizing that promoting gender equality and empowering women in the security sector can significantly benefit the women involved and the overall effectiveness and public perception of security services. By incorporating more female security personnel, organizations can leverage their unique attributes, such as compassion and approachability, which are crucial for fostering a safer environment for diverse groups, including women, children, and older people. The study's focus on the experiences and challenges faced by female security guards aligns to create a more equitable workplace, ultimately contributing to peacekeeping and community stability. By adopting targeted support systems and inclusive policies, organizations can cultivate a more balanced and effective security workforce, showcasing the positive effects of gender diversity in traditionally male-dominated fields.

Related Literature

Historically, women have encountered considerable obstacles when entering predominantly male careers. Stamarski and Son Hing (2015) explained that Western countries show that legislative actions, such as the Equal Pay Act of 1963 in the U.S. and similar laws in Europe, were pivotal moments for achieving gender equality in the workplace. Moreover, Parmaxi et al. (2021) stated that organizational policies that foster diversity and inclusion have played a significant role in boosting female representation in STEM fields, with women now making up about 28% of the workforce in these areas, an increase from 8% in the 1970s. These initiatives established mentorship programs and professional development that aided women's career progression in traditionally male-dominated sectors.

In the Philippines, Manebo et al. (2024) indicate that despite cultural barriers, Filipino women have made notable progress in fields once dominated by men. Their study reveals that women now hold 35% of executive roles in Philippine companies, exceeding the global average of 29%. Nonetheless, challenges remain, especially in engineering and technology. Local efforts, such as the Women's Empowerment Act and various NGO-led initiatives, have been crucial in fostering more inclusive workplace environments and offering opportunities for professional advancement (Regalado, 2024).

In terms of the security sector, men have historically dominated it. However, the role and significance of female security guards have notably increased in recent

decades. The inclusion of women in security positions gained traction during World War II when they took on roles typically occupied by men (Staab et al., 2024). Research shows that female security personnel are becoming more common across various industries, including corporate security, retail, and government facilities (Andrade, 2022). Vasko (2024) highlights that female security officers often possess unique skills, such as improved communication and de-escalation techniques.

Meanwhile, Dewanto et al. (2023) emphasized that female security guards tend to excel in specific situations where their presence is particularly beneficial, such as in gender-sensitive security screenings, managing incidents involving female suspects or victims, customer service-focused security roles, and surveillance and loss prevention. These specialized skills have increased the demand for female security personnel in various sectors. Likewise, in the Philippines, there has been a consistent increase in female participation in the security industry. Yuzon-Chaves (cited by the Philippine Commission on Women, 2023) reported that 795 female officers and 3,777 women soldiers, including battalion commanders, make a huge impact and create more spaces for women in the security sector. These statistics indicate that female security personnel, usually seen in shopping malls, retail establishments, educational institutions, healthcare facilities, and corporate settings, are especially valued.

Unfortunately, female security guards encounter challenges that reflect the broader issues women face in male-dominated fields. According to Smith and Sinkford (2022), women in security roles often deal with gender-based stereotypes, doubts about their physical abilities, and implicit biases from both coworkers and the public. These difficulties are exacerbated by organizational cultures that traditionally influence masculine norms and expectations. Angehrn et al. (2021) highlight that female security guards often face "double-standard scrutiny," where their competence is questioned despite having equal or even superior qualifications compared to their male peers. Furthermore, Stephens (2024) shared that women in security positions frequently feel pressured to demonstrate their physical capabilities, even though modern security work primarily relies on technological skills and interpersonal communication rather than physical confrontations. O'Reilly (2015) suggests that organizations that adopt targeted support systems and inclusive policies have seen positive outcomes in retaining female security personnel. The existing research indicates that companies with robust mentorship programs and gender-sensitive policies could increase female security staff's job satisfaction and lower turnover rates. Additionally, organizations may benefit from diverse perspectives in security strategies, as female security guards often exhibit better de-escalation skills and community engagement. These findings are consistent with broader studies on

women in male-dominated sectors, emphasizing that organizational support and cultural change are essential for fostering more equitable work environments.

Methodology

The study employs narrative inquiry and a phenomenological approach as its primary research methodologies, aiming to uncover and articulate the lived experiences of female security guards in Bulacan. Narrative inquiry focuses on enabling participants to convey their life experiences through comprehensive and detailed accounts, as noted by De Marco (2020). In parallel, phenomenological research seeks to explore the daily experiences of the female security guards, facilitating a deeper understanding of their social realities, as highlighted by Alhazmi and Kaufmann (2022) regarding the adaptability of qualitative research in elucidating aspects of human social experience. Additionally, the researchers utilized structured interviews to collect information from the participants. These interviews aim to explore the respondents' experiences, perceptions, opinions, or motivations (Deakin University, 2023). The interview guide was developed based on relevant literature and studies, and experts reviewed the questions for refinement and enhancement. Following these modifications, the instrument was submitted for validation.

The study involved fifteen (15) female security guards with at least two (2) years of experience. The researchers utilized non-probability sampling techniques, precisely convenience and purposive sampling, to select the participants. As Etikan et al. (2015) explain, convenience sampling is a non-random sampling method where individuals are included based on practical criteria such as accessibility, geographic location, availability, or willingness to participate. In this research, convenience sampling was chosen due to the availability of female guards. Furthermore, purposive sampling was used to identify those who specifically met the criteria of having worked as security guards in Bulacan for at least two (2) years. Palinkas (2015) indicates that purposive sampling is often employed in qualitative research to focus on specific traits within a population. This combination of sampling methods ensured that the participants were pertinent to the study's aims and offered valuable insights into their lived experiences.

The recordings from the interviews were transcribed and analyzed using thematic analysis. This method, as described by Braun and Clarke (as cited by Mihas, 2023), involves a systematic process of identifying, analyzing, and reporting patterns (themes) within the data. The process typically includes familiarization with the data, generating initial codes, searching for themes among codes, reviewing potential themes, defining and naming themes, and producing the final report. The use of

thematic analysis is relevant to the study as it aids in organizing and clearly articulating the lived experiences of the female security guards.

Ethical considerations for the research included obtaining informed consent from all participants and ensuring that their personal information would remain confidential and not be used for purposes outside the study. The researchers clarified that participation was voluntary and that respondents could withdraw at any time without any repercussions. Additionally, the interviews were recorded only with the participants' consent, and measures were taken to protect the anonymity of the respondents during data analysis and reporting. These ethical practices were essential to uphold the research's integrity and respect the rights and dignity of the security guards involved in the study.

Results and Discussion

Relational Significance

Lack of Time. In today's fast-paced society, individuals face difficulties in managing their time. Achieving a balance between work and personal life can be particularly tough, especially for those in demanding jobs with extended hours. For female security guards, the primary challenge related to their families is the lack of time due to their 12-hour shifts. They struggle to fulfill their roles as wives and mothers, which hampers their ability to connect with their families. Many of them sacrifice significant amounts of time to make ends meet and often find themselves too exhausted to meet the needs of their loved ones. They typically leave home early and return late at night. As stated by the informants:

> LG 2: "I struggle with not having enough time for my family. I leave for work early, leave my children without assistance, and come home late at night when they are already asleep. Our job as guards requires us to work 12-hour shifts."
>
> LG 5: "My work takes away time from my children. I'm trying my best to provide them a good life."
>
> LG 7: "I often can't care for them anymore; I have no time because our shifts are 12 hours long, which creates a significant gap in my family life, making being a female security guard quite sad."
>
> LG 10: "I've lost the opportunity to call my family back in Mindanao because I'm exhausted from standing all day, and getting a day off can be challenging due to staff shortages. Being a female guard

is tough, especially during emergencies when I can't return home to my family quickly."

LG 11: "Sometimes, it's unavoidable to lose time with my family and husband, especially when we're understaffed and working long hours... but we still manage to understand each other."

LG 15: "There's a lot of miscommunications; we no longer have time to talk. Our conversations have become superficial; we chat instead of having meaningful discussions like we used to. I eat, sleep, and use my phone when I get home. There's no real conversation about how we are, or if we're tired, and since my child is far away, I have no idea what they are doing."

Women globally face more significant challenges in securing employment compared to men. When they do find work, it is often in low-quality, unsafe, or demanding roles, which exacerbates the gender gap. The ability to work in environments that uphold dignity, safety, and fairness is crucial for human welfare (International Labour Organization, 2017). Security guards typically endure long working hours, with benefits varying based on their permanent, temporary, or part-time employment status. In the Philippines, the government permits 12-hour shifts for security personnel due to their rotating schedules. However, these extended hours and limited job opportunities for women lead to personal sacrifices, particularly regarding family time. According to Wise Family Group (2023), insufficient time spent together results in superficial conversations among family members, which can diminish family values such as affection, empathy, understanding, and shared activities. This aligns with Aydin's (2017) findings that long shifts disrupt social and family life.

Time Management. Effective time management is crucial due to the extended hours spent at work. It can enhance productivity, help meet deadlines sooner, and alleviate workplace stress. In personal life, it supports goal achievement, relaxation, and increased quality time with loved ones. While managing time effectively can be difficult, it is particularly vital for female security guards as it enables them to fulfill their family responsibilities and household tasks. As noted by the informants:

LG 1: "I can only do the household chores once I get home."

LG 3: "It doesn't impact our relationship; it's just a matter of adjusting to the time. I take care of my responsibilities at night."

LG 6: "On my day off, I clean the house, give baths to the dogs and cats, and prepare meals for my parents."

In today's world, being constantly busy has become the norm. Striking a balance between work and personal life can often be more complicated than it appears, and the best approach to achieving this balance can differ for each individual and family due to their unique circumstances (Emadi, 2018). Security guards are primarily responsible for safeguarding property, staff, and customers, ranging from mere presence to responding to incidents like robberies and assaults and maintaining peace and order (Hemalatha, 2022). This is also true for female security guards, who must understand their responsibilities to ensure the safety of what they protect. Similarly, as women, they must safeguard their families, which results in them juggling two significant responsibilities: excelling in their professional roles and fulfilling their family obligations.

Personal Sacrifices. A notable finding in the study is that many respondents are single mothers. A significant factor in this situation is the amount of time they can spend with their loved ones. When there is a mismatch between workplace demands and an individual's capacity to fulfill personal responsibilities, sacrifices are made. These sacrifices can be made to support others or to achieve specific goals. A personal sacrifice refers to what someone gives up, whether it is something substantial or something minor and temporary.

> LG 1: "As I mentioned, I have been a single mother since 1999 and continue to be one."
>
> LG 9: "I take on my responsibilities as a mother and solo parent to my three kids, doing my utmost to support them."
>
> LG 14: "I have been separated from my husband since I started working as a female security guard."

The working conditions of female security guards have resulted in various negative consequences. Female security guards experience high stress levels, face numerous challenges, and often feel unhappy with their jobs and compensation. Despite their hard work, they remain dissatisfied with their earnings. Female security guards encounter more significant occupational stress than their male counterparts, as they struggle more to balance work and family responsibilities. This imbalance leads to difficulties not only in their professional lives but also in their relationships (Kiran and Nisha, 2015).

Career Significance

Risky Job. Working as a security guard is inherently risky. Guards face various dangers, including violence, firearms, hazardous materials, and accidents, while performing their duties to protect people and property. Shaw (2018) noted that security guards often lack representation in economic communities and may be unaware of their rights regarding on-the-job injuries. The informants expressed similar concerns:

> LG 1: "I can say that being a female security guard or security guard is comparable to being a police officer or soldier, as we are always on duty with no days off or holidays."
>
> LG 4: "As a security guard, sacrifice and the risk of danger are ingrained in us. We must take care of those we are responsible for."
>
> LG 6: "Working 12-hour shifts is risky and challenging."
>
> LG 7: "As a guard, I monitor all the property of my employer and ensure their safety, protecting them as a security guard."
>
> LG 9: "Being a security guard is a significant sacrifice, especially when faced with accidents or theft; safety is always the priority. It can be frustrating when you have to reprimand employees, but what I appreciate most is when people recognize your efforts, even in small ways, whether they are employees or customers.

Security personnel are a ubiquitous, often unnoticed, part of the infrastructure supporting daily life, involved in tasks from checking baggage to verifying identities and interacting with a public that may respond with varying degrees of engagement (Wiatrowski, 2012). A secure work environment is crucial for business success, and security guards are vital in providing this safety. Thus, it is critical for guards to be aware of the risks they face and to take protective measures. Employers must prioritize employee health and safety, which can save lives, enhance productivity, and lower costs. According to Jonathan and Mbogo (2016), a safe working environment positively influences employees' behaviors and productivity, enabling female security guards to perform their duties effectively.

Gender Equality. In a rapidly evolving world, women increasingly forge their opportunities, recognizing that these are earned through effort rather than given. Many respondents challenge societal norms, driven by a desire to demonstrate equality with men and by economic necessity. This pursuit is often a pathway to a better life, a sentiment the female security guards echoed.

LG 1: "I can say that anything men can do, women can also do."

LG 3: "There's no difference; the responsibilities of male and female security guards are the same, only the gender differs."

LG 5: "Some people believe that women lack the capability of male guards, but our work is equal; whatever men can do, we can do too."

LG 10: "While men may be physically stronger, women can accomplish the same tasks. In this profession, men tend to dominate."

LG 13: "As a woman, I can confidently say I am strong."

LG 15: "Nowadays, there is equality; we can perform the same tasks as men or even surpass them, and they can do what we do. It comes down to understanding between men and women, although the Bible states that women should submit to men."

Despite prevalent gender discrimination narratives highlighted on social media, where traditional roles often confine women to domestic tasks and men as primary breadwinners, the current feminist era sees women capably performing tasks traditionally assigned to men. Women are no longer universally viewed as weak and can excel in roles such as female security guards. White (2020) notes an often-overlooked issue regarding women's participation in the security sector, where some women actively address gender issues while others seek equal treatment alongside male colleagues. The female security guards in Bulacan largely expressed confidence in their roles and responsibilities, perceiving a degree of gender equality in their profession. Their ability to perform these roles effectively challenges traditional gender paradigms in labor, particularly within a male-dominated field.

Personal Development. The female security guards asserted that they perform their duties honestly and diligently, sometimes perceiving themselves as more so than their male counterparts. They clearly understood their responsibilities and committed to working with warmth, concern, trustworthiness, and dependability. These qualities are often cited as reasons for preferring female security guards.

LG 2: "As a female security guard, my responsibility is to fulfill my duties and protect the company I work for."

LG 3: "I conduct observations at my post, take over responsibilities from the outgoing night shift guard, monitor my area,

and assist VIP personnel. This role fosters self-discipline, particularly in how I interact with others."

LG 5: "The role of a female security guard involves overseeing her assigned area. In my position, I concentrate on monitoring the entry and exit of employees at the entrance, including conducting employee checks and body frisking."

LG 6: "I expand my network, make new friends among fellow guards, and most importantly, learn about the responsibilities of being a guard."

LG 7: "As female security guards, we have the advantage of holding a license, allowing us to apply for guard positions anytime and anywhere."

LG 8: "My role as a guard benefits my family, myself, and our community by providing security in our markets."

Some female security guards derive enjoyment from their roles, maintaining a positive outlook despite the routine nature of the work. They use their positions to expand networks and build confidence. While striving for gender equality involves asserting equal capability in shared tasks, personal development in this context relates to individual growth, skill acquisition (like self-discipline and networking), and professional identity cultivated through performing their duties. According to the WeAreTechWomen Team (2020), female security guards often work alongside male colleagues, addressing situations on equal terms. While the physical presence of male officers can deter threats, not all female guards possess the same physical attributes. However, women in these roles can excel at responding to situations and resolving conflicts effectively without physical confrontation, demonstrating a different, yet equally valuable, skill set. This capacity for non-confrontational resolution and responsible conduct reflects a key aspect of their professional development and contribution.

Issues and Challenges

Discrimination. Sefalafala (2012) notes that security guards are often among the most exploited, oppressed, and vulnerable workers. Their work is marked by precarious conditions filled with tension, uncertainty, and significant insecurity. Many individuals perceive them as if they are paying for their services, overlooking that security guards are also human beings. They sometimes face similar treatment from their coworkers, who fail to provide the necessary support for adjustment.

LG 3: "People who take advantage of others."

LG 5: "Yes, mistakes do happen sometimes."

LG 8: "Stubborn employees and customers require constant vigilance due to missing items; the responsibility falls on the guard, especially during sudden influxes of customers when careful observation is essential."

LG 9: "It's tough. There are rude individuals and customers. Sometimes, it can be frightening, as they might suddenly grab you, and everyone, including the managers, is watching."

LG 12: "Yes, I've been questioned, especially since I'm older. People seem to think, 'You're old; why are you still working as a guard?' Wealthy customers often act superior, as if they are above others. They look at you and make gestures that imply disdain. When their bags are checked, they often ask, 'Are you sure?'"

It can be observed that female security guards frequently encounter discrimination and harassment in the workplace. These obstacles can hinder their ability to perform their duties effectively, as they are responsible for ensuring their safety, the people they protect, and the property under their care against potential threats and dangers. To execute their roles efficiently, female security guards must meet their physiological, economic, and social needs as they take on this challenging responsibility.

Coping Mechanisms

Patience and Calmness. In any security situation, the security guards must always practice maximum tolerance. Their patience and calmness must always be put into practice. Many male security guards have a physical presence, which is advantageous in avoiding threats, but not all ladies are built similarly. Women may not be the same size or have the same physical strength as men, but women can be more adept at reacting to situations. Many people test their patience and provoke them, as stated by the informants,

LG 1: "Calmly engage with them. Remind them to adhere to the company's rules and regulations and avoid getting into arguments."

LG 5: "Minimize errors, think critically, explore new ideas, and seek advice from others."

LG 8: "It's essential to remain calm; maintaining focus is crucial for us, along with being alert in our actions and communicating properly."

LG 9: "I strive to do my utmost to carry out the responsibilities entrusted to me."

According to Farley (2022), there is a critical need for female security officers in the field. Women constitute 50% of the population and have specific security needs that require female protection in spaces designated for women. The presence of male security personnel in areas such as bathrooms, dressing rooms, and changing rooms can cause discomfort and fear among women. Therefore, female security officers are preferred and essential in these environments, particularly for pat-downs and body searches. Women, children, and young people often find female security personnel less intimidating and more approachable, which helps create a more comfortable atmosphere for them.

Support and Assistance Received

According to Pinzo and Rosel (n.d), security officers are allowed three days off every fifteen days. Their employment benefits include a clothing allowance, double pay on legal holidays, and a 30% bonus on Sundays and special holidays. Additionally, the 13th month's pay should be automatically included in the guards' monthly salaries. Most security agencies comply with legally mandated benefits, such as contributions to the Social Security System (SSS), PhilHealth, and PAG-IBIG, to ensure fair pay and treatment. However, some security firms do not follow these government regulations despite them being legally required. As one female security guard noted, "It depends on the agency. Some agencies do not provide benefits, like not contributing to SSS and PAG-IBIG." On a positive note, all the interviewed female security guards receive their 13th-month pay, as law mandates. The female security guards also indicated that bonuses vary based on the company's willingness to provide them.

Conclusions and Recommendations

As global society progresses towards gender equality, barriers are diminishing, fostering more balanced rights and opportunities across genders. The female security guards in Bulacan are participants in these societal shifts. However, this study reveals that, for many, working as a female security guard in the province is driven more by economic necessity than solely by the pursuit of equality. These women dedicate

substantial time to their work, often sacrificing valuable moments with loved ones and attention to household responsibilities. A notable consequence of these demanding conditions is that many of the interviewed female security guards are single mothers.

The findings indicate that female security guards bring a unique perspective to their roles, often being perceived as more approachable and less intimidating than their male counterparts. This perception, while beneficial in many interactions, can unfortunately be exploited by some individuals, leading to experiences of discrimination. Overall, the study affirms that female security guards are invaluable assets to the security sector due to their inherent qualities of compassion, interpersonal connection, and understanding. They also play a crucial role in fostering peace and stability within society. Empowering women enables them to contribute positively to their families and communities, which can aid in reducing poverty, enhancing education and healthcare outcomes, and promoting peace and security. Consequently, women's empowerment is vital for creating a better future. This study contributes to understanding women's roles and challenges in the security sector.

Based on the findings, the researchers recommend that Local Government Units consider initiatives to assist security guards in receiving fair and just compensation. While the study suggests that most security agencies in Bulacan comply with legal standards for benefits, some do not appear to do so. Therefore, it is suggested that relevant authorities inspect these agencies to ensure all security guards receive their entitled benefits, such as SSS, PhilHealth, and PAG-IBIG contributions.

It was also noted that female security guards generally receive no additional benefits beyond those mandated by law. Considering the inherent risks they face in protecting people and properties, as highlighted in the "Risky Job" theme, providing hazard pay would be a reasonable measure. The female security guards themselves indicated that a salary increase commensurate with their 12-hour shifts would be highly valued. Working as a female security guard is challenging due to the nature of the job. Although there is a demand for private security, the current pay is often low and inadequate to support a family, a particular hardship for the single mothers identified in this role. Addressing these compensation and benefits issues is crucial for these essential personnel's well-being and fair treatment.

Finally, the researchers acknowledge certain limitations in this study. For instance, a triangulation method could enhance the representation of perspectives from local government units (LGUs) and security agencies, providing a more comprehensive understanding.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

A Critical Analysis of the Testimonial Literature for the Filipino Desaparecidos

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Abstract

This study offers a critical analysis of testimonial literature authored by the bereaved family and friends of the Desaparecidos—victims of state-enforced disappearance. The study employs a qualitative research design, incorporating content and textual analysis, investigating the themes, voices, and literary expressions employed by the writers to underscore the power of narrative in conveying their experiences. Through close reading and examining how trauma dictates these narratives and how acts of testimonial writing serve as forms of resistance, this study illustrates the essential role of testimonial literature in preserving the stories of the Desaparecidos. Additionally, the study critically examines stylistic elements, diction, metaphor or tropes, and other literary devices utilized by the writers. In short, this paper explores the interplay of themes, authentic voices, literary expressions, and social and political contexts, thereby highlighting how literary art becomes a tool for resistance against historical erasure.

Keywords: *Desaparecidos, Filipino, Grief, Memorial Texts, Trauma*

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Introduction

In Remembrance: A Journey Into the Lives of the Philippine Desaparecidos

The term "desaparecido," derived from the Spanish verb desaparecer, meaning "to disappear," originally referred to victims of state-sponsored violence in Chile and Argentina during the 1970s and 1980s, where notorious "death flights" led to victims being disposed of in the sea (Lagman, 2015). In the context of international law, particularly the Rome Statute of the International Criminal Court, a desaparecido is defined as an individual who is arrested, detained, or abducted by state authorities or with their consent, followed by a refusal to acknowledge this deprivation of liberty, thus removing the individual from legal protection for an extended period (p.5). In the Philippines, the Republic Act 10353, known as the Act Defining and Penalizing Enforced or Involuntary Disappearance, outlines three critical elements: the enforced disappearance involves the deprivation of liberty through arrest, detention, or abduction; the perpetrators are state agents or act with state support; and there is a deliberate effort to conceal the whereabouts of the disappeared individual. Notably, CNN's description is particularly striking, indicating that a desaparecido refers to those who have been unaccounted for since the imposition of martial law, specifically highlighting the widespread disappearances that occurred during Ferdinand Marcos's regime following Proclamation 1081.

Enforced disappearance is entrenched in a system marked by exploitation and oppression, fostering poverty and violations of fundamental human rights. It serves as a tool for repression wielded by governments against dissenting voices, often justified under the guise of maintaining peace and order or safeguarding national security against those labeled as "enemies of the state" (FIND p.3). Dictatorial regimes have frequently employed enforced disappearance to silence suspected political opponents. The very nature of these disappearances complicates prosecution, as the obliteration of evidence makes it challenging to establish accountability for state actions.

The first documentation of missing persons in the Philippines began in 1974 and was initiated by the Task Force Detainees of the Philippines (TFDP), the country's pioneering human rights organization. TFDP identified involuntary disappearance as a significant human rights violation, noting that victims typically included individuals involved in social justice movements or those defending civil, political, social, economic, and cultural rights. Many of the disappeared were political activists or government critics (FIND, p. 5).

Historically, the highest recorded number of Desaparecidos occurred during President Ferdinand Marcos's administration, spanning from 1965 to 1986. During this

period, 878 cases of enforced disappearances were documented, with only 138 individuals eventually found alive and 127 confirmed dead, leaving 613 still unaccounted for. Notably, 535 of these cases occurred between 1983 and 1985, marking the peak of human rights abuses during the Marcos regime before its fall in 1986 ("Hope and Despair," 2012). Following the People Power Revolution that brought Corazon Aquino to the presidency in 1986, human rights violations persisted, largely due to the government's reluctance to prosecute military personnel implicated in abuses. Under Aquino's rule, 612 documented disappearances occurred, with 407 individuals still missing, 108 found alive, and 97 confirmed dead. Subsequent administrations continued this troubling trend, with Fidel Ramos reporting 87 disappearances (40 still missing), Joseph Estrada 60 (39 resurfaced alive), and Gloria Arroyo's administration recording 95 cases (47 still missing).

These statistics reveal that despite the end of Marcos's dictatorship, enforced disappearances have remained a grim reality. Under President Rodrigo Duterte, the situation has deteriorated further, with disappearances linked to controversial anti-drug operations. While FIND has yet to provide comprehensive data on disappearances during Duterte's term, the numbers continue to rise, compounded by the return of Ferdinand Marcos Jr. to the presidency. More than five decades after the Marcos era, the families and friends of the Desaparecidos remain in a state of unresolved grief, haunted by the absence of closure and the lack of graves to visit.

The persistence of testimonial narratives, from the Martial Law era to the Duterte administration, proves a grim continuity of political violence in the Philippines. While official history often erased or downplayed the experiences of the Desaparecidos and their families and friends, many recent scholarly and journalistic works foreground the role of testimonial literature in challenging the dominant narratives and confronting historical amnesia. Gloria Melencio's Stories of the Nameless (2017) documents the personal testimonies of ten Martial Law victims from Luzon, Visayas, and Mindanao. Melencio's work reclaims the narratives of those rendered invisible by official history. Complementing this, Patricia Evangelista's acclaimed Some People Need Killing (2023) offers a contemporary parallel—detailing extrajudicial killings under Duterte's regime through a literary journalism lens. Though focused on a different period, Evangelista's work underscores the continuity of state-sanctioned violence and the testimonial form as resistance and remembrance.

Though the disappeared may have found their final resting places, persistent societal sectors continue to search for justice. The written word continues to provide space for resistance, remembrance, and justice. The irony lies in the fact that while the

disappeared may have been lost to history, their absence continues to resonate profoundly in the lives of those left behind.

From Grief to Artistic Expression: Writing of the Testimonial Literature for the Philippine Desaparecidos

Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos is a poignant anthology of poems, letters, and testimonials that encapsulate the experiences of families who have lost loved ones to enforced disappearances. Released by the organization Desaparecidos in collaboration with the Amado V. Hernandez Resource Center, this collection aims to raise awareness among Filipinos about the alarming increase in abductions and enforced disappearances in the Philippines. According to the human rights group Karapatan, there have been 205 recorded victims since President Gloria Macapagal-Arroyo assumed office in 2001.

Organized by the names of 27 Desaparecidos, the anthology primarily highlights victims who vanished during the Arroyo administration, with a few cases linked to the regimes of Presidents Corazon Aquino and Ferdinand Marcos. Each family member contributes a personal narrative that provides a human face to these victims, portraying them as devoted fathers, caring mothers, loving husbands, and dedicated daughters. This humanization is crucial, as the collection reveals the depth of loss experienced by the families.

While many of the Desaparecidos were actively involved in advocacy for human rights—particularly concerning the welfare of peasants, indigenous peoples, and workers—the collection also includes ordinary citizens ensnared in military counterinsurgency operations. This includes the son of a National Democratic Front consultant, another consultant's niece, and a peasant organizer's brother, whose stories highlight the state's desperation to quell dissent. Particularly gripping are the testimonials of Raymond Manalo and a poem by Melissa Roxas, both survivors of torture and abduction. The vivid accounts from Bonifacio Ilagan about his sister Rizalina, a victim among the Southern Tagalog 12, further illustrate the brutality perpetrated by state agents.

Cultural critic Rolando B. Tolentino, one of the workshop facilitators, noted that writing about the Desaparecidos requires participants to confront their grief. This painful yet necessary process allows them to craft farewells to their loved ones. During the workshops, the focus was not on producing excellent writing but on enabling relatives to articulate their thoughts and fears. While only four contributors were seasoned writers, many others were able to create powerful literary pieces that reflect their experiences.

The sincerity of these contributions gives the collection profound impact and significance, serving as a tribute to those lost while articulating the interplay between cultural trauma and collective memory. The experience of participating in the workshops was both painful and liberating for the families involved, ultimately culminating in a powerful literary expression that memorializes the Desaparecidos while contributing to the broader discourse on human rights and societal change in the Philippines. Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos is a vital platform for voices seeking acknowledgment and justice, shedding light on the ongoing struggle against enforced disappearances.

The people behind this anthology of testimonial writings comprised of multi-awarded editors who are renowned in the academe and the field of letters: Rommel B. Rodriguez—Palanca winner in short story writing, and Roland Tolentino—former Dean of and professor at the UP College of Mass Communication. The facilitators of the workshop were writers and academicians too—Mykel Andrada, Vlad Gonzales, and Romulo Baquiran, Jr., who provided with the proper conditioning of the heart and mind, propelling creative juices to flow and who persevered in putting perspective in the overflow of emotions lest these emotional releases become a mere emotional release for pent up grief and sorrow of the bereaved contributors.

And then there were the forty writers of this collection of testimonial literature. They were the family and friends of the Desaparecidos who give shape to thoughts and emotions that need articulation, who endured the suffering that this workshop entails, which means revisiting the ghosts of their past, confronting the harsh truths, and voicing out the screams long silenced because of hopelessness. They were the brave men and women who called and created from their daily dose of anxiety, pain, fear, and desperation in this anthology of testimonial texts. Lastly, the 36 Desaparecidos to whom these texts are dedicated. Their disappearance is an active stimulus that makes the bereaved families and friends forever vigilant. The missing 36, despite their disappearance, are forever etched in their minds and hearts.

The Impromptu Writing of the Testimonial Literature for the Desaparecidos

Impromptu writing is often created in spontaneous settings, such as workshops or community gatherings, where individuals are encouraged to write without the pressure of expectations. In contrast, other testimonial works may be produced in more formal settings, often involving interviews, psychologist guidance, or structured community advocacy. This contextual difference can influence the overall tone and content of the writing.

The literary compilation emerged from a series of workshops facilitated by members of the Congress of Teachers and Educators for Nationalism and Democracy (CONTEND). The workshops were designed not only to produce literary work but also to serve as a therapeutic process for the participants, who were guided by psychologists from the Community Medicine Development Foundation (Commed) in processing their trauma. Additionally, materials featured in the book were compiled by Ipe Soco, the son of a desaparecido.

The literary journey of the family and friends of the victims of enforced disappearances began with a transformative workshop in May 2008, which eventually led to the publication of Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos. The bereaved of the Desaparecidos were the major participants in this endeavor that emerged from the collaborative efforts of Desaparecidos, an organization representing families of the disappeared, along with Pagbutlak, the official student publication of the University of the Philippines Visayas College of Arts and Sciences. This collection is the result of a series of workshops led by members of the Congress of Teachers and Educators for Nationalism and Democracy (CONTEND-UP).

The organizers first gathered the participants, who were mostly family and friends of the disappeared. The procedure was prudently handled in such a way that the participants would seem to come from a debriefing session beginning with a structured dialogue where they try to dissect what occurred, relive the experience, process the emotions, and write about them. Rolando B. Tolentino, a prominent Filipino cultural critic, played a key role in this workshop, highlighting the unique struggles faced by families and friends of the disappeared as they sought to articulate their grief and trauma through writing. Tolentino pointed out that writing about the Desaparecidos is not merely an act of creativity but an emotionally charged task that compels participants to confront their deepest fears and frustrations.

In consideration of the fragile emotional states of the bereaved family and friends of the Desaparecidos, the workshop facilitators approached the participants' trauma with care by creating a "safe space" conducive to introspection and expression. This metaphorical space resembled a house with exits, allowing participants to withdraw if their emotions overwhelmed. The collaborative efforts of educators and sociologists were crucial in fostering an environment that encouraged creativity while minimizing distressing stimuli. This thoughtful methodology was instrumental in helping the families of the Desaparecidos to confront and articulate their trauma, ultimately leading to a powerful literary expression of shared experiences.

At the book launch on January 8, 2010, Tolentino recalled that for many contributing writers, the process of writing became a way to bid farewell to their loved ones, who may never return, and thus required a painful but essential confrontation with sadness. Tolentino further argued that writing served as a form of therapy, helping participants work through the trauma linked to the continued absence of their loved ones. Despite the associated pain, many found the act of writing to be liberating. This anthology of testimonials pays tribute to those lost. It includes letters, poems, bio narratives, and various other forms of expression that convey myriad emotions—guilt, hopelessness, anger, yearning, hope, and resilience. The authenticity of their contributions makes this collection a deeply resonant literary work.

The compilation illustrates the intricate relationship between cultural trauma and collective memory. It ties together the objective portrayal of the traumatic experiences of the Desaparecidos with the subjective narratives shared by their surviving relatives. Through this process, cultural trauma emerges as collective memories seeking acknowledgment and catharsis through the written word.

Again, another peculiar attribute of this collection is the impromptu writing of the testimonial literature. It is said that in spontaneous writing, the process of expressing feelings can be as important as the final product. Writers may create testimonials as part of a cathartic or healing exercise, prioritizing personal expression and emotional release rather than crafting a polished narrative. This approach can facilitate healing for the writer and readers, who might see their own experiences reflected in writing testimonials.

Methodology

A rigorous and interdisciplinary methodology is essential to conduct a critical analysis of a compilation of testimonial literature on Desaparecidos (the forcibly disappeared). This type of literature is politically and emotionally charged. It is both a literary and political artifact, marked by its dual function as a literary text and a historical witness. The appropriate methodology for this research combines literary analysis, historical contextualization, and critical theory—particularly cultural trauma theory.

A rigorous critical analysis must begin with deep historical contextualization. Testimonial literature on Desaparecidos is intimately bound to specific state apparatuses of violence, often emerging from periods of dictatorship, civil war, or counterinsurgency. For example, in the Philippines, the narratives of enforced disappearances are entwined with the legacy of Martial Law under Ferdinand Marcos and later human rights violations during the Duterte administration. Understanding

the period's legal frameworks, military strategies, and resistance movements is essential for decoding these texts' urgency and coded language. Without this contextual grounding, critical interpretation risks abstraction or dehistoricization—detaching the literature from the lived reality it seeks to preserve

Yet, in a critical study of testimonial literature, the literary dimension emerges as the most dominant analytical lens. While historical and traumatic contexts are undeniably integral to understanding testimonial narratives—particularly those involving the Philippine Desaparecidos—it is through the formal qualities of the text, such as narrative structure, voice, imagery, and rhetorical strategies, that the testimonies acquire their full expressive and affective power. The testimonial is not merely a repository of factual recollection or psychological catharsis; it is a crafted literary artifact that engages the reader through its aesthetic choices and symbolic resonances. History and trauma provide essential context and thematic substance, yet they function as secondary layers that are mediated, interpreted, and shaped by literary form. This literary construction ultimately transforms private pain into a public act of witness and cultural memory.

Close reading becomes the initial step to apply this literary witnessing and methodology—a detailed and analytical approach that carefully examines the texts' language, structure, and literary devices. The literary craft and expression become the focus of the evaluation. Another approach is thematic analysis, which involves identifying and exploring key themes that emerge from the testimonial writings. Though the contributors' outputs are pretty much the same, it is imperative to give attention to the authenticity of the voice behind the testimonials. Assessing authenticity involves examining how effectively the texts convey the lived experiences of the individuals involved, including their struggles, emotions, and reflections. An authentic voice resonates with the reader, offering a deep sense of the personal and collective trauma associated with the events being recounted.

Results and Discussion

Theorizing the Narrative of Suffering: The Role of Witnessing, Memory, and Trauma in Capturing the Collective Experience

In *Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos*, trauma takes the appearance of not only the brutal disappearances of individuals but also the lingering agony endured by those left behind. Families of the missing relive the horror—from the moment of abduction to the physical and psychological torture suffered by their loved ones to the endless, futile search for answers. This unresolved grief and uncertainty prolongs the suffering, transforming it into a collective wound

that marks entire communities. The disappearance of the *Desaparecidos* does not end with their physical absence; rather, it continues through the painful waiting, the fragmented memories, and the irrevocable changes in the identities of those left searching. Their lives are permanently reshaped, haunted by a past that refuses closure and an unhealed trauma that extends beyond personal grief into the fabric of cultural and historical consciousness.

The Cultural Trauma Theory provides a framework for analyzing how the trauma of disappearance is not just an individual loss but a deep, collective wound that reshapes group identity, memory, and historical consciousness. Some of the most significant academic contributions to trauma studies have been made by scholars such as Prof. Cathy Caruth (English and Comparative Literature), Prof. Shoshana Felman (Comparative Literature), and Prof. Jeffrey Alexander (Sociology). Caruth extended Freud's concept of "traumatic neurosis" and linked it to post-traumatic stress disorder, defining trauma as an overwhelming experience of sudden or catastrophic events, with responses that often manifest belatedly and in uncontrollable, repetitive occurrences (1996, p.11).

Felman (2002) built upon Caruth's work, addressing the notion of delayed or belated trauma. She argued that when trauma is recalled belatedly, it allows victims and survivors to bear witness to their harrowing experiences, giving voice to their suffering and making their pain visible to others. This concept of delayed reliving and the importance of witnessing—both as an act of listening and empathizing—became central to the formulation of Literary Trauma Theory.

While Caruth and Felman primarily focused on individual trauma, Jeffrey Alexander introduced the concept of *cultural trauma*, distinguishing it from personal psychological wounds. Unlike individual trauma, which is an immediate emotional response to a catastrophic event, cultural trauma is not instantly perceived but instead develops over time through collective memory, assimilation, and signification. Cultural trauma, Alexander explains (2004), occurs when members of a group experience a profound and horrifying event that leaves an indelible mark on their collective consciousness, permanently altering their identity and reshaping their future in fundamental and irrevocable ways.

Unlike personal/individual trauma, which manifests as an individual psychological response to a catastrophic event, cultural trauma develops through a shared process of mourning, remembrance, and social recognition. The families of the *Desaparecidos* experience not only the immediate pain of losing a loved one but also prolonged and unresolved suffering due to the uncertainty surrounding the fate of the missing. The absence of closure—whether in the form of bodies, answers, or justice—

keeps the trauma alive, making it an ongoing collective experience rather than a single moment of crisis.

In the case of *Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos*, the Cultural Trauma Theory, as conceptualized by Jeffrey Alexander and other scholars, plays a critical role in understanding the collective grief, pain, and hopelessness experienced by the families of the *Desaparecidos*—individuals who have been forcibly disappeared by oppressive regimes, often in contexts of political violence and state terrorism. This theory provides a framework for analyzing how the trauma of disappearance is not just an individual loss but a deep, collective wound that reshapes group identity, memory, and historical consciousness.

Analysis of the Literary Craft of Testimonial Literature for the Desaparecidos

In examining the testimonial literature concerning the Desaparecidos with a primary focus on its literary construction, rather than treating these texts solely as historical documentation or psychological expressions of trauma, the analysis foregrounds the deliberate literary techniques employed by authors to shape testimony into compelling narratives. Close reading gives attention to narrative structure, voice, and tropes. While the political and traumatic contexts inform the content, this study asserts that the literary craft—the shaping of language, form, and symbolism—renders these testimonies powerful cultural artifacts.

The Weight of Words: Themes and Authentic Voices in Testimonial Writings for the Desaparecidos

The theme of Emotional Dislocation

The most apparent theme in the literary texts compiled in *Pagtatagpo sa Kabilang Dulo*: *Panitikang Testimonial ng Desaparecidos* is grief and loss. The bereaved would feel a gamut of emotions, but all sum up to grief and loss. In describing the experience of losing her son, Jonas, Editha Burgos describes it as losing the capacity to express or the inability to articulate because the pain, sadness, frustration, and hopelessness put you in a state of numbness that leaves you speechless. In the poem *"Prime of Freedom*", a mother's love needs telling (2009, p.133):

Need to talk but cannot
Need to cry, tears flow not
The words are missing
And the teardrops bottled

Numbness has set it
No, this is not a sin
For I am ever conscious
This too is superfluous.

The heavy weight of emotions is a struggle for Isabelita Batralo who felt the load too much to carry. Losing his brother Cesar put her in prolonged agony of waiting. She claimed in a testimonial poem titled *"Para Sa Iyo, Kapatid Ko",* there will be no let up to her longing for the chance to see his brother Cesar (2009, 124):

Hindi matatapos ang paghihirap ng kalooban
Dalahin na kay bigat, kailan mababawasan
Mga katanungan na wala man lang kasagutan
Kailan, paano, at saan kita matatagpuan?

Nights are unbearable for Coni Empeno who is haunted by the nightmare that befell her daughter Karen. A mother feels more her desolation at night when she remembers her missing daughter. In the poem, *"Para sa Iyo, Anak*" (2009, p.156) she confessed:

Sa tuwing sasapit ang aking pagtulog
luha at hinagpis ang siyang bumabalot
naisin ko mang ibaon sa limot
subalit di kaya at binabangungot

Sa buong magdamag mga mata'y dilat
Ang dilag na anak sa isipa'y yakap
nang dahil sa kanya'y pamilya'y namulat
Sa dusa ng bayan lalo na ang mahirap

When two members of her family disappeared and were feared dead, the enormity of the loss is beyond acceptance. Liza, daughter of Rogelio Calubad, mourned not for one but two Desaparecidos. In the poem *"Mahal Ka Namin"* (2009, p.166), she claimed that she could hardly pick the broken pieces of herself:

Ako ay nasa isang madilim na silid
Walang anumang liwanag na naaaninag ang aking mata
Hindi ko alam kung saan ang malambot na kama
Hindi ko rin alam kung makikita ang aking mata.

In the twelfth year of her father's disappearance, Ghay Portajada seeks solace from the sea, particularly from its waves, hoping to find the answer—her father's whereabouts, Armando Portajada. The poem "Dagat" (2009, p.258) speaks of affective yearning for the physical presence of a long-lost father whose disappearance has run for more than a decade.

Sa dagundong ng alon
Kita'y hinahanap
Ako'y nangungusap na ikaw
ay aking makita.

Patuloy kitang hinihintay at hinahanap
Tinatanong sa alon kung ikaw ay nasaan
Ngunit tila maging ang ingay ng alon
Ay walang balita.

In June 2006, Gloria Soco left her husband and two children in Manila to visit her ailing father in Samar. She never returned. Apparently, she took a free ride with her uncle and his companions en route to Samar. The vehicle was apprehended and disappeared. On Mother's Day, two years after Gloria's abduction, daughter Lydia wrote a moving letter (2009, p.188):

> *Hindi ako magtatanong kung ano ang kalagayan mo, pero sana hindi ka nahihirapan. Minsan, iniisip ko na magising na ako kung ito ay panaginip lang pero hindi. Nangyayari ito nang walang may gusto. Hindi mauubos ang mga luha ko tuwing maiisip at maalala kita. Sana nandito ka ngayon, mabati, makausap at mayakap ka anumang okasyon ang dumating.*

Dee Ayroso composed a letter for her missing husband, Honor. Entitled *"Isang Liham sa Isang Asawang Apoy na Nawawala"*, the letter reveals how the disappearance of Honor has debilitated her from being the guide and life to others who rely on her for strength (2009, p.78):

> *Mahal ko, alam kong malaki ang nabawas sa kakayahan kong magbigay-ilaw, at init, at naapektuhan ako ng hagupit ng malalakas na hangin at ulan. Pero nandito pa rin ako at nagsisikap magsilbing liwanag sa munti mang paraan ay nagbibigay tanglaw sa katotohananng pumupunit sa dilim kasama ang iba pang tulad natin, mga sulo ng bayan na di mauubos ang liwanag sa pagsasama-sama.*

Belet Batralo's father was abducted in the afternoon of December 21, 2006, after a meeting with fellow rally organizers from Southern Luzon. Cesar Batralo never appeared since then. Belet found her voice in the poem "Luha ang Kapiling" as she declared that her repressed emotions get released only when alone at night (2009, p. 118):

Impit na hikbi sa kalaliman nitong gabi
Parang inakay na walang inahin sa tabi
Hinimay-himay bawat hibla ng pangyayari
Kung ano ang pagkukulang at pagkakamali

Mga patak ng luha'y kay hirap pigilin
Mga tanong sa sarili'y kay hirap sagutin
Katulad ng iba na patuloy na naninimdim
Umaasang isang araw sila ay darating.

The theme of Resistance in Pursuit of Justice and Truth

Another prominent theme in this anthology of testimonial texts is the powerful voice of resistance in the pursuit of justice and truth. While the testimonies capture deep grief and sorrow, the contributors seize the opportunity to express their yearning for justice, their struggle for accountability, and their quest for the truth to emerge. Many narratives highlight the resilience and resolve of families and communities in the face of adversity, illustrating their relentless fight against impunity. In the poem titled "Desaparecidos" by Adora Faye de Vera (2009, p.23), she does not hold back her emotions and boldly declares:

Hahanapin kita sa angil ng punglo
Sa tinik ng gubat silahis ng sulo
Ipagtatanong ka sa libong kamao
Sa kaway ng bandera't dagundong ng maso.

This opening stanza is already powerful, clearly articulating her intentions. The persona is resolutely committed to finding her beloved, even in the face of seemingly insurmountable obstacles. This is an angry poem, likely written immediately after a session focused on cultural trauma. However, it is also crafted with a sense of purpose, as the personal narrative intertwines with the broader mission of the movement.

Firmly resolved to take action after ascertaining the fate of her father, Belet resolved that people responsible for his forced disappearance would be facing the consequence of the trial with the people in a united front. This armed struggle is bent

on claiming justice and asserting their basic rights. Belet Batralo's poem titled "Laban" resonates with this sentiment (2009, p.123):

Matukoy ko lang sana kung nasaan ka na
Nang bangungot sa pagkawala'y matapos na
Pananagutin sino pa man ang may sala
Maniningil, kasama ng sanlakang masa

Kapit-bisig na haharap sa ambang laban
Sa pamahalaan na nagbibingi-bingihan
Pagkat iisa lang, mithiing ipaglaban.
Katarungan at karapatan, hangad na makamtan.

For Dee Ayroso, she has long accepted the impossibility of seeing the husband again but she vowed to remain strong and undaunted in fighting for cause of the Desaparecidos. This she vowed to do in a fierce poem titled "Search" (2009, p.79):

Pero kahit hindi man kita matagpuan
Alam kong gusto mong makita ko
Ay hindi lang ikaw at katarungan
Kundi ang lakas at tapang sa pagsuong sa laban.

Karen Empeno was activist Oscar's idealistic, progressive, and passionate daughter. Her Sociology course at UP Diliman and her father's radical ideologies propelled her to get involved in the movement even at a young age. Her mother, Coni, took it upon herself to continue the noble undertaking of her daughter—a pledge she swore to Karen through the poem "Para sa Iyo Anak" (2009, p.156).

Huwag pabayaan ang ganitong lagay
bayang sinisinta'y dapat ipaglaban
Sa mga namumuno na lubhang gahaman
dapat maputol na itong kabuhungan

Sa aking sarili ay naipangako
sinimulan ng anak di dapat mabigo
Kanyang ipinaglaban huwag isusuko
ipagpapatuloy gawaing nahinto.

Through the essay "Lapis", Ipe Soco, who has long been searching for his mother Gloria since her disappearance in June 2006, commits to writing no matter how

painful the words flow from the pen if only to stop the forced disappearances. (2009, p.192):

> *Nakalimutan ko na ang pakiramdam kung paano paikutin at paglaruan ng aking mga daliri ang lapis bago magsulat ng mga salitang gusto kong sabihin, o di kaya ay 'ung mga salitang magbibigay ng buhay sa aking nararamdaman…..Magtatasa uli ako ng panibagong lapis, nang matulis na matulis, kasintulis ng dilang naniningil sa estadong kriminal.*

Ghay Portajada views her husband's disappearance as a catalyst for bigger things in the future. In the poem titled "Ikaw na Nawawala", she claimed that Armando may be absent physically but his ideas, his principles perpetuate for the next generation, for the next big revolution (2009, p.257):

Ikaw na nawawala, kinuha ka sa amin
kinuha ka masang iyong pinaglilingkuran
Kinuha ka sa sinapupunan
Ng iyong ina!

Kinuha ka sa puso pero hindi sa diwa;
dahil ang prinsipyong iyong pinanday;
tangan ng mga manggagawa, magsasaka
at sambayanang iyong minahal.

Belet Batralo captured in the poem "Mulong" how the disappearance of fellow activist Romulo Robinos impact the future of the organization. The accountable will pay, justice will be served, and the forced disappearances will stop (2009, p. 264):

Kalayaang mithi, mapapagtagumpayan sa pakikibaka
Hindi magtatagal, katanunga'y masasagot na
Tanaw sa silangang mapula, katarungang asam ng bawat isa
Ang mga Desaparecidos ay makikita at di na madadagdagan pa.

Tracing Authenticity of Voice in Testimonial Works for the Desaparecidos

In analyzing testimonial works related to the Desaparecidos, the concept of authenticity of voice emerges as a critical factor that shapes the reader's understanding of the profound experience of loss, resistance, and the quest for justice. These elements are intricately woven into the themes of the narratives, revealing not just personal struggles but also collective sentiments and a united front against oppressive authorities. The exploration of the authenticity of voice in the testimonial works

surrounding the Desaparecidos reveals a gamut of emotions and collective struggles experienced by families of the disappeared. These poems, essays, letters, and anecdotes articulate personal grief and serve as powerful declarations of resistance and call for justice.

The theme of emotional dislocation is the most prominent in this collection of testimonials. The writers express a spectrum of emotions that converge on the central feelings of grief and loss. In every occasion that these writers allow their emotions to surface, become vulnerable, and let go of emotions in their raw form, that very instance is authenticity. For instance, Editha Burgos articulates her loss through a haunting sense of numbness that eliminates her ability to express her pain. Her poem "Prime of Freedom" captures the struggle of a mother burdened by the weight of unarticulated sorrow, powerfully reflecting her emotional state and deep longing (2009, p.133):

I want to pray
But what do I say?
What do I ask for
While prostrate on the floor?

Similarly, Belet Batralo's poignant expression of prolonged agony in her poem "Pag-Asa sa Buhay" captures her unyielding longing for her brother, emphasizing that the pain of loss is a relentless, all-consuming presence. Her raw, heartfelt lines convey an authenticity rooted in lived experience (2009, p.122):

Yakap ang hinanakit
Pagkawala mong pilit
Sa didbdib ay may galit
Ang sa iyo'y mga dumagit.

Tales of haunting memories, as depicted by Coni Empeno in "Para sa Iyo, Anak," describes the pervasive nature of grief in the nightly musings of a mother longing for her missing daughter. The authenticity in Empeno's voice conveys the painful intersection of personal and familiar trauma, showcasing how the night amplifies her grief (2009, p.156):

Sa tuwing sasapit ang aking pagtulog
luha at hinagpis ang siyang bumabalot…
Sa buong magdamag mga mata'y dilat
ang dilag na anak sa isipa'y yakap.

The bereaved family members deliver the most authentic expressions that give face to the unbearable suffering they have agonized over since the disappearance of their lost ones. The most excruciating is losing two. When Elizabeth Calubad lost both husband Rogelio and son Gabriel in a forced abduction, she was reeling from hopelessness. In desperation, she wrote in "Mahal Ka Namin" (2009, p.166): "Ako ay nasa isang madilim na silid./Walang anumang liwanag na naaninag ang aking mata." In the same manner, Nuki Calubid (2009, p.172) wrote a letter the same way his father, Prudencio, would have it worded if he were alive and sending them one. In "Liham ni Kahon", the message is simple but poignant. In this touching letter, Nuki compares the disappeared father to a 'jack in the box' who would appear when she least expects it. The father would have connected with them if only this was possible. Nevertheless, this connection will only happen if she feels him in her heart. He could be anytime and anywhere because of that unbreakable bond that connects him to them, which has no limiting dimension. (2009, p.172):

"Ako ay si Kahon. Naghihintay mahanap at mabuksan. Ako'y nakabalot sa gusto mo. Buksan mo lang ako para mahanap mo ang mga sagot na hinahanap mo. Ang espasyo ko sa loob ko ay mahahalagang bagay para lang sa iyo."

Similarly, the same tone of filial piety flows here as a son tenderly expresses his gratitude to his mother. Through the poem "Salamat", Mother Gloria is fondly remembered with gratitude by son Ipe Soco (2009, p.187):

Hindi ko na halos maalala
Kung kailan huling nabanggit ang mga salita
Mga katagang magpapakita
kung gaano ka sa akin kahalaga

Sa dilim ay aandap-andap
Tuloy pa rin sa paghahanap
Walang mahanap, walang mahagilap
walang ibang masabi kundi salamat

In a narrative titled "Obet", Shirley Pascual (2009) described her husband's life as a paradox. His life transformation was ascribed to his involvement in the organization. Or could it be that much of the organization had transformed because of his contribution? In the character sketch she made for her husband, she put:

Ang buhay niya mismo ang patunay na posible ang pagbabago hindi lamang sa lipunan kundi mismo sa mga taong nagsusulong ng pagbabago nito. Nawala man

si Obet at di muling babalik, mananatili sa akin na asawa niya at kasama ang naipunla niyang pagbabago sa sarili, sa aming pamilya at sa sambayanang nakikibaka. (250)

Through the themes of emotional dislocation and resistance, the authenticity of voice in the testimonial works for the Desaparecidos emerges as a critical element in understanding the complex dynamics of grief, struggle, and the fight for justice. By authentically sharing their stories, the authors document their personal experiences and contribute to a collective narrative that challenges oppression and calls for accountability. In doing so, they honor the memory of their loved ones while empowering their communities to resist and advocate for truth and justice. In the vibrant tapestry of these narratives, the authenticity of voice serves as both a profound reckoning with loss and a rallying cry for social change, capturing the enduring spirit of those who dare to remember and speak out.

Analyzing the Literary Craft and Expression of the Testimonial Narratives for Philippine Desaparecidos

Selected Tropes Used in Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos

During the series of workshops, the facilitators require the contributors to think of a safe space in which they feel secure, free, comfortable, and happy. This initial process leads the participants to conceive tropes that best describe their situation. Some have responded by giving in to their personal concerns, while some relate their safe space to their Desaparecidos. Romy Ancheta, having his disappeared brother Leopoldo in mind, came up with "home" as his safe space; Belet Batralo, felt the "flag" meaningfully captures her idea of a safe space or place; Editha Burgos thought not for herself but for son Jonas' fascination for the "full moon" which perhaps may suit to his idea of a safe space; Linda Cadapan felt "hug" represents her safe space for missing daughter Sherlyn; Coni Empeno chose "book" as an all time companion; "Nature" is a safe refuge for Lisa Calubad while Nuki Calubid pick "box" for its association with the missing father; Ipe Soco saw "pencil" as his reliable companion to his search for mother Gloria; Criz Hizarsa looked at the "beach sand" as a place to go for her and husband Abner; Ghay considered the "frying pan" as both her stronghold and quickfix; For Lolit Robinos, the "television" is the harbinger of truth and therefore gives her the needed calm; Aya Santos, the daughter of desaparecido Leo Santos, wished she were a free as a "bird."

The tropes created by the contributors to the testimonial literature for the Desaparecidos illuminate profound layers of emotional depth and significance. Each selected metaphor not only embodies the personal experiences of loss but also conveys broader thematic elements that resonate within the collective memory and identity framework. The analysis reveals how these metaphors serve as vessels for expressing grief, longing, and resilience while simultaneously creating a sense of shared experience among those affected by enforced disappearances.

Tropes for Emotional Resonance and Personal Connections

The metaphors reveal the nuanced ways in which individuals process their grief and longing for their loved ones. For instance, Romy Ancheta's metaphor of "home" evokes a fundamental human longing for security and belonging, which is shattered by his brother's absence. It highlights the emotional void created by disappearance and the struggle to reclaim that sense of safety in a reality marred by loss. Similarly, Linda Cadapan's use of "hug" encapsulates the deep yearning for connection and affection, underscoring how such physical gestures are imbued with emotional significance when a loved one is missing.

Moreover, metaphors like Belet Batralo's "flag" and Ipe Soco's "pencil" illustrate how personal mourning intersects with collective activism. The flag serves as a symbol of hope, identity, and a commitment to justice, embodying the struggle against oppression faced by individuals and communities. As a tool for expression, the pencil highlights the transformative power of writing in confronting grief and preserving memory, emphasizing that personal narratives contribute to a larger narrative of resistance.

Symbolism of Nature and Everyday Objects

The metaphors of nature and everyday objects—such as "nature," "frying pan," and "television"—serve as anchors that help individuals navigate their emotional landscapes. As a symbol of refuge and renewal, nature offers solace amid the chaos of loss, suggesting that healing and beauty coexist with grief. The frying pan, representing domesticity and nourishment, evokes the routines and practices that connect individuals to their loved ones and provide emotional sustenance.

In contrast, Lolit Robinos' "television" symbolizes the quest for truth and the need for awareness concerning the disappeared. It emphasizes the role of media and information in shaping public understanding and fostering a sense of accountability, thus linking personal experiences to broader societal issues. This connection between

the personal and the public underscores the importance of storytelling in creating awareness and driving collective action.

Tropes for the Thematic Elements of Freedom and Resistance

The metaphors also explore themes of freedom and resistance, particularly in Aya Santos' longing to be a "bird." This imagery captures the desire to transcend the pain of loss and gain liberation from grief. It symbolizes a yearning for reconciliation with the past and the hope for a future free from suffering. Such expressions remind us that the quest for justice and closure is intertwined with the longing for personal freedom.

Overall, the tropes created by these writers become a powerful expression of individual and collective struggles, transforming personal grief into broader themes of identity, resistance, and action. The contributors' selected symbols foster a deeper understanding of the impact of enforced disappearances on families and communities, emphasizing the significance of memory in the ongoing fight for justice. Through their evocative metaphors, these writers honor their missing loved ones and contribute to a larger narrative that seeks to keep their stories alive and visible within the collective consciousness.

Literary Expression: Diction, Tone, Narrative Structure of Testimonial Literature

In order to make the participants write, they were involved in a workshop that subjected them to a specific set of activities that served as a stimulus to trigger emotional responses. This workshop procedure was applied to all of them, which makes it no surprise that the outputs are almost the same. This is not to exclude the fact that they have the same context, experience, dilemma, and political and social background, so their testimonial works read all the same. So, the similarity in their works is really expected.

In the testimonial texts of Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos, emotionally charged words convey feelings in a direct and impactful way. Words like "loss," "grief," "hope," and "love" are straightforward yet heavy with meaning, allowing readers to grasp the depth of the authors' emotions without ambiguity. Even simple words can create vivid mental images that evoke strong emotional responses. For instance, phrases like "cold night" or "empty chair" can elicit feelings of sadness and longing through their evocative power. Dee Ayroso put her longing in a simple but very touching wish (78): Alam kong habang tumitingala ako sa gabi, makikita pa rin kita habang nagbibigay tanglaw ka mula sa

itim na kalangitan, kasama ng iba pang mga sulo na naging mga tala na ang liwanag ay tumatagos sa walang hanggan.

The family of James Balao has never ceased in hoping for his appearance: Still searching, still not knowing. But the silence and the brick walls will never rob us out of our faith and hope (2009, p.108)...Yet in the poem "Laban" by Belet Batralo (p.122), she confesses her vulnerability with the lines: Bakit ba ang pagtangis ay hindi maiwasan?/Tuwing naaalala, kahapong nagdaan/ Paghahanap ay hindi alam kung kailan/ Subalit hindi susuko, hanggang matagpuan. In an open letter for husband Leo, Elizabeth Principe's fierce words resonate with a message hard to ignore (p.286): Ang magbuhos ng dugo para sa bayan ay kagitingang hindi malilimutan. Ang katawang inialay sa lupang mahal, mayaman sa aral at kadakilaan.

Using simple yet emotionally charged words in testimonial literature enhances the narratives' clarity, authenticity, and emotional power. This choice of language allows writers to communicate profound experiences and feelings, fostering a deeper understanding and connection with their audiences. By prioritizing accessibility and emotional resonance, testimonial literature becomes a powerful means of sharing personal stories and communal struggles, ultimately contributing to social awareness and change.

Testimonial writings often reflect personal experiences and authentic voices. Since these testimonial works are creative outputs from a workshop, it is not as if simplicity is imposed upon them. The writing has become simple and straightforward because they all possess the voice of authenticity because of the kind of experience they have been through. Their simple language enhances their narrative's sincerity, allowing them to express raw emotions without being overshadowed by elaborate vocabulary or complicated structures. This authenticity resonates deeply with readers, fostering empathy and connection.

Finally, a testimonial work that uses simple, emotionally charged words can evoke a sense of shared humanity. Readers are more likely to empathize with the author's experiences when they can easily grasp the emotions being expressed, leading to a stronger emotional bond. In the case of this anthology, Pagtatagpo sa Kabilang Dulo: Panitikang Testimonial ng Desaparecidos, the outputs of the writers often deal with complex and multifaceted emotions. Had it been written with superfluous language, the complex emotions would not have made sense because they would have become excessively dramatic or sentimental. Simple language can effectively convey these complexities by distilling intricate feelings into relatable terms, making the emotional burdens of the experiences more tangible for readers.

Conclusion

The exploration of testimonial literature concerning the Desaparecidos offers a profound insight into the lived experiences shaped by enforced disappearances of the Desaparecidos. By delving into these texts, we uncover the poignant language, structure, and literary techniques that give voice to experiences steeped in trauma and loss. A recurring theme prominently featured in these narratives is emotional dislocation, which emphasizes the profound grief that permeates contributors' stories, underscoring the personal toll of such tragedies. This anthology serves as a powerful platform, illuminating the pain of loss and the relentless pursuit of truth and connection by families grappling with these heart-wrenching experiences. Beyond individual sorrow, these works illustrate the collective trauma that arises from enforced disappearances. They weave narratives of resilience, where contributors rise against the backdrop of impunity, advocating fervently for justice and accountability. Each testimonial encapsulates a spirit of hope and determination, enriching the overall narrative of the Desaparecidos and illustrating a collective struggle against systemic oppression.

In the "Pagtatagpo sa Kabilang Dulo" workshops, participants were inspired to reflect on their own safe spaces, which led to the creation of evocative metaphors that convey their profound grief and longing for absent loved ones. These metaphors go beyond personal expression; they connect individual mourning to broader themes of identity and collective action, enhancing our understanding of the significant impact that enforced disappearances have on families and communities. The language in these testimonials is strikingly emotive, characterized by simple yet powerful words such as "loss," "grief," and "hope." This choice of diction constructs a vivid emotional landscape that resonates deeply with readers. The clarity and authenticity of the straightforward language allow for genuine emotional expression, fostering empathy and creating connections between personal experiences and larger societal narratives.

Ultimately, the testimonial literature emerges as a crucial medium for raising social awareness and inspiring change. It honors the memories of those who have disappeared while advocating for justice and truth, ensuring their stories remain alive in the collective consciousness. Through these narratives, we are reminded of the strength found in shared sorrow and the relentless quest for healing and justice amidst adversity

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Climate Change Awareness and Mitigation Strategies among Students and Residents of Bulacan, Philippines: A Socio-Educational Perspective

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Abstract

This study assessed climate change awareness, accessibility to climate information, and knowledge of mitigation strategies among students and residents in selected municipalities of Bulacan. Using a descriptive quantitative design, data were gathered from 1,601 students of Bulacan State University–Bustos Campus (during 2nd semester of 2023–2024) and 214 residents. Respondents were selected through random and voluntary sampling using a Google Form-based survey. Results revealed no significant differences based on gender, area of residence, and family income of the respondents. However, significant differences were observed among students in terms of climate change awareness, accessibility to information, and mitigation strategies. Among residents, only accessibility to information showed significant differences; awareness and mitigation strategies did not. Both groups were generally aware of climate change and its mitigation, with moderate access to information. Given the disparities in information accessibility, the study recommends continued integration of climate-related topics in the curriculum and strengthening extension programs to improve public awareness and response to climate issues in Bulacan.

Keywords: *Awareness, Climate Change, Information, Mitigation*

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Introduction

Climate change is one of the most complex, urgent, and pressing challenges confronting humanity in the 21st century. It has become a significant threat to international peace, public health, and global stability—disrupting ecosystems, exacerbating socio-economic inequalities, and increasing the frequency and severity of natural disasters (IPCC, 2023). It is the defining crisis of our time, happening even more quickly than we feared (UN, 2020). Defined by long-term shifts in temperature, precipitation, and other atmospheric conditions, climate change is driven primarily by human activities such as the burning of fossil fuels, deforestation, and industrial agriculture (Abbass et al., 2024; UN, 2024).

The world is now warming faster than at any point in recorded history. Warmer temperatures over time are changing weather patterns and disrupting the usual balance of nature. This poses many risks to humans and all other life forms on Earth. The effects of climate change heighten competition for resources such as land, food, and water, fueling socio-economic tensions and, increasingly often, leading to mass displacement. Among the most important effects of climate change are hotter temperatures, more severe storms, increased drought, warming, rising oceans, loss of species, insufficient food, more health risks, poverty, and displacement (UN 2024).

The primary driver of climate change is the increase in greenhouse gas (GHG) emissions, most notably carbon dioxide, methane, and nitrous oxide. These gases are produced mainly by burning fossil fuels for energy and transportation, deforestation, and industrial agriculture (UNEP, 2024). Everyday human activities—how people consume energy, travel, produce food, and manage waste—contribute to the steady buildup of these gases in the atmosphere. Alarmingly, studies have shown that a significant portion of emissions comes from individual consumption and household behavior, especially in wealthier nations and communities (UNDP, 2024).

Climate change does not affect all communities equally. Vulnerable populations—especially in developing countries like the Philippines—are more likely to suffer from its impacts due to limited adaptive capacity and resource access. The variability of rainfall caused by climate change has significantly impacted the country, especially in the agriculture sector. The study of Agbay, V. C. A., Sanchez, P. A. J., Camus, D. R. D., Aquino-Cando, J. O., Barroga, E. M. N., & Velasco, A. B. (2023) stated that local farmers from Angat, Bulacan, Philippines had been affected by drought causing their crop production decreased for more than 50% of their usual harvest. Most farmers have experienced the effects of floods, especially those near the Angat River, where overland flow occurs. Aside from damaged infrastructures and

properties, they also experienced water-borne diseases like diarrhea and skin infections.

In this context, education serves as a transformative force and can be a powerful tool in addressing and enabling effective adaptation to climate change. Higher education institutions (HEIs) are uniquely positioned to shape environmentally literate and socially responsible citizens through curriculum development, community outreach, and research initiatives (Feinstein & Mach, 2019). Education plays an important role in changing people's behavior, values, and attitudes. Young people in the classrooms can learn about the impacts of climate change and how to mitigate and adapt to it. They can be motivated to act and support environmental sustainability (UNESCO, 2022). Universities can serve as innovation hubs—generating knowledge, piloting solutions, and disseminating climate adaptation strategies to the students and nearby communities. As Rosales (2024) mentioned in his study, the curriculum will impart knowledge about climate change and foster a sense of responsibility and stewardship among students.

Everyone, especially college students, has a role and part to play in the fight against climate change. Many young adults nationwide want to get involved but do not know how (American Forests, 2020). Students, in particular, play a vital role in this transformative process. They can be part of the solutions to reducing greenhouse gas emissions. They are the ones who can tell people in the community about the technologies that would reduce the number of greenhouse gases being added to the atmosphere, actions to be taken to save energy and slow climate change and explore ways people can prepare for climate change (Agboola and Emmanuel, 2016). As future leaders and active members of society, they can advocate for sustainability, model responsible behavior, and influence community action (American Forests, 2020). However, meaningful participation requires that students and residents alike be equipped with adequate awareness, accurate accessibility to information from different sources, and practical knowledge of climate change mitigation and adaptation strategies. As Agboola and Emmanuel (2016) emphasized, fostering climate literacy at the grassroots level enhances the capacity for collective climate action.

Most importantly, the issue of climate change calls upon governments, global citizens, and international organizations to take urgent and meaningful research and actions to mitigate the risk of climate challenges, encouraging stakeholders to collaborate and proactively on mitigation and adaptation programs (South Asia Disasters, 2024).

This study was conducted to evaluate the climate change awareness of students from Bulacan State University–Bustos Campus and residents from selected municipalities in Bulacan, Philippines. It aims to determine their level of access to climate-related information and identify the mitigation practices they are familiar with or currently applying. By evaluating these factors, the research intends to inform the development and integration of responsive climate change educational programs, extension activities, and community-based interventions. Ultimately, the research aspires to cultivate and build more informed and proactive citizens, supporting local sustainability and global environmental goals. Educating the students and the residents through assessment of their climate change awareness, investigating their access to information on climate change, and identifying and developing mitigation and adaptation strategies in coping with climate change is very timely and vital to make the students and the community where they are living more informed in decisions making sustainable changes in the behavior and lifestyle.

It is our planet, and while we recognize that it is currently in crisis, we also understand that viable solutions are within reach. Significant progress is already underway, including the expansion of green energy and the strengthening of food security. The benefits of these efforts are evident in creating green jobs, improving air quality, and developing more resilient and sustainable economies (United Nations, 2024).

Methodology

This study employed descriptive quantitative research design. Descriptive research can be quantitative, as it involves collecting numerical data to statistically analyze a population sample's characteristics. Such data helps reveal patterns, relationships, and trends over time and are commonly gathered using tools such as surveys, polls, and experiments (Heath, 2023).

This research aimed to assess the level of climate change awareness and determine the influence of variables such as family monthly income, gender, and area of residence among students of Bulacan State University–Bustos Campus and residents from selected municipalities of Bulacan. The study also examined the accessibility of climate change-related information and evaluated the respondents' knowledge of mitigation strategies to identify areas for development to strengthen adaptation and coping mechanisms in response to climate change.

The respondents of the study included 1,601 students enrolled at Bulacan State University–Bustos Campus during the second semester of the academic year 2023–2024 and 214 residents from selected municipalities in Bulacan province. The student

was drawn from ten academic programs, namely: Bachelor of Elementary Education (BEEd), Bachelor of Secondary Education (BSEd), Bachelor of Technology and Livelihood Education (BTLEd), Bachelor of Physical Education (BPEd), Bachelor of Science in Information Technology (BSIT), Bachelor of Industrial Technology (BIT), Bachelor of Science in Computer Engineering (BSCE), Bachelor of Science in Industrial Engineering (BSIE), Bachelor of Science in Entrepreneurship (BSE), and Bachelor of Science in Business Administration (BSBA).

The community respondents resided in various municipalities of Bulacan, specifically Bustos, Baliwag, Angat, San Rafael, Pulilan, and Plaridel. A combination of random and voluntary sampling methods was employed to select both students and residents. Participation was facilitated through a Google Form-based survey.

To gather the necessary data, this study adapted validated instruments. The questionnaire developed by Agboola and Emmanuel (2016) on Awareness of Climate Change and Sustainable Development among Undergraduates from two selected universities in Oyo State, Nigeria, served as a model for assessing climate change awareness, access to climate change information, and knowledge of mitigation strategies among the respondents.

The questionnaire consisted of 25 items related to the concept of climate change and 17 items pertaining to sources of climate-related information. To further assess mitigation-related knowledge and perceptions, this study also utilized a validated instrument from Pitpitunge (2013) titled Students' Perceptions about Climate Change, which included 15 statements focusing on strategies to mitigate the effects of climate change.

The data collected on climate change awareness and mitigation strategy knowledge were analyzed using frequency counts and mean scores based on a 5-point Likert scale. The descriptive statistical results were summarized and interpreted according to predefined scale descriptions presented in Table 1.

Table 1. Level of Climate Change Awareness

Scale	Range	Description
5	4.51- 5.00	Very Aware
4	3.51- 4.50	Aware
3	2.51-3.50	Moderately Aware
2	1.51- 2.50	Less Aware
1	1.0-1.50	Not Aware

Accessibility to sources of information on climate change was analyzed using frequency and mean statistics based on responses collected through a 5-point Likert scale, as shown in Table 2.

Table 1. Level of Climate Change Awareness

Scale	Range	Description
5	4.51- 5.00	Very accessible
4	3.51- 4.50	Accessible
3	2.51-3.50	Moderately Accessible
2	1.51- 2.50	Poorly accessible
1	1.0-1.50	Not accessible

The Independent Samples t-test was employed to determine whether there were statistically significant differences between two unrelated groups—in this case, the respondents' gender and area of residence—in relation to their climate change awareness, knowledge of mitigation strategies, and access to information.

In addition, a One-Way Analysis of Variance (ANOVA) was utilized to compare the means of more than two independent groups to determine significant differences. Specifically, the ANOVA was applied to examine whether respondents' family monthly income, as well as the academic programs of students and the municipalities of the residents, were significantly associated with variations in climate change awareness, accessibility to climate information, and familiarity with mitigation strategies. These statistical analyses helped identify group-based disparities in the key variables under study across the selected population in Bulacan, Philippines.

Results and Discussion

The following tables present the mean results obtained from respondents regarding climate change awareness, accessibility to climate change information, and awareness of mitigation strategies.

Table 3 assessed the level of climate change awareness among BulSU-Bustos students. The grand mean of 4.44 indicated that the students were generally "Aware" of climate change. Analyzing the mean scores across different academic programs revealed that BSEd students had the highest mean score of 4.56, while BIT students had the lowest mean score of 4.24 on climate change awareness. Students were considered "Very Aware" of key survey items, such as the fact that climate change is happening, that they are already experiencing its impacts, and that it requires immediate and urgent attention. Additionally, they recognized that climate change

poses a threat to sustainable development and contributes to increasing surface temperatures.

Table 3. Students Awareness on Climate Change

Rank	Program	Mean Score	Interpretation
1	BSED (Secondary Ed.)	4.56	Very Aware
2	BPED (Physical Ed.)	4.54	Very Aware
3.5	BS Entrepreneurship	4.49	Aware
3.5	BSBA (Business Admin)	4.49	Aware
5.5	BEED (Elementary Ed.)	4.43	Aware
5.5	BTLED (Tech-Livelihood)	4.43	Aware
5.5	BSCPE (Comp. Eng'g)	4.43	Aware
5.5	BSIE (Ind'l Eng'g.)	4.43	Aware
9	BSIT (Info Tech)	4.37	Aware
10	BIT (Ind'l Tech)	4.24	Aware

Table 4 assessed the climate change awareness of residents in selected municipalities of Bulacan. The grand mean of 4.38 indicated that residents were generally "Aware" of climate change issues. Analyzing the mean scores across municipalities, it was found that residents of Pulilan had the highest mean score of 4.50, while residents of Bustos had the lowest mean score of 4.25 on climate change awareness.

The survey results showed that residents were "Very Aware" of several key points: climate change is occurring; they are already experiencing its impacts and there is an urgent need for immediate action; climate change poses a threat to sustainable development and contributes to rising surface temperatures; and climate change increases the intensity of extreme weather events such as heat waves, tornadoes, hurricanes, and heavy rainfall.

Table 4. Residents by Municipality Awareness on Climate Change Awareness

Rank	Municipality	Mean Score	Interpretation
1	Pulilan	4.50	Very Aware
2	San Rafael	4.42	Aware
3	Plaridel	4.41	Aware
4	Angat	4.36	Aware
5	Baliwag	4.33	Aware
6	Bustos	4.25	Aware

The students and residents in the nearby municipalities accessed four main sources of information on climate change: Education, Media and Home, Seminars and

Workshops, and Information Technology. Table 5 presents the accessibility of these information sources specifically for the students.

Table 5. Accessibility of the Students to Climate Change Information

Rank	Program	Mean Score	Interpretation
1	BPED (Physical Ed.)	3.55	Accessible
2.5	BSED (Secondary Ed.)	3.43	Accessible
2.5	BSBA (Business Admin)	3.43	Accessible
4	BEED (Elementary Ed.)	3.38	Moderately Accessible
5	BS Entrepreneurship	3.34	Moderately Accessible
6	BTLED (Tech-Livelihood)	3.29	Moderately Accessible
7	BSIT (Info Tech)	3.28	Moderately Accessible
8.5	BSIE (Ind'l Ed.)	3.30	Moderately Accessible
8.5	BSCPE (Comp. Eng'g)	3.30	Moderately Accessible
10	BIT (Ind'l Tech)	3.22	Moderately Accessible

The overall mean of 3.35 indicated that students could "Moderately Access" information on climate change from the four identified sources. This suggests that while students gained knowledge about climate change, the extent of their access was moderate. Analysis of the survey responses showed that documentaries on television and information from the Internet and World Wide Web received the highest mean scores, with 3.52 and 3.58, respectively, both described as "Accessible." Conversely, the lowest mean scores were recorded for school pamphlets and reading materials, seminars/workshops, and excursions/field trips among students from different programs. Among the programs, BPEd students had the highest mean score of 3.55, classified as "Accessible," while BIT students had the lowest mean score of 3.22, described as "Moderately Accessible."

On the other hand, Table 6 presents the accessibility of climate change information sources among residents in selected municipalities. The grand mean of 3.38, also described as "Moderately Accessible," indicates that residents accessed climate change information from various sources to a limited extent. The highest-rated sources were the Internet and World Wide Web, and multifunctional mobile phones, with mean scores of 3.55 and 3.51, respectively, both described as "Accessible." The

lowest mean scores were from school pamphlets and reading materials, excursions/field trips, and seminars/workshops related to climate change issues.

Table 6. Accessibility of the Residents to Climate Change Information

Rank	Municipality	Mean Score	Interpretation
1	Pulilan	3.51	Accessible
2	Baliwag	3.42	Accessible
3	Plaridel	3.39	Moderately Accessible
4	San Rafael	3.37	Moderately Accessible
5	Angat	3.34	Moderately Accessible
6	Bustos	3.22	Moderately Accessible

It was found that residents of Pulilan municipality had the highest mean score of 3.51, while residents of Bustos municipality had the lowest mean score of 3.22 in terms of accessibility to climate change information.

BulSU-Bustos students were found to be "Very Aware" of the four key mitigation and adaptation strategies items in the survey questionnaire. These items included the role of tree planting in carbon dioxide sequestration, the contribution of recycling practices to mitigating climate change impacts, the reduction of harmful gases through recycling materials, and the avoidance of plastics by reusing bags and bottles. Additionally, students expressed being "Aware" of the remaining twenty-six items regarding mitigation and adaptation strategies.

The lowest mean scores among these strategies were related to the use of biofuels such as ethanol and other renewable energy alternatives (as outlined in RA 9367), the shift in livelihood from fishing to farming among people in coastal areas, awareness that certain paper products, like paper bags, do not produce greenhouse gases even when burned; recycling of materials that do not emit carbon dioxide; and the practice of placing endangered species in sanctuaries.

These five strategies represent areas that can serve as a foundation for developing more targeted activities to promote deeper insights and enhance students' awareness on effective ways to mitigate climate change.

From Table 7, the grand mean of 4.35 indicated that students were generally "Aware" of mitigation and adaptation strategies for climate change. Students from the BSEd, BPEd, and BSBA programs obtained the highest mean scores regarding their awareness of these strategies, while students from the BIT program recorded the lowest mean scores.

Table 7. Awareness of the Students on Climate Change Mitigation Strategies

Rank	Program	Mean Score	Interpretation
1	BSED (Secondary Ed.)	4.44	Very Aware
1	BPED (Physical Ed.)	4.44	Very Aware
1	BSBA (Business Admin)	4.44	Very Aware
4	BEED (Elementary Ed.)	4.38	Very Aware
5	BSIE (Ind'l Ed.)	4.36	Very Aware
5	BSCPE (Comp. Eng'g)	4.36	Very Aware
7	BSIT (Info Tech)	4.29	Very Aware
8	BTLED (Tech-Livelihood)	4.37	Very Aware
9	BS ENTREPRENEURSHIP	4.31	Very Aware
10	BIT (Ind'l Tech)	4.15	Aware

Table 8 presents the awareness of residents in the nearby municipalities concerning climate change mitigation and adaptation strategies. The grand mean of 4.28 signified that residents were "Aware" of the various strategies to cope with climate change. Analysis of the survey responses revealed that certain mitigation strategies received lower mean scores, including shifting livelihoods from fishing to farming for coastal communities; promotion by the Philippine government of biofuels like ethanol and other renewable energy sources and natural gas (RA 9367); understanding that recycled materials do not produce carbon dioxide; recognizing that paper products such as paper bags do not emit greenhouse gases even when burned; and the practice of collecting endangered species and placing them in sanctuaries.

Although these strategies were categorized as "Aware," there is potential for further development through activities, seminars, and training to raise the residents' level of understanding and engagement with mitigation efforts. Notably, only one item was rated "Very Aware": the mitigation strategy involving tree planting activities that aid carbon dioxide sequestration. The remaining twenty-nine items received an "Aware" rating.

Table 8 also showed that residents of Pulilan municipality had the highest mean score regarding awareness of climate change mitigation strategies. In contrast, residents of Bustos municipality had the lowest mean score in this regard.

Table 8. Awareness of the Residents on Climate Change Mitigation Strategies

Rank	Municipality	Mean Score	Interpretation
1	Pulilan	4.48	Very Aware
2	San Rafael	4.33	Very Aware
3	Plaridel	4.32	Very Aware
4	Angat	4.28	Very Aware
5	Baliwag	4.18	Aware
6	Bustos	4.11	Aware

In this study, the gender of students from different programs and residents from nearby municipalities was assessed in relation to their awareness, mitigation practices, and sources of information on climate change using an independent samples t-test. This analysis aimed to determine whether there were significant differences based on gender in both groups (ASC, 2025). A p-value less than 0.05 from the t-test indicates statistical significance.

The results showed that the p-values for awareness, mitigation, and sources of information were 0.211, 0.067, and 0.235 respectively. Since all p-values exceeded the 0.05 threshold, it was concluded that there is no significant difference between males and females in both the student and resident groups regarding their climate change awareness, mitigation practices, and access to information.

Table 9. Significant Difference with respect to Gender of the Respondents

		Statistics	**p**
Awareness	Mann-Whitney U	135785	0.211
Mitigation	Mann-Whitney U	132852	0.067
Source of Information	Mann-Whitney U	136112	0.235

Note. H_a μ Female ≠ μ Male

Table 10 shows the p-values obtained for respondents' area of residence (rural or urban) in relation to the variables studied, which were 0.052, 0.782, and 0.315, respectively. At the 0.05 level of significance, these results indicate that there is no significant difference based on area of residence among the respondents.

Table 10. Significant Difference with respect to Area of Residence

		Statistics	**df**	**p**
Awareness	Student's t	1.944	1067	0.052
Mitigation	Student's t	-0.277	1067	0.782
Source of Information	Student's t	1.006	1067	0.315

Note. H_a μ Rural ≠ μ Urban

Table 11 assessed whether family monthly income had a significant effect on the climate change awareness of the respondents. The obtained p-values were 0.725, 0.734, and 0.716, all of which exceed the 0.05 level of significance. Therefore, it was concluded that family monthly income had no significant difference on the respondents' climate change awareness.

Table 11. Significant Difference with respect to Family Monthly Income

	F	df1	df2	p
Awareness	0.567	5	114	0.725
Mitigation	0.555	5	111	0.734
Source of Information	0.578	5	113	0.716

The students of BulSU-Bustos campus were enrolled in ten programs. Using One-Way Anova, the students were assessed in terms of their awareness to climate change, accessibility to climate change information and knowledge in mitigation strategies. Table 12 described the significant difference of the students with respect to the given areas. It was observed that with the p-value of 0.002 in awareness, <.001 in mitigation and 0.018 in source of information, all were below in the significant level of 0.05. Therefore, there is "Significant difference" among students under different programs.

Table 12. Significant Difference of the Students regarding awareness of climate change, access to information sources, and knowledge of mitigation strategies

	F	df1	df2	p
Awareness	3.13	9	144	0.002
Mitigation	5.99	9	143	< .001
Source of Information	2.32	9	143	0.018

Regarding the residents, Table 13 shows the p-values for the assessed mean scores on climate change awareness, mitigation, and sources of information across different municipalities. The results indicate that only accessibility to climate change information demonstrated a significant difference among residents from different municipalities. In contrast, no significant differences were observed in terms of awareness and mitigation practices among the residents.

Table 13. Significant Difference of the Residents regarding Awareness of Climate Change, Access to Climate Change information sources and knowledge of climate change mitigation strategies

	F	df1	df2	p
Awareness	1.72	5	445	0.128
Mitigation	1.88	5	446	0.096
Source of Information	3.05	5	444	0.010

Climate change and sustainability education should provide personally relevant and meaningful content, employing active and student-centered teaching approaches that empower children and young people. It should also incorporate

participatory and creative methods drawn from multiple disciplines, addressing the scientific, social, ethical, and political complexities involved (Rushton et al., 2023).

The concept of global citizenship education is defined as education that enables learners, regardless of age, to take active roles both locally and globally in building more secure, inclusive, nonviolent, and tolerant societies (Leite, 2022). Within university and community settings, a global citizen is expected to adopt educational approaches and initiatives that disseminate knowledge about the impacts of climate change. This encourages young people to develop the knowledge, skills, and values necessary to engage meaningfully with the world and contribute to a sustainable future for all.

Conclusion

This study revealed that both students of Bulacan State University–Bustos Campus and residents from selected municipalities of Bulacan are generally aware of climate change issues and the corresponding mitigation and adaptation strategies. Their access to climate change information is moderate, sourced from formal education, media, home discussions, seminars and workshops, and digital platforms.

No significant differences in climate change awareness, access to information, or mitigation strategies were observed based on gender, area of residence, or family monthly income from both students and residents. However, significant differences were found among students from different academic programs in terms of awareness, access to information, and mitigation strategies. Among residents, only access to information showed significant variation; awareness and mitigation practices were similar across groups.

In light of these findings, the study recommends continuous integration of climate change topics and mitigation strategies into academic curricula to strengthen students' awareness and understanding. It also encourages promoting digital literacy and expanding access to reliable climate change information through online platforms and social media for both schools and communities. Developing and facilitating community-based climate action projects—such as tree planting, waste reduction campaigns, recycling initiatives, energy efficiency programs, and creative activities like poster and slogan making—are highly encouraged. Extension programs and seminars focused on "Climate Change Awareness and Mitigation Strategies" should be implemented to enhance knowledge and active participation among students and residents. Lastly, similar studies should be conducted in other municipalities of Bulacan to gather broader insights for targeted interventions.

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Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Heritage for the Future: Harnessing Stories of a State University Historical Sites for Achieving Promotion and Development

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Abstract

This research delves into the descriptions and stories and the extent of the characteristics of the sites of Central Philippines State University-Main Campus, Philippines, addressing the defacing and vanishing structures within the school. There are 11 informants involved in the study through snowball sampling. Using a mixed method, this study presented qualitative data for the narratives of the descriptions and stories of sites through a researcher-made questionnaire and quantitative data for the extent of characteristics of the sites through an adapted questionnaire from the Tourism Guidebook for Local Government Units with the parameters as to uniqueness and appeal, educational/economic /historical/cultural value, accessibility, availability of basic utilities, and availability of onsite facilities, using the Likert Scale measurement criteria of 1-not evident, 2-slightly evident, 3-fairly evident, 4-quite evident, and 5-very evident. The findings revealed fourteen (14) well-known sites situated at the perimeter area of Central Philippines State University. The descriptions and stories of the historical sites vary according to their structure and the narration of the informants. As gleaned from the findings, the strength of the sites was in the educational, economic, historical, and cultural values, which were marked as quite evident. The uniqueness and appeal were quite evident. The accessibility of the historical sites and the availability of basic utilities were slightly evident. The onsite facilities are not evident. The historical sites, in general, possess fairly evident characteristics. Hence, there is a need to create a site development framework for their promotion and development.

Keywords: *development, heritage, historical sites, promotion, stories*

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Introduction

Historical sites are unique symbols of the identity of the people. The tangibles are the history of the people's voice into the present and the future. Stories are told about the historical sites and how they became what they are, and that helps people understand who they are (Solomon et al., 2022). The turn of the millennium witnessed brutal attacks on the memory of man. The era of globalization and modernization, where development phenomena insidiously create the erosion of cultural heritage (Zerrudo, 2019).

Like any other place in the country, Central Philippines State University-Main Campus, a public higher education institution in the Philippines, has rich sites throughout history. However, some sites were defaced in structure, while others had already vanished in the school. Hence, preserving those sites can be important to building a healthy community.

Numerous research studies have explored preserving and promoting heritage sites, often focusing on cultural sensitivity, conservation efforts, and community empowerment. For instance, Mekonnen et al. (2022) investigated the practices and challenges associated with cultural heritage conservation, while Semwal (2024) emphasized the importance of cultural sensitivity in heritage site management, highlighting its role in preserving cultural authenticity and enhancing visitor experiences. Building on these foundations, the present study aims to examine the descriptions, narratives, and defining characteristics of historical sites within the school setting. The objective is to encourage greater public engagement with these dynamic heritage spaces and to inform the expansion of existing programs for their promotion and preservation. This includes an in-depth exploration of current initiatives and strategies to sustain these sites' cultural and historical value.

Guided by the national agenda of the Philippines for heritage preservation to strengthen the conservation and protection of national cultural heritage through legislation and education, as well as promoting community-based heritage initiatives, complementary to the global agenda driven by Sustainable Development Goal 11 (SDG 11) for heritage preservation is centered on safeguarding both cultural and natural heritage, recognizing their significance for cultural identity, sustainable development, and future generations, this study will create a plan for the enthusiasm and escalation growth of the framework to demonstrate the potential for harnessing heritage to assist in achieving sustainable development. This study will serve as a wake-up call and an eye-opener for Central Philippines State University to develop and promote its sites to the public so that stories remain a part of people's everyday lives.

Methodology

Research Locale

This study was conducted at Central Philippines State University (CPSU) – Main Campus, located in Barangay Camingawan, Kabankalan City, Negros Occidental, Philippines. The campus occupies a land reservation of approximately 4,653.7 hectares and is situated 19 kilometers from Kabankalan City and 17 kilometers from Mabinay, Oriental Negros. Strategically positioned at the heart of Negros Island, CPSU lies 108 kilometers from Bacolod City, Negros Occidental, and 97 kilometers from Dumaguete City, Oriental Negros. The campus is home to various historical sites, many of which have significant potential as tourist attractions.

Research Design

The study utilized a mixed-methods approach, incorporating both qualitative and quantitative research methods. The qualitative component aimed to capture rich, descriptive narratives of the historical sites, while the quantitative component was used to measure the extent of the sites' characteristics. Qualitative data were gathered through in-depth interviews with key informants, and quantitative data were collected via a structured survey questionnaire adapted from the Tourism Guidebook for Local Government Units.

Participants and Sampling Procedure

The key informants consisted of eleven (11) individuals who are long-time residents of the area within the CPSU Main Campus and retired institution personnel. All were aged 60 years and above and possessed first-hand knowledge of the historical sites. The researchers employed a snowball sampling technique, beginning with one identified informant who referred additional individuals deemed knowledgeable about the sites. Data saturation was reached with the eleventh informant, as recurring information and themes indicated that no new or significant insights were emerging. This confirmed that the sample size was sufficient to meet the study's objectives.

Data Analysis

Narrative analysis was used to process the qualitative data, focusing on the descriptions and oral histories of the sites as shared by the informants. For the quantitative data, the extent of the characteristics of the historical sites was assessed using a five-point Likert scale:

1 – Not evident
2 – Slightly evident
3 – Fairly evident
4 – Quite evident
5 – Very evident

Ethical Considerations

Informants' recruitment and participation were conducted strictly using ethical research practices. Given the advanced age of the participants, the researchers took special care to be respectful and considerate of their physical, emotional, and time-related needs. Written consent was secured prior to participation, and informants were thoroughly briefed on the study's purpose, procedures, and their rights as participants. Participation was entirely voluntary, with the option to decline to answer specific questions or to withdraw from the study at any point without any penalties or loss of benefits. Interviews were scheduled at the convenience of the informants, and their privacy and confidentiality were strictly maintained. All information provided was handled with transparency and free from coercion or misleading emphasis.

Results and Discussion

Descriptions and Stories of the Sites of Central Philippines State University-Main Campus

This section presents the description, narratives of the stories, analysis, and interpretation of the survey results conducted in the 14 sites in Central Philippines State University-Main Campus. It is divided into two topics: the site presented with photographs and their respective description and stories, and the extent of characteristics of the sites in tabular form.

The Old Administration Building

The Old Administration Building is situated approximately 800 meters northeast of the main gate of Central Philippines State University (CPSU), along Mango Avenue, directly opposite the College of Teacher Education Building. The structure, characterized by its two spacious rooms separated by a 10-foot-wide lobby extending 24 feet in length, originally featured a long-streamlined canopy on the eastern façade. Adjacent to this area was an annex known as the Administration Office. Prior to its construction, the site was occupied by a structure known as the Vo-Ag Building, which also housed the university library at the time.

The Old Administration Building was designed as a two-story edifice and served multiple administrative and academic functions. It housed key institutional offices such as the Superintendent's Office, Bookkeeper's Office, Auditor's Office, and the Farm Manager's Office—particularly after the original Farm Manager's Office deteriorated. In addition to its administrative use, the building accommodated six classrooms and was positioned beside the university clinic. Its strategic location also made it the site for official flag ceremonies, with the flagpole installed at the building's

front. The structure was built with galvanized iron roofing and cement flooring, and its original design remains largely intact to this day.

Over the years, the building evolved in its purpose. At one point, it functioned as the University Library. Today, it serves as the Historical and Cultural Heritage Center adjacent to the Accreditation Building, highlighting its enduring legacy in the university's institutional memory.

Photograph 1. Old Administration Building

Photo Credits to CPSU Planning Office

Photo Credits to the Historical and Cultural Heritage Center

Photo by: Mary Grace Noreen P. Leduna

According to key informants, Mr. Joanary Parcon and Mrs. Susan Parcon, both alumni of the former Negros Occidental National Agricultural School (NONAS) and graduates of the Bachelor of Science in Agriculture, the Old Administration Building was constructed between 1976 and 1977. Superintendent Mr. Agusto Bensan and Principal Mr. Arturo Landiza oversaw its development.

The building's role as a library is closely tied to the history of CPSU's librarianship. Ms. Majelende M. Khoyute served as the university librarian from 1975 until 1986 before taking a leave of absence to attend to personal matters in Iloilo City. Mrs. Sylvia Landiza assumed the role during her absence from 1986 to 1987. Briefly,

Ms. Rosalie Cacaldo also served as a librarian prior to transferring to what is now ISAT-U (Iloilo Science and Technology University).

Ms. Khoyute resumed her post in 1987 and continued until 1997. During this period, she married Mr. Nestor Alonzagay, a College Instructor and son of a former NONAS Administrator. Upon Mr. Alonzagay's passing, Ms. Khoyute (now Mrs. Majelende K. Alonzagay) eventually left the post once again. She was succeeded by Mrs. Thessa Muscasa, who served from 1997 to 2006 before leaving for work abroad. Subsequently, Mrs. Nenita Francisco, a science teacher, was designated acting librarian.

Since 2009, Mr. Julius R. Fetiluna has held the position of University Librarian and continues to serve in this role at the time of the study.

The Clemente Sports Complex

The Clemente Sports Complex is located approximately 800 meters north of the main gate of Central Philippines State University. It is situated in Purok Macasaet, now known as Purok CPSU I. The original structure of the Clemente Sports Complex was made of lumber. Although its structural design has since been modified, the current building remains patterned after the original. The roof was made of galvanized iron, and the floor was wooden. The gymnasium was also constructed from wood, and its original design featured extended structures called palayas on both sides. Inside, the gymnasium was surrounded by chairs.

Mr. Roberto Lescano Segura and Mrs. Columba Parcon Segura, both retired faculty members of NSCA and identified as informants number 3 and 4, explained that the Clemente Sports Complex was formerly known as the School Gymnasium. The site held great significance, as nearly all school activities were conducted there. Students were each assigned a plot of land to farm as part of their agricultural training. During harvest season, the gymnasium served as a shaded area for crop processing. It was commonly called the Corn Depot, where agricultural products were shelled and dried.

The Farm Manager would frequently suspend regular classwork so that students, particularly the girls, could assist in harvesting and processing their produce, allowing them to engage in and enjoy the fruits of their labor fully. An annual Corn Festival was held to encourage increased agricultural production among students.

The gymnasium was also utilized for convocations, programs, social gatherings, graduation ceremonies, and basketball games. It was renamed the Clemente Sports Complex sometime in 2002 in honor of Dr. Dominador D. Clemente, the first principal of NONAS (1946).

According to oral accounts, before the gymnasium was constructed, the site was believed to have been a cemetery of the Bukidnon Indigenous Peoples. The area was also once inhabited by the Colagnos family, who later relocated to Lukay.

Photograph 2. Clemente Sports Complex

Photo Credits to CPSU Planning Office

Photo Credits to: Mrs. Columba Parcon Segura

Photo by: Mary Grace Noreen P. Leduna

The Homemakers' Home

The Homemakers' Home is located approximately 700 meters northeast of the main gate of Central Philippines State University (CPSU). It is positioned at the left-rear portion of the New Administration Building and to the right of the Procurement Building. The structure, now known as the Scholarship Office, was originally a two-story wooden building designed to accommodate students. Its roof was made of galvanized iron, and the upper floor provided rooms for female students.

According to Mr. Roberto Lescano Segura and Mrs. Columba Parcon Segura, both retired faculty members of the former Negros State College of Agriculture (NSCA) and identified as informants number 3 and 4, the Negros Occidental National Agricultural School (NONAS) was established 19 kilometers from the town center of Kabankalan. Due to its distance from the town proper, the institution provided approximately 30 cottages as free housing facilities for teachers and staff. These cottages were equipped with water and lighting systems. Electricity was sourced from

hydroelectric power, while the water supply came from Banga Creek, which also powered the hydroelectric system.

Male students were allowed to build their own cottages on campus, while female students were given the privilege of staying at the Homemakers' Home, commonly referred to as the Girls' Dormitory. The second floor served as their living quarters. The ground floor housed the school clinic, which was managed at one time by Mr. Añonuevo, the school nurse. Adjacent to the clinic were the Mess Hall and the kitchen, where dormitory occupants could prepare their meals.

Photograph 3. The Homemakers' Home/Girls' Dorm (Now Scholarship Office)

Photo Credits to CPSU Planning Office

Photo Credits to the Historical and Cultural Heritage Center

Photo by: Antonio C. Layumas III

The Ruin of NONAS

The Ruin of NONAS is located approximately 900 meters northeast of the main gate of Central Philippines State University (CPSU). It stands to the right of the Vo-Ag Building and is the remnant of what was once known as the Academic Building,

constructed in 1950. This one-storey structure originally housed six rooms: two (2) classrooms, two (2) rooms for Guidance and Counseling, one (1) office for the Head of the Academic Department, and the Principal's Office. At one point, the department was led by Mrs. Margarita J. Patnubay.

The building was accessed by a five-step staircase facing west, with a clear view of the flagpole and a paved pathway extending in both directions. The roof was made of galvanized iron. The classrooms were regularly used for teaching core subjects such as General Science, Biology, English, and Mathematics.

Photograph 4. Ruins of NONAS (Academic Building)

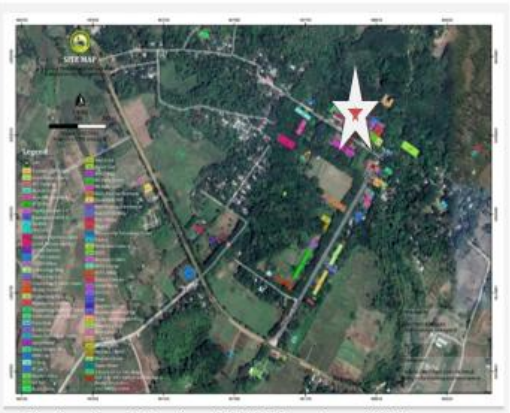

Photo Credits to CPSU Planning Office

Photo by:Denver Q. Jaranilla

According to Mr. Joanary Parcon and Mrs. Susan Parcon, both alumni of the Negros Occidental National Agricultural School (NONAS) and graduates of the Bachelor of Science in Agriculture, the building was known not only for its academic function but also for the discipline and structure it instilled in students. They recalled how the head of the department was known for punctuality, ringing the school bell promptly at 6:00 a.m., followed by a second call at 6:30 a.m. for the flag ceremony held in front of the building near the flagpole.

Tragically, the Academic Building was destroyed by fire in 1986 and has since been left abandoned. Despite its physical decline, the ruins remain a meaningful relic, visited by alumni, students, and even couples, who return to reflect on the rich history and memories associated with the site.

The Lagoon

The lagoon is located approximately 900 meters northeast of the main gate of Central Philippines State University (CPSU). It is situated on the right side of the Vo-Ag Building. The lagoon is a small, shallow body of water surrounded by a variety of trees, creating a serene and shaded natural environment. Locally, the place is

considered enchanted or "riit", as it is believed to be inhabited by unseen or supernatural beings—adding to its mystique and cultural significance within the campus.

The lagoon was once part of the Biological Garden, where both medicinal and ornamental plants were cultivated around its perimeter. The area served as a space for ecological study and a peaceful retreat within the campus grounds.

According to Mr. Eliseo A. Jaravelo and Mr. Jacobo M. Vingno, both retired faculty members of the Negros Occidental National Agricultural School (NONAS) and identified as informants number 8 and 9, the initial clearing and development of the lagoon area was spearheaded by Mr. Claro Abay, then Principal of NONAS, in collaboration with his students. This initiative was later supported and furthered by Mr. Felizardo Alonzagay Sr., who was serving as the institution's Administrative Officer at the time.

Photograph 5. Lagoon

Photo Credits to CPSU Planning Office

Photo by: Forestry 2

The Twin Cave

The Twin Cave is located approximately 1.5 kilometers northeast of the main gate of Central Philippines State University (CPSU) and lies within the perimeter of the university grounds. As its name suggests, the cave features two vertical openings, which give it the distinct designation "Twin Cave." Each opening is approximately 70 meters deep, and the cave is known to dry out during the dry season. The cave is naturally inhabited by colonies of bats, adding to its secluded and eerie atmosphere.

According to Mr. Eliseo A. Jaravelo, a retired faculty member of the former Negros Occidental National Agricultural School (NONAS) and identified as informant number 8, the Twin Cave was traditionally used by locals as a disposal site for dead animals, particularly carabaos, due to its great depth—eliminating the need for burial.

Water from higher terrain drains into the cave during the rainy season, contributing to its dynamic and potentially dangerous internal structure.

Over the years, the Twin Cave has piqued the curiosity of both locals and outsiders. Mr. Jaravelo recounted an instance where foreign explorers camped at the site for nearly two weeks to conduct an excavation. Despite their efforts, they could not determine the full depth or nature of the cave's passageways, and they left without releasing any official findings. Local beliefs suggest that the cave's subterranean channels may extend as far as the Ilog River.

Because of its depth, instability, and lack of a confirmed base, the Twin Cave is regarded as one of the most dangerous caves in Southern Negros. No known individual has reached its deepest point. Only a single foreigner, long ago, attempted a full descent but was unsuccessful in reaching the cave's bottom.

Photograph 6. The Twin Cave

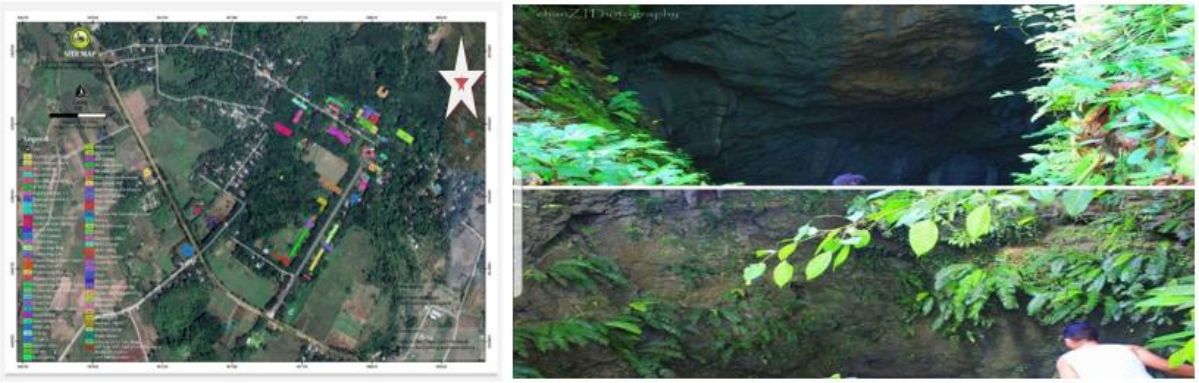

Photo Credits to CPSU Planning Office Photo by: ChanZIphotography

The Vocational Agriculture (Vo-Ag) Building

The Vocational Agriculture (Vo-Ag) Building is located approximately 900 meters northeast of the main gate of Central Philippines State University (CPSU). Positioned at the rear portion of the College of Teacher Education Building, the Vo-Ag Building originally comprised eight (8) classrooms, primarily used for agriculture-related instruction. In addition to classroom functions, the building also supported the operations of the school nursery, notably the BCCO (Barangay Community Cooperative Organization). Adjacent to the Vo-Ag was the former university library.

According to Mr. Julio A. Palomar Jr., former Vice President of NSCA; Mrs. Heidi A. Palomar, retired Assistant Professor of NSCA; and Mr. Eliseo Jaravelo, retired faculty member of NONAS, identified as informants numbers 6, 7, and 8, respectively, the two front rooms of the Vo-Ag Building were initially used as the old library, as

well as science and physics classrooms. Other sections of the building were designated for agriculture classes.

One particular room also became the practice area of the "D'Clippers Original," a local karate club in which Mr. Jaravelo himself was an active member.

Local lore holds that the area is "riit", a term used to describe enchanted or sacred places, owing to its proximity to the lagoon, which is believed to be the dwelling place of unseen spirits or supernatural beings. This belief adds a cultural and mystical dimension to the Vo-Ag Building's historical significance on campus.

Photograph 7. The Vocational Agriculture (Vo-Ag) Building

Photo Credits to CPSU Planning Office

Photo by: Antonio C. Layumas III

The Home Economics Building (Now Mount Ballo Hall)

The Home Economics Building, now known as Mount Ballo Hall, is located approximately 500 meters northeast of the main gate of Central Philippines State University (CPSU). It stands on the right side of Abada Avenue and was originally constructed to support the Homemaking curriculum for female students.

The building comprised three specialized rooms: the Food Laboratory, the Clothing Room, and the Handicraft Room. It also featured two guest rooms intended for the accommodation of visitors to the former Negros Occidental National Agricultural School (NONAS). In addition to the main structure, annex rooms were later added to serve as extended lodging facilities for guests staying overnight or for extended periods, as no other presentable accommodations were available on campus at that time.

According to Dr. Fernando D. Abello, retired CPSU Vice President for Academic Affairs, and Mr. Jacobo M. Vingno, retired faculty member of NONAS, identified as informants numbers 2 and 9, the building also served as temporary housing for new school heads who were appointed as resident administrators of the

institution, in alignment with the "home" function implied in the building's original name.

The building was primarily used to train students in Food and Technology subjects, offering hands-on learning opportunities that complemented the academic curriculum. The building underwent renovation in recent years and was renamed Mount Ballo Hall.

When casually asked about the change in name, the current school head explained that the new name draws inspiration from Sitio Ballo, located in the upper part of Barangay Tagukon. This area encompasses the highest mountain within the land reservation of Central Philippines State University, hence the symbolic renaming of the structure to Mount Ballo Hall, representing both elevation and transformation.

Photograph 8. Home Economics Building (now Mount Ballo Hall)

Photo Credits to CPSU Planning Office

Photo by: Mary Grace Noreen P. Leduna

The Kiosk

The kiosk is located approximately 600 meters northeast of the main gate of Central Philippines State University (CPSU). It stands about 20 meters behind the New Administration Building and serves as a peaceful and scenic landmark where students and visitors can relax and socialize.

The original design of the kiosk has been preserved over the years, with only minor modifications. The primary update involved replacing the flooring and stairs with cement to improve durability, while the overall structure and aesthetic have remained the same.

According to Mr. Jacobo M. Vingno, retired faculty member and informant number 9, the kiosk was built by pioneering students at the Negros Occidental National Agricultural School (NONAS) as a class donation from Batch 1960–1961. The names of the students who contributed to this legacy are inscribed at the base of the structure, commemorating their contribution to the institution's heritage.

The road leading from the main gate to the kiosk remains the same path that once guided students and faculty to the core of the former NONAS campus. The area was designed to serve as a Rotonda, a central junction from which most of the school's original buildings, located uphill from the kiosk, were accessible.

Photograph 9. Kiosk

Photo Credits to CPSU Planning Office

Photo by: Mary Grace Noreen P. Leduna

Abada Avenue

Abada Avenue stretches approximately 600 meters from the main gate to the New Administration Building of Central Philippines State University (CPSU). It serves as the main thoroughfare within the university and is a two-way road with a center island dividing the lanes. This road is functional and historically significant, as it was once the heart of residential life for the university's teaching and administrative staff.

Lining both sides of Abada Avenue were 10 wooden cottages constructed for teachers and employees. These cottages featured galvanized iron roofing and were part of a larger housing network: 15 more cottages were located along Mahogany Avenue and Mango Avenue, while the remaining three cottages stood along Calle Utod. Notably, six cottages faced the plaza, and another 6 faced the Academic Building. The area also included the residence of the Superintendent, positioned within the same vicinity.

According to Dr. Fernando D. Abello, retired CPSU Vice President for Academic Affairs, and Mrs. Milagros Calalas, retired CPSU faculty member, identified as informant numbers 2 and 10, Abada Avenue was once surrounded by the residences of the institution's staff and faculty, making it a central part of campus life.

The avenue was named in honor of Senator Esteban Abada, a distinguished legislator of the Republic of the Philippines and a native of Kabankalan City, Negros Occidental. His name remains etched in the university's landscape as a tribute to his contributions and roots in the local community.

Photograph 10. Abada Avenue

Photo Credits to CPSU Planning Office

Photo by: Jahnell Dechavez Jareño

The Banana, Coffee, and Cacao Orchard (BCCO)

The Banana, Coffee, and Cacao Orchard (BCCO) is located approximately 1 kilometer northeast of the main gate of Central Philippines State University (CPSU). It is situated at the rear of the Vo-Ag Building, serving as a vital extension of the university's agricultural education program.

The original structure of the BCCO featured a galvanized iron roof and cemented flooring, and it functioned as a primary venue for agricultural classes and hands-on training. Over time, the building was renovated, and the new structure was rebuilt using hardwood, enhancing its durability while preserving its educational purpose.

According to Mr. Julio A. Palomar Jr., former Vice President of Negros State College of Agriculture (NSCA), and Mrs. Heidi A. Palomar, retired Assistant Professor of NSCA, identified as informant numbers 6 and 7, the BCCO was established through the initiative of Mr. Claro Abay, a vocational agriculture teacher. He and his students worked collectively to develop and maintain the orchard.

The informants emphasized that beyond the physical development of the orchard, the agricultural knowledge imparted to students, particularly in plant propagation, seed selection, and orchard management, was of lasting value. The BCCO remains a symbol of applied learning, student involvement, and the practical roots of agricultural education at CPSU.

Photograph 11. Banana, Coffee and Cacao Orchard (BCCO)

Photo Credits to CPSU Planning Office

Photo by:Denver Q. Jaranilla

The Old Farm Shop

The Old Farm Shop is located approximately 1 kilometer east of the main gate of Central Philippines State University (CPSU), situated in Purok CPSU II. The structure was built primarily of wood, with a galvanized iron roof, and served as a vital facility for the university's vocational and agricultural operations.

The building housed the office of the shop teacher, while the remaining area was used to store and operate machinery, such as planers and saws. This setup allowed students to engage in practical training involving carpentry, woodwork, and mechanical skills.

Photograph 12. Old Farm Shop

Photo Credits to CPSU Planning Office

Photo by: Mary Grace Noreen P. Leduna

According to Mr. Julio A. Palomar Jr., former Vice President of Negros State College of Agriculture (NSCA), and Mrs. Heidi A. Palomar, retired Assistant Professor of NSCA, both identified as informant numbers 6 and 7, the Farm Machinery Building, located in the same vicinity, was used to store tractors, school service vehicles, and various farm implements.

The school also operated a sawmill, enabling the production of lumber used in constructing cottages, campus buildings, the gymnasium, and even classroom furniture such as chairs. In addition to serving as a workshop, the Old Farm Shop was also used as a classroom, providing students with hands-on experience in agricultural mechanics and technical skills essential for rural development.

The Head of the Carabao Seal (NOAC Seal)

The Head of the Carabao Seal is located approximately 20 meters from the main gate of Central Philippines State University, directly across the national highway. This structure serves as a significant landmark of the university, bearing the name Negros Occidental National Agricultural School (NONAS), which was founded in 1947. Made of concrete cement, the seal stands at 15 feet in height and is encircled by a decorative design of 24 corn kernels.

Photograph 13. Head of the Carabao Seal

Photo Credits to CPSU Planning Office

Photo by: Mary Grace Noreen P. Leduna

According to Dr. Marcelino A. Dechavez, Vocational Schools Superintendent II and the first President of the Negros State College of Agriculture (NSCA), the Head of the Carabao Seal, also known as the NOAC Seal or "ulo karbaw", was originally designed by Engr. Ernesto Abanilla, a Physics teacher at NOAC. The 24 corn kernels surrounding the seal represent the love for farming, which was regarded as the primary virtue instilled in NOAC students. Furthermore, each kernel symbolizes one of the 24 core values upheld by the institution: commitment, courage, decency, faith, flexibility, generosity, hard labor, honesty, humility, industry, ingenuity, integrity, intelligence, leadership, loyalty, patience, perseverance, punctuality, resilience, respect, responsibility, service, teamwork, and thriftiness.

In its earlier form, the seal was surrounded by smaller pillars connected to the central "ulo karbaw" pillar by large iron chains. Over time, however, students would

often sit and rock on the chains, causing the smaller pillars to weaken and eventually collapse. Despite these changes, the Head of the Carabao Seal continues to stand as a lasting emblem of CPSU's agricultural heritage and the values that shaped its foundation.

Horseshoe Park

The Horseshoe Park is located approximately 1 kilometer north of the main gate of Central Philippines State University (CPSU). It is situated on the left side of Cottage No. 28, now the residence of Dr. Fernando D. Abello, the university's Vice President for Academic Affairs, and just below the CPSU Roman Catholic Chapel. The park is found along the road leading to Green Hills.

As its name suggests, the Horseshoe Park is horseshoe-shaped, with a water fountain positioned at its center. The park is surrounded by trees and lush mowed grass, offering a cool and refreshing atmosphere. It lies along a two-way road commonly used by pedestrians and vehicles alike. From 1959 to 1960, the park was beautifully landscaped with Bermuda grass, and adorned with orange, pink, and white Lirio flowers, which bloomed from April to May. Surrounding the area were bougainvillea plants, further enhancing its vibrant appearance.

Photograph 14. Horseshoe Park

Photo Credits to CPSU Planning Office

Photo by: Grace Noreen P. Leduna

According to Mr. Roberto Lescano Segura and Mrs. Columba Parcon Segura, both retired faculty members of NSCA, and Mrs. Susan Parcon, an alumna of NONAS, marked as informant numbers 3, 4, and 5, the Horseshoe Park holds a special place in the hearts of many. It was a favored spot for students, friends, and young lovers, who gathered there to relax and enjoy each other's company. They described the park as a place that exudes a sudden burst of energy, where the trees seem to embrace each

person, making conversations and story-sharing even more meaningful. For many, the park is a symbol of treasured moments and remains a cherished space for rekindling memories from the past.

Extent of the Characteristics of the Sites of Central Philippines State University

The succeeding presentation reflects the extent of the characteristics of the sites of Central Philippines State University in terms of uniqueness and appeal, educational/economic/historical/cultural value, accessibility, availability of basic utilities, and availability of onsite facilities.

Uniqueness and Appeal

Table 1 revealed that as to uniqueness and appeal, Abada Avenue having a mean of 4.92, standard deviation of 0.12 with interpretation of very evident, ranked 1; Twin Cave having a mean of 4.75, standard deviation of 0.00 with interpretation of very evident, ranked 2; Lagoon having a mean of 4.25, standard deviation of 0.00 with interpretation of very evident, ranked 3; Ruin of NONAS, Vo-Ag, BCCO, Old Farm Shop, and Horseshoe having a mean of 4.00, standard deviation of 0.00 with interpretation of quite evident, ranked 6; Kiosk and Head of the Carabao Seal having a mean of 3.75, standard deviation of 0.00 with interpretation of quite evident, ranked 9.5; Clemente Sports Complex having a mean of 3.44, standard deviation of 0.34 with interpretation of quite evident; ranked 11; Mount Ballo Hall having a mean of 3.25, standard deviation of 0.00 with interpretation of fairly evident, ranked 12; Old Administration Building having a mean of 2.90, standard deviation of 0.13 with interpretation of fairly evident, ranked 13; and Women's Dormitory having a mean of 2.50, standard deviation of 0.00 with interpretation of slightly evident.

Table 1. Extent of the Characteristics of the Historical Sites of Central Philippines State University as to Uniqueness and Appeal

Uniqueness and Appeal	Mean	Standard Deviation	Interpretation
Old Administration Building (Old Library)	2.90	0.13	Fairly Evident
Clemente Sports Complex	3.44	0.34	Quite Evident
Women's Dormitory (Scholarhip Office)	2.50	0.00	Slightly Evident
Ruin of NONAS	4.00	0.00	Quite Evident
Lagoon	4.25	0.00	Very Evident
Twin Cave	4.75	0.00	Very Evident
Vo-Ag	4.00	0.00	Quite Evident
Mount Ballo Hall	3.25	0.00	Fairly Evident
Kiosk	3.75	0.00	Quite Evident
Abada Avenue	4.92	0.12	Very Evident
BCCO	4.00	0.00	Quite Evident

Old Farm House	4.00	0.00	Quite Evident
Head of the Carabao Seal	3.75	0.00	Quite Evident
Horseshoe Park	4.00	0.00	Quite Evident

Educational/Economic/Historical/Cultural Values

Table 2 revealed that as to educational/economic/historical/cultural value, Twin Cave and Head of the Carabao Seal having a mean of 4.75, standard deviation of 0.00 with interpretation of very evident, ranked 1.5; BCCO and Old Farm Shop having a mean of 4.50, standard deviation of 0.00 with interpretation of very evident, ranked 3.5; Vo-Ag and Abada Avenue having a mean of 4.25, standard deviation of 0.00 with interpretation of very evident, ranked 5.5; Clemente Sports Complex having a mean of 3.85, standard deviation of 0.13 with interpretation of quite evident, ranked 7; Ruin of NONAS, Lagoon, and Mount Ballo Hall having a mean of 3.75, standard deviation of 0.00 with interpretation of quite evident, ranked 9; Kiosk and Horseshoe having a mean of 3.25, standard deviation of 0.00 with interpretation of fairly evident, ranked 11.5; Old Administration Building having a mean of 3.04, standard deviation of 0.26 with interpretation of fairly evident, ranked 13; and Women's Dormitory having a mean of 2.25, standard deviation of 0.00 with interpretation of slightly evident, ranked 14.

Table 2. Extent of the Characteristics of the Historical Sites of Central Philippines State University as to Educational/Economic/Historical/Cultural Value

Educational/Economic/ Historical/Cultural Value	Mean	Standard Deviation	Interpretation
Old Administration Building (Old Library)	3.04	0.26	Fairly Evident
Clemente Sports Complex	3.85	0.13	Quite Evident
Women's Dormitory (Scholarship Office)	2.25	0.00	Slightly Evident
Ruin of NONAS	3.75	0.00	Quite Evident
Lagoon	3.75	0.00	Quite Evident
Twin Cave	4.75	0.00	Very Evident
Vo-Ag	4.25	0.00	Very Evident
Mount Ballo Hall	3.75	0.00	Quite Evident
Kiosk	3.25	0.00	Fairly Evident
Abada Avenue	4.25	0.00	Very Evident
BCCO	4.50	0.00	Very Evident
Old Farm Shop	4.50	0.00	Very Evident
Head of the Carabao Seal	4.75	0.00	Very Evident
Horseshoe Park	3.25	0.00	Fairly Evident

Accessibility

Table 3 revealed that as to accessibility, Head of the Carabao Seal having a mean of 4.75, standard deviation of 0.00 with interpretation of very evident, ranked 1; Abada Avenue having a mean of 4.08, standard deviation of 0.12 with interpretation of quite evident, ranked 2; Clemente Sports Complex, Mount Ballo Hall, and Horseshoe

having a mean of 3.75, standard deviation of 0.00 with interpretation of quite evident, ranked 4; BCCO having a mean of 3.50, standard deviation of 0.00 with interpretation of quite evident, ranked 6; Old Farm Shop having a mean of 3.25, standard deviation of 0.00 with interpretation of fairly evident, ranked 7; Kiosk having a mean of 3.00, standard deviation of 0.00 with interpretation of fairly evident; ranked 8; Women's Dormitory, Twin Cave and Vo-Ag having a mean of 2.75, standard deviation of 0.00 with interpretation of fairly evident, ranked 10; Old Administration Building having a mean of 2.54, standard deviation of 0.26 with interpretation of slightly evident, ranked 12; Ruin of NONAS having a mean of 2.50, standard deviation of 0.00 with interpretation of slightly evident, ranked 13; and lagoon having a mean of 2.25, standard deviation of 0.00 with interpretation of slightly evident.

Table 3. Extent of the Characteristics of the Historical Sites of Central Philippines State University as to Accessibility

Accessibility	Mean	Standard Deviation	Interpretation
Old Administration Building (Old Library)	2.54	0.26	Slightly Evident
Clemente Sports Complex	3.75	0.00	Quite Evident
Women's Dormitory (Scholarship Office)	2.75	0.00	Fairly Evident
Ruin of NONAS	2.50	0.00	Slightly Evident
Lagoon	2.25	0.00	Slightly Evident
Twin Cave	2.75	0.00	Fairly Evident
Vo-Ag	2.75	0.00	Fairly Evident
Mount Ballo Hall	3.75	0.00	Quite Evident
Kiosk	3.00	0.00	Fairly Evident
Abada Avenue	4.08	0.12	Quite Evident
BCCO	3.50	0.00	Quite Evident
Old Farm Shop	3.25	0.00	Fairly Evident
Head of the Carabao Seal	4.75	0.00	Very Evident
Horseshoe Park	3.75	0.00	Quite Evident

Availability of Basic Utilities

Table 4 revealed that as to availability of basic utilities, Clemente Sports Complex having a mean of 4.20, standard deviation of 0.00 with interpretation of very evident, ranked 1; Mount Ballo Hall having a mean of 4.00, standard deviation of 0.00 with interpretation of quite evident, ranked 2; Head of the Carabao Seal having a mean of 3.75, standard deviation of 0.00 with interpretation of quite evident, ranked 3; Abada Avenue having a mean of 2.87, standard deviation of 0.20 with interpretation of fairly evident, ranked 4; Old Farm Shop having a mean of 2.60, standard deviation of 0.00 with interpretation of fairly evident, ranked 5; Old Administration Building, Women's Dormitory and Horseshoe having a mean of 2.40, standard deviation of 0.00 with interpretation of slightly evident, ranked 7; Ruin of NONAS and Twin Cave having a mean of 1.80, standard deviation of 0.00 with interpretation of slightly evident; ranked 9.5; Kiosk and BCCO having a mean of 1.60, standard deviation of 0.00 with

interpretation of not evident, ranked 11.5; and Lagoon and Vo-Ag having a mean of 1.40, standard deviation of 0.00 with interpretation of not evident.

Table 4. Extent of the Characteristics of the Historical Sites of Central Philippines State University as to Availability of Basic Utilities

Basic Utilities	Mean	Standard Deviation	Interpretation
Old Administration Building (Old Library)	2.40	0.00	Slightly Evident
Clemente Sports Complex	4.20	0.00	Very Evident
Women's Dormitory (Scholarship Office)	2.40	0.00	Slightly Evident
Ruin of NONAS	1.80	0.00	Slightly Evident
Lagoon	1.40	0.00	Not Evident
Twin Cave	1.80	0.00	Slightly Evident
Vo-Ag	1.40	0.00	Not Evident
Mount Ballo Hall	4.00	0.00	Quite Evident
Kiosk	1.60	0.00	Not Evident
Abada Avenue	2.87	0.20	Fairly Evident
BCCO	1.60	0.00	Not Evident
Old Farm Shop	2.60	0.00	Fairly Evident
Head of the Carabao Seal	3.75	0.00	Quite Evident
Horseshoe Park	2.40	0.00	Slightly Evident

Availability of Onsite Facilities

Table 5 revealed that as to availability of onsite facilities, Mount Ballo Hall, having a mean of 3.80, standard deviation of 0.00 with an interpretation of quite evident, ranked 1; Clemente Sports Complex having a mean of 3.67, standard deviation of 0.10 with interpretation of quite evident, ranked 2; Old Farm Shop and Head of the Carabao Seal having a mean of 2.40, standard deviation of 0.00 with interpretation of slightly evident, ranked 3.5; Old Administration Building, Women's Dormitory and Horseshoe having a mean of 1.60, standard deviation of 0.00 with interpretation of not evident, ranked 6; Vo-Ag having a mean of 1.40, standard deviation of 0.00 with interpretation of not evident, ranked 8; Ruin of NONAS, Abada Avenue and BCCO having a mean of 1.20, standard deviation of 0.00 with interpretation of not evident, ranked 10; Lagoon, Twin Cave and Kiosk having a mean of 1.00, standard deviation of 0.00 with interpretation of not evident, ranked 13.

Table 5. Extent of the Characteristics of the Historical Sites of Central Philippines State University as to Availability of Onsite Facilities

Onsite Facilities	Mean	Standard Deviation	Interpretation
Old Administration Building (Old Library)	1.60	0.00	Not Evident
Clemente Sports Complex	3.67	0.10	Quite Evident
Women's Dormitory (Scholarship Office)	1.60	0.00	Not Evident
Ruin of NONAS	1.20	0.00	Not Evident

Lagoon	1.00	0.00	Not Evident
Twin Cave	1.00	0.00	Not Evident
Vo-Ag	1.40	0.00	Not Evident
Mount Ballo Hall	3.80	0.00	Quite Evident
Kiosk	1.00	0.00	Not Evident
Abada Avenue	1.20	0.00	Not Evident
BCCO	1.20	0.00	Not Evident
Old Farm Shop	2.40	0.00	Slightly Evident
Head of the Carabao Seal	2.40	0.00	Slightly Evident
Horseshoe Park	1.60	0.00	Not Evident

Summary of the Extent of the Characteristics of the Sites of Centra Philippines State University

Table 6 revealed that educational, economic, historical and cultural views got a mean of 3.82 with standard deviation of 0.69 and marked as quite evident, ranked 1; uniqueness and appeal got a mean of 3.81 with standard deviation of 0.69 and marked as quite evident, ranked 2; accessibility got a mean of 3.07 with standard deviation of 3.07 and marked as fairly evident, ranked 3; availability of basic facilities got a mean of 2.34 with standard deviation of 0.92 and marked as slightly evident, ranked 4; and availability of onsite facilities got a mean of 1.75 with standard deviation of 0.97 and marked as not evident, ranked 5.

Table 6. Summary of the Extent of the Characteristics of the Historical Sites of Central Philippines State University as to Availability of Onsite Facilities

Areas	Mean	Standard Deviation	Interpretation
Uniqueness and Appeal	3.81	0.69	Quite Evident
Educational/Economic/Historical /Cultural Value	3.82	0.69	Quite Evident
Accessibility	3.07	0.57	Fairly Evident
Availability of Basic Utilities	2.34	0.92	Slightly Evident
Availability of Onsite Facilities	1.75	0.97	Not Evident

Discussions

The result revealed that there were 14 identified sites inside the perimeter area of Central Philippines State University-Main Campus. The sites were described according to their distance from their point of reference, the main gate of Central Philippines State University-Main Campus, by air distance and its physical appearance. People have stories to tell about the sites, what it is, and how they became through the narratives of the key informants. The sites to stroll through the history of Central Philippines State University, namely the Old Administration Building (now Historical and Cultural Heritage Center), Gymnasium (now Clemente Sports Complex), Women's Dormitory (now Scholarship Office), Ruins of NONAS (Academic Building), Lagoon, Twin Cave, Vo-Ag, Home Economics Building (now

Mount Ballo Hall), Kiosk, Abada Avenue, Banana, Cacao, Coffee Orchard (BCCO), Old Farm House, Head of the Carabao Seal, and Horseshoe Park.

As to the extent of the characteristics of the sites in terms of uniqueness and appeal, Abada Avenue got first in rank, and Women's Dormitory got the last in rank. The Abada Avenue, Twin Cave, and Lagoon signify that these historical sites possess the highest degree of exceptionality, beauty, natural, and recognition. However, the Old Administration Building (Old Library), Clemente Sports Complex, Women's Dormitory (Scholarship Office), Ruin of NONAS, Vo-Ag, Mount Ballo Hall, Kiosk, Old Farm Shop, Head of the Carabao Seal, and Horseshoe Park were only somewhat apparent. The result is somewhat related to the study of Mindanao et al. (2020), which mentioned that tourists consider the surroundings and the environment of the historical attraction. They are looking for a place that is connected to their expectations. Factors contributing to form-place attachment can be both people and places.

In regard to the extent of the characteristics of the sites in terms of educational/economic/historical/cultural value, Twin Cave and Head of the Carabao Seal got first in rank, and Women's Dormitory got last in rank. The Twin Cave, Vo-Ag, Abada Avenue, BCCO, Old Farm Shop, and Head of the Carabao Seal signify that these historical sites possess the value of the highest degree of length of service, cultural, educational or economic significance, relevance to agriculture and ecology, and relevance to program offering. However, the Old Administration Building (Old Library), Clemente Sports Complex, Women's Dormitory (Scholarship Office), Ruin of NONAS, Lagoon, Mount Ballo Hall, Kiosk, and Horseshoe Park have limited possessions. The result supports Alexandrakis, et al. (2018), who found out that demand for a new concept of heritage, in which monuments and landscapes are considered active factors in creating a sense of history, is esteemed not only from a scientific and academic perspective, but also as part of a more sensitive and efficient strategy to link cultural heritage and tourism, by bringing an integrative perspective to the forefront. Implementing such strategies is strictly correlated with supporting decision-makers and increasing people's awareness towards a more comprehensive approach to heritage preservation. A robust socio-economic impact model should be presented.

On the extent of the characteristics of the sites in terms of accessibility, the Head of the Carabao Seal got first in rank, and the lagoon got last in rank. The Head of the Carabao Seal signifies that this historical site possesses the highest degree of accessibility all year, with regular transport service vehicles near the service center and from the town center. However, Old Administration Building (Old Library), Clemente Sports Complex, Women's Dormitory (Scholarship Office), Ruin of NONAS, Lagoon, Twin Cave, Vo-Ag, Mount Ballo Hall, Kiosk, Abada Avenue, BCCO, Old Farm Shop, and Horseshoe Park have limited accessibility. The result coincides with the European Network for Accessible Tourism (2012), which mentioned that in making the building heritage more accessible, it is essential to be aware of people's different needs and how these needs can be met in a variety of ways. It is important to remember that often, the

best and most appropriate way to make historic places more accessible is through management solutions, which may sometimes require little physical intervention or alteration of historic fabric. It is important to recognize that successfully improving access to historic buildings and sites requires an integrated and balanced approach that considers both conservation and accessibility needs.

On the extent of the sites' characteristics in terms of basic utilities' availability, Clemente Sports Complex came first in rank, and Lagoon and Vo-Ag came last in rank. The Clemente Sports Complex signifies that this historical site possesses the highest degree of clean water supply, sufficient power supply, communication availability, drainage system, and solid waste management system. However, the Old Administration Building (Old Library), Women's Dormitory (Scholarship Office), Ruin of NONAS, Twin Cave, Mount Ballo Hall, Abada Avenue, Old Farm Shop, Head of the Carabao Seal, and Horseshoe Park have limited basic services. Meanwhile, Lagoon, Vo-Ag, Kiosk, and BCCO have no showing of their available basic utilities. The result bears in part with those of Designing Buildings (2021), which explained that Utilities are infrastructure services provided to consumers that are sometimes considered to be 'public' services; that is, they are supplied to the public and are important for the normal functioning of society. As a result, they normally come under some form of public control. Utilities are generally considered to include electricity, gas, water sewage, and communications services. Ensuring that utilities are supplied to developments is vitally important, especially in the historical sites.

In the analysis of the extent of the characteristics of the sites in terms of availability of onsite facilities, Mount Ballo Hall got first in rank, and Lagoon, Twin Cave, and Kiosk got last in rank. The Mount Ballo Hall signifies that this historical site possesses the value of a high degree of clean and safe restrooms for women and men, good accommodation facilities including parking, clean and quality food service, activity facilities, and directional and information signage. However, Clemente Sports Complex, Old Farm Shop, and Head of the Carabao Seal possess limited available onsite facilities. In contrast, the Women's Dormitory (Scholarship Office), Ruin of NONAS, Lagoon, Twin Cave, Vo-Ag, Kiosk, Abada Avenue, BCCO, and Horseshoe Park do not show onsite facilities. The result is much the same as that of Hou et al. (2020), who found out the role of facilities in coordinating the management process for the benefit of stakeholders and the general community. Facilities Management allows a balanced approach to heritage building adaptation, sound user experience, and broader community effects. This enables efficient decision-making, creative facilities design, and effective public engagement. Facilities' management's strength in fitting into the urban renewal context illustrates its comparative advantage for heritage conservation and revitalization management.

The overall result implies that the uniqueness and appeal, as well as the educational/economic/historical/cultural value characteristics of Central Philippines State University sites, are somewhat obvious. The accessibility and availability of basic services are limited. While onsite facilities are unavailable, the result coincides with

Alexandrakis et al. (2019), who discussed that cultural heritage assets should be preserved because they play an important role in economic development. It develops a variety of goods and services. It promotes quality and changes in the different sectors. It boosts employment for people. The value of cultural heritage sites provides a range of benefits to society, mostly related to values. The cultural heritage sites directly improve socio-economic value as they increase tourism arrivals. Historical sites also provide opportunities for policy interventions for their conservation. Hence, protection measures must be ensured for the integrity of cultural heritage.

Conclusion

Central Philippines State University is found as the cradle of old structures. Visible from the area were the fourteen (14) well-known sites that are considered treasures of the university, namely the Old Administration Building (now Historical and Cultural Heritage Center), Gymnasium (now Clemente Sports Complex), Women's Dormitory (now Scholarship Office), Ruins of NONAS (Academic Building), Lagoon, Twin Cave, Vo-Ag, Home Economics Building (now Mount Ballo Hall), Kiosk, Abada Avenue, Banana, Cacao, Coffee Orchard (BCCO), Old Farm House, Head of the Carabao Seal, and Horseshoe Park. The sites are famous landmarks and full of memorable stories that took back the residents and personnel of the school in time.

Concerning the status and extent of the characteristics of the 14 identified sites, the strength of the sites was in the educational, economic, historical, and cultural values. The length of their existence was well known through its structure. It has cultural, educational, and economic significance to the institution. It is relevant to agriculture and ecology, which is the institution's main purpose. It is also relevant to the institution's program offerings. The uniqueness and appeal were quite evident. It is natural. It was recognized and exposed. The accessibility of the sites is slightly evident. There were some historical sites that had regular transportation and some that did not. The distance from the service and town center is quite far. The availability of basic utilities is slightly evident. Sites lack clean water and power supply, slow signal connections, poor drainage and sewerage systems, and weak solid waste management systems. The onsite facilities are not evident. No clean and safe restrooms, accommodation facilities are not visible, clean and quality food service is not available, and the directions and information signage are not clear. The researchers highly recommended that the administration develop and improve the sites to transform them into a new area of tourism demand. The basic and onsite facilities should be ready and made available to the visitors anytime. The administration should employ or organize trained tour guides to roam around site visitors. The administration should develop a website exclusive to the institutions' sites to make it known to other places. Hence, there is a need to create a site development framework for its promotion and development.

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Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

A Culturally Grounded Responses to Crisis: The Blaan Tribe's Experience of COVID-19 in Southern Mindanao

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Abstract

This study explores the multifaceted impacts of the COVID-19 pandemic on the Blaan Indigenous community in Southern Mindanao, Philippines. Employing a purely qualitative design through ethnographic fieldwork, key informant interviews, and document analysis, the study examined the cultural, health, and socio-economic challenges experienced by the community from 2020 to 2024. Thematic analysis revealed five major themes: disrupted cultural practices and rituals, altered health-seeking behaviors, erosion of traditional livelihoods, limited access to public health services, and emerging resilience mechanisms rooted in indigenous knowledge. Participants expressed concerns over the loss of communal traditions, economic marginalization, and the inadequacy of mainstream health interventions in addressing their cultural realities. Findings underscore the urgency for culturally grounded public health strategies, inclusive policy-making, and sustainable livelihood support systems. The study contributes to the growing body of research highlighting the intersectionality of health, culture, and indigenous resilience in times of crisis. It emphasizes the need for participatory and culturally respectful responses that empower indigenous peoples, safeguard their traditions, and strengthen community-based support mechanisms for future emergencies.

Keywords: *Blaan Tribe, COVID-19 Pandemic, Cultural Health Practices, Ethnography, Indigenous Communities, Public Health*

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Introduction

The COVID 19 pandemic, while widely recognized as a health emergency, has generated significant ripple effects across social, economic, and cultural landscapes. Upland indigenous communities, especially, have been markedly impacted yet remain underrepresented in broader narratives. A poignant example is the Blaan people of Southern Mindanao, whose pandemic experiences encompass more than physical health concerns—they highlight the convergence of cultural resilience, systemic neglect, and the insufficiencies of uniform public health approaches.

Indigenous populations frequently face heightened vulnerability during public health crises due to long-standing structural inequities—limited healthcare access, unstable subsistence livelihoods, and exclusion from policymaking (King, Smith, & Gracey, 2009). The COVID 19 outbreak intensified these issues, disrupting physical well-being and undermining traditional economic systems, spiritual practices, and communal cohesion. For the Blaan—whose identity is deeply rooted in agriculture, communal rituals, and indigenous healing traditions—the pandemic's impact has been both pervasive and profound.

This study is built on the premise that indigenous perspectives are essential for developing culturally attuned health responses (Gone, 2013). It employs a relativist perceptual approach, which foregrounds indigenous epistemologies and cultural frameworks to examine how the Blaan have interpreted and responded to pandemic challenges. Unlike conventional epidemiological models, this approach values subjective experience, ancestral knowledge, and localized meaning-making as critical to understanding indigenous resiliency and adaptation in crisis contexts (Kirmayer, 2019).

Despite a growing body of literature on the general impacts of COVID-19, a critical research gap persists in examining its culturally embedded effects on specific indigenous communities in the Philippines. Much of the current data remains generalized, offering little insight into how traditional knowledge, spiritual beliefs and community values influence pandemic resilience and response. Moreover, national public health frameworks often fail to integrate indigenous perspectives, thereby creating policies that are culturally misaligned and practically ineffective for marginalized groups.

This study contributes to the literature in several keyways. First, it documents how an indigenous community—specifically the Blaan—experiences, interprets, and navigates a modern health crisis through traditional and contemporary means. Second, it highlights the compounded impacts of the pandemic on indigenous livelihood systems, which are largely dependent on farming, craftwork, and

communal exchange. Third, it reveals how the suspension of traditional rituals and gatherings, driven by lockdowns and social distancing protocols, threatens cultural continuity, collective identity, and social cohesion.

Finally, by capturing the culturally specific perceptions and coping mechanisms of the Blaan people, this study provides practical insights for public health professionals, educators, and policymakers. These insights can inform the development of responsive, inclusive, and culturally grounded health interventions that honor indigenous identities while addressing urgent pandemic-related needs. In doing so, the research advances a more equitable understanding of resilience, vulnerability, and recovery in the face of global disruptions.

The study intends to offer insightful analysis by using this all-encompassing strategy that can guide efficient, polite, and culturally sensitive solutions to handle the significant influence of the COVID-19 epidemic on indigenous upland communities. This is consistent with the general conversation on the need of cultural awareness in public health and initiatives of community involvement. This research intends to:

1. With an eye toward the Blaan tribe especially, look at how the COVID-19 epidemic affects indigenous populations living in upland regions.
2. Look at how these indigenous people view their health, way of life, and financial effects.
3. Examine how conventional wisdom interacts with contemporary interventions reacting to the epidemic.

Methodology

This study employed a purely qualitative research design grounded in an ethnographic framework to explore the lived experiences and cultural interpretations of the Blaan tribe in Southern Mindanao in response to the COVID-19 pandemic. The primary aim was to understand how indigenous worldviews, traditional knowledge systems, and social structures shaped the community's perception and response to the health crisis.

Data were gathered through three primary qualitative methods: in-depth key informant interviews, participant observation, and document analysis. Triangulation methods were integrated to ensure a rich and multi-perspective understanding of the phenomenon under investigation.

From June to August 2023, the researcher lived within the Blaan communities, engaging in participant observation. This three-month immersion allowed for close interaction with the community's daily routines, rituals, and coping mechanisms, offering firsthand insight into how the pandemic disrupted traditional practices,

livelihoods, and communal activities. Cultural rituals, local health practices, and adaptations to public health measures were observed and documented in detail.

A total of 25 key informants were purposively selected based on their relevance and depth of knowledge regarding the community's cultural, health, and social practices. These informants included tribal leaders, local health workers, traditional healers, government representatives, and ordinary community members. The interviews, conducted in the local dialect with the aid of a cultural translator, when necessary, followed a semi-structured format to allow for both guided questioning and emergent insights. Themes such as traditional healing, pandemic beliefs, changes in communal life, and perceptions of modern healthcare systems were explored.

In addition to fieldwork, 37 textual sources—including local health bulletins, government advisories, and culturally relevant literature—were reviewed to support the contextual understanding of the Blaan community's pandemic experience. These documents spanned from January 2020 to March 2024, providing background and supplementary information on policy impacts and official responses relevant to indigenous peoples.

The study site comprised three upland barangays in Southern Mindanao, home to significant Blaan populations. These locations were selected based on their cultural richness, accessibility, and diversity in socio-economic status. Together, they offered a representative lens through which to understand broader Blaan experiences during the pandemic.

All ethical protocols were strictly observed. Prior to data collection, the researcher obtained formal consent from both the Barangay Local Government Units (BLGUs) and the Blaan Tribal Council. Each participant was informed of the study's objectives and ethical safeguards. Verbal or written consent was secured, and confidentiality was maintained by anonymizing all participant information.

Thematic analysis was used to interpret the qualitative data. Field notes, transcriptions, and document excerpts were coded and categorized to identify recurring patterns, beliefs, and culturally embedded meanings. Through this method, the study captured not only the factual impact of COVID-19 on the Blaan tribe but also the symbolic and experiential dimensions of how the community made sense of the crisis within their cultural framework.

Despite pandemic-related limitations, including restricted access to some remote areas and reliance on verbal histories for pre-pandemic context, this qualitative inquiry offers deep, culturally nuanced insights into the ways indigenous knowledge systems and social structures shaped the Blaan tribe's resilience and adaptation in the face of a global health emergency.

Results and Findings

The Blaan Tribe: Cultural Identity and Historical Struggles

The Blaan tribe, one of the major indigenous groups in Southern Mindanao, Philippines, derives its name from the words bla (opposite) and an (people), signifying "the other people" or "counterpart tribe." Historically, they have settled across areas such as Sultan Kudarat, South Cotabato, Sarangani, and Davao, with ancestral territories primarily located near the foothills of Mt. Matutum. For centuries, the Blaan have lived in harmony with their environment, maintaining sustainable farming systems and preserving forest resources, making them natural stewards of ecological balance.

However, the Blaan's history is marked by displacement and cultural marginalization. Colonial incursions, religious conversions, land encroachment, and militarization have repeatedly forced them from their ancestral lands. According to cultural writer Renato Jong, the Blaan continue to experience pressure from armed groups and state-sanctioned development projects that compromise their land rights and socio-cultural autonomy. These displacements have fragmented their settlements and challenged their traditional governance systems, with their tribal leaders—datu—struggling to maintain authority amidst external pressures.

Culturally, the Blaan are rich in material and intangible heritage. Their subsistence economy revolves around hunting, dry-rice cultivation, root crop farming, and food gathering—livelihoods closely tied to their spiritual relationship with the land. Traditional crafts such as mabal tabih (abaca weaving) and fais (brass and copper works) embody both aesthetic value and cultural identity. These crafts, often adorned with symbolic geometric patterns, express cosmological beliefs and environmental awareness.

The Blaan language belongs to the Bilic linguistic group and is related to Tiruray and T'boli, distinct from languages in Central and Northern Philippines. Oral traditions, including epics like The Great Datu Ulo E'el and Datu Ba Sabung, reflect their mythological and historical consciousness. Leadership remains localized, with community-based datu presiding over various neighborhoods, preserving social coherence through customary laws and oral history.

Yet, despite these cultural riches, the Blaan face increasing pressures to assimilate. Many tribal members have moved toward urban areas or adopted modern lifestyles, often abandoning indigenous languages, rituals, and governance structures. While official statistics on the Blaan population remain sparse, estimates suggest there are over 450,000 members dispersed across South Cotabato, Sarangani, Sultan

Kudarat, and parts of Davao. They are further divided into subgroups like the Tagalagad, Tagcogon, Buluan, and Vilanes, reflecting linguistic and geographic distinctions.

The Blaan tribe, despite centuries of displacement and marginalization, continues to maintain a rich cultural identity rooted in land, tradition, and community life. Participant accounts reveal both resilience and grief over cultural erosion:

> *"Dati po, lahat ng kabataan ay marunong maghabi at manghuli ng hayop. Ngayon, mas gusto nila ang cellphone kaysa sa mabal tabih." (Before, all youth knew how to weave and hunt. Now, they prefer cellphones over weaving.) – Participant 7, Female Elder, 58*
>
> *"Ang aming datu ay parang libro ng kasaysayan. Kapag nawala siya, mawawala rin ang kwento ng aming pinagmulan."(Our datu is like a living history book. If he dies, the story of our origins may disappear too.) – Participant 12, Male Leader, 63*
>
> *"Sa taas ng bundok kami nagtago noong unang lockdown. Takot kami sa sakit, pero mas takot kaming mawalan ng lupa." (We fled to the mountains during the first lockdown. We feared the disease but feared losing our land even more.) – Participant 20, Farmer, 38*

These responses underscore the continuing threats to Blaan identity—from digital assimilation to generational gaps and land insecurity—amplified by the pandemic.

Pandemic Vulnerabilities of Indigenous Communities

Pandemics have historically revealed and deepened the vulnerabilities of indigenous communities. As emphasized by Smith and Sharp (2015) and King et al. (2017), indigenous populations often suffer disproportionate morbidity and mortality due to intersecting factors such as limited healthcare access, poor living conditions, and marginalization from national health systems. These vulnerabilities were starkly evident during COVID-19, where structural inequalities left many indigenous groups without adequate medical services or culturally appropriate information.

Global data reveal a troubling trend: out of 195 countries, only nine documented COVID-19 mortality rates by indigenous identity (UN Permanent Forum on Indigenous Issues, 2021), pointing to a systemic gap in data-driven policy. Moreover, age and comorbidities—though crucial determinants of COVID-19 outcomes—do not fully capture the risks faced by indigenous populations, whose social vulnerabilities amplify exposure and impact.

This study of the Blaan responds to this gap by highlighting not only health outcomes but also the socio-cultural implications of the pandemic. The lack of targeted responses for groups like the Blaan undermines both epidemiological understanding and public health efficacy.

Participants described the pandemic as a time of uncertainty and disconnection from basic services. Their responses reflect systemic neglect and cultural misalignment in health messaging.

> *"Hindi po namin maintindihan ang mga bilin ng gobyerno. Walang nag-translate sa amin. Ang alam lang namin, bawal lumabas." (We didn't understand government instructions. No one translated for us. We only knew we weren't allowed to go outside.) – Participant 5, Community Mother, 29*
>
> *"May mga namatay dito, pero wala pong doktor. Ang hilot lang namin ang tumulong."(People died here, but there were no doctors. Only our traditional healer helped.) – Participant 11, Traditional Healer, 49*
>
> *"Wala kaming koneksyon sa health center. Ang tingin sa amin, parang wala kaming karapatan sa serbisyo." (We had no connection to the health center. It's like we don't deserve basic services.) – Participant 16, Youth Leader, 22*

These reflections highlight both infrastructural gaps and cultural disconnects that rendered the Blaan community invisible in the pandemic response framework.

Cultural Understandings of Health and Illness

Health perceptions among indigenous peoples like the Blaan are deeply rooted in cultural and spiritual frameworks. Unlike biomedical models, indigenous health systems often merge physical, emotional, environmental, and ancestral dimensions. This aligns with Arthur Kleinman's (1980) theory of explanatory models, which underscores that individuals interpret illness through culturally constructed narratives and respond with culturally specific practices.

For the Blaan, disease is not merely a biological dysfunction but a disruption of cosmic balance, often addressed through rituals, herbal medicines, and the guidance of elders or traditional healers. These practices reflect a holistic worldview that contrasts with formal public health approaches. Paul Farmer (2004) builds on this by situating cultural beliefs within broader structures of inequality, describing how structural violence—poverty, displacement, and systemic neglect—shapes indigenous health behaviors and outcomes.

Byron Good (1994) furthers the discourse by emphasizing the importance of understanding patient narratives in their cultural context. For the Blaan, storytelling,

mythology, and communal memory frame not only responses to illness but also resilience in the face of crises. Recognizing these cultural foundations is essential for any meaningful health intervention within the community.

The Blaan's worldview sees health as interconnected with nature, spirits, and communal harmony. COVID-19 was often perceived through a spiritual-cultural lens.

> *"Hindi lang ito sakit. Ito ay galit ng kalikasan sa mga tao na sumisira sa lupa." (This is not just an illness. It is nature's anger at people who destroy the land.) – Participant 3, Spiritual Elder, 65*
>
> *"Nag-alay kami ng ritwal para maprotektahan ang aming pamilya. Mas panatag kami doon kaysa sa gamot na di namin alam." (We performed rituals to protect our family. We felt safer with that than with medicine we don't understand.) – Participant 15, Woman Healer, 41*
>
> *"Ang gamot sa amin ay hindi lang tableta. Kailangan buo—katawan, isipan, at kalikasan." (Medicine to us is not just tablets. It must be holistic—body, mind, and nature.) – Participant 23, Farmer, 33*

These statements affirm that effective health responses in indigenous settings must incorporate cultural beliefs and spiritual practices.

Economic Disruption and Livelihood Loss

The pandemic has compounded long-standing economic vulnerabilities among indigenous groups. For the Blaan, whose livelihoods are intimately tied to land, nature, and traditional crafts, the disruption caused by COVID-19 was not merely financial—it was existential. Coulthard (2014) argues that indigenous economies are not only material systems but also cultural ones, intertwined with identity, knowledge transmission, and community cohesion.

Lockdowns, mobility restrictions, and health risks severely disrupted the Blaan's capacity to engage in swidden agriculture, forest gathering, and artisan trade. Brosius (2010) warns that when traditional livelihoods collapse, so too does the intergenerational transfer of skills and knowledge, threatening the community's social fabric. Furthermore, exclusion from mainstream economic safety nets and limited digital infrastructure marginalized Blaan families from pandemic-era recovery programs.

This economic precarity, in turn, affected food security, access to healthcare, and mental well-being—demonstrating the cascading effect of livelihood loss in indigenous communities.

Lockdowns and restrictions severely disrupted the Blaan's livelihoods, with cascading effects on food security, income, and cultural roles.

> *"Nabubuhay kami sa paghahanap ng ugat, palay, at saging. Pero noong lockdown, hindi kami makapunta sa gubat."(We survive by gathering roots, rice, and bananas. But during the lockdown, we couldn't go to the forest.) – Participant 4, Elder Farmer, 60*
>
> *"Dati po may kita kami sa pamamalengke ng habi. Ngayon, wala nang bumibili kasi sarado ang bayan."(We used to earn from selling woven cloth at the market. Now no one buys it because the town is closed.) – Participant 14, Weaver, 45*
>
> *"Nagkakautang kami para sa bigas. Hindi sapat ang ani, at walang ayuda mula gobyerno."*
>
> *(We're in debt just to buy rice. Our harvest isn't enough, and we received no government aid.) – Participant 19, Family Head, 36*

These accounts confirm the deeply interwoven relationship between land, culture, and economy—and the vulnerability of indigenous subsistence systems during global crises.

Cultural Preservation and the Role of Culturally Responsive Interventions

As external crises threaten indigenous ways of life, the role of culturally sensitive interventions becomes paramount. Scholars such as Smith (2013) and Chandler and Lalonde (1998) argue for health and development strategies that incorporate traditional knowledge systems and empower local decision-making.

In the context of COVID-19, public health campaigns that excluded indigenous languages or ignored traditional healing practices often failed to gain trust. For the Blaan, integrating customary healing, community consultations, and rituals into health interventions not only enhances effectiveness but affirms cultural identity. UN General Assembly (2015) emphasizes that respecting indigenous epistemologies leads to better community engagement and health outcomes. Similarly, Chandler and Lalonde (1998) highlight that when communities have autonomy over their health strategies, outcomes are more sustainable and culturally congruent.

This study affirms that cultural preservation is not merely a matter of heritage, but a strategy of survival. Supporting the Blaan's resilience requires interventions that align with their worldviews, livelihoods, and communal values—not imposed models but co-designed solutions grounded in respect, reciprocity, and relevance.

Participants called for development approaches that respect their knowledge, practices, and autonomy. Many felt that external responses overlooked what they value most.

> *"May sarili kaming paraan ng pag-alaga sa may sakit. Sana kinilala nila iyon, hindi kami hinusgahan." (We have our own way of caring for the sick. I wish they had respected that instead of judging us.) – Participant 2, Tribal Midwife, 54*
>
> *"Ang pinakamagandang tulong ay iyong tanungin muna kami bago gumawa ng programa."*
>
> *(The best help is to ask us first before making a program.) – Participant 10, Youth Organizer, 27*
>
> *"Kung gusto nilang tumulong, dapat kasama kami sa pagpapasya. Hindi pwedeng laging sila lang ang may alam."(If they want to help, we should be involved in decision-making. It shouldn't always be them who know everything.) – Participant 21, Local Datu, 61*

These insights support the call in literature (Smith 2013; Chandler & Lalonde 1998) for co-designed, community-led solutions that embed cultural identity within health and development efforts.

Discussions

This study explored the multidimensional impact of the COVID-19 pandemic on the Blaan indigenous community in Southern Mindanao using a qualitative, culturally responsive approach. Through in-depth interviews, immersion, and document analysis, several key themes emerged: cultural disruption, health perception, economic vulnerability, exclusion from systems, and resilience. These findings underscore the pandemic's role as both a public health crisis and a catalyst for exposing deeper structural inequalities faced by indigenous communities.

Cultural Disruption and Identity Erosion

The COVID-19 pandemic significantly intensified long-standing threats to the cultural integrity of the Blaan people. Health protocols such as lockdowns, curfews, and social distancing directly impeded communal gatherings, intergenerational rituals, and the informal transmission of knowledge—core aspects of indigenous cultural continuity. Skills such as mabal tabih (traditional weaving), hilot (indigenous healing), and udul (oral storytelling) faced a noticeable decline as physical proximity between elders and youth was curtailed. These findings affirm the argument of Smith (2013), who contends that colonial and modern interventions often silence indigenous knowledge systems by disrupting their natural modes of transmission. Similarly, Chandler and Lalonde (1998) argue that cultural continuity—especially in youth engagement with traditional practices—is a critical determinant of indigenous well-

being. Without active preservation efforts embedded in emergency response systems, pandemics can accelerate cultural erosion, leaving communities like the Blaan at greater risk of identity fragmentation and loss of ancestral memory. This underscores the urgency of including cultural safeguarding in long-term resilience frameworks for indigenous communities.

Health Perceptions and Indigenous Worldviews

Health, for the Blaan, is not limited to the absence of disease but is a dynamic balance between physical well-being, spiritual harmony, and environmental alignment. This holistic view aligns with Kleinman's (1980) theory of explanatory models, which proposes that communities interpret illness through culturally defined beliefs and practices. Among the Blaan, COVID-19 was not simply perceived as a virus but also as a spiritual disruption, requiring ritual offerings, plant-based medicine, and ancestral guidance. The reliance on traditional healing was not rooted in ignorance of biomedical science but in a distinct epistemology grounded in generations of lived experience and spiritual understanding. However, the public health response largely failed to acknowledge this worldview. As noted by Kirmayer (2019), indigenous healing systems are often marginalized in favor of universal biomedical models that neglect local narratives. This lack of culturally adapted communication—combined with the absence of translated health advisories—led to misinformation, fear, and reduced compliance with government mandates. The Blaan case reflects the pressing need for health communication strategies that are linguistically and culturally congruent with indigenous populations.

Livelihood Vulnerability and Economic Fragility

The economic consequences of the pandemic were deeply felt among the Blaan, whose subsistence-based livelihoods depend heavily on forest gathering, small-scale farming, and traditional crafts. Travel restrictions and market shutdowns disrupted food supply chains, impeded income-generating activities, and constrained access to essential goods. These disruptions resonate with Brosius (2010), who argues that when indigenous livelihoods are interrupted, cultural practices and ecological relationships also suffer. For the Blaan, livelihoods are not merely economic; they are cultural acts that reinforce identity, transmit knowledge, and maintain social order. Buncag (2022) further explains that indigenous economies are tied to collective stewardship and community reciprocity, not individual profit. When income from weaving or farming disappears, so too does the structure of communal roles, ritual responsibilities, and the transmission of ecological knowledge. Compounding the problem was the

community's limited access to government relief programs. Their invisibility in census-based aid distribution reflected a broader structural neglect, echoing the findings of Anderson et al. (2016) who emphasize that indigenous communities are often excluded from mainstream recovery efforts due to lack of data disaggregation and culturally blind policymaking.

Exclusion from Governance and Public Health Planning

The Blaan community reported minimal involvement in pandemic-related decision-making processes. Tribal leaders were rarely consulted, and health responses were designed without consideration of indigenous realities. This disconnect aligns with observations by the United Nations Permanent Forum on Indigenous Issues (2021), which highlights that in most global contexts, indigenous peoples were not meaningfully included in COVID-19 governance. In the Blaan case, this exclusion fostered mistrust, with some participants expressing skepticism toward government interventions that neither acknowledged traditional leadership nor addressed cultural priorities. The top-down nature of public health policies resulted in confusion and rejection, particularly when programs conflicted with traditional practices. Moreover, the absence of ethnicity-specific health and economic data prevented targeted support, reinforcing historical patterns of marginalization. As Bonoan et al. (2021) point out, meaningful inclusion of indigenous perspectives in governance structures is not just a matter of equity, it is essential for the efficacy and relevance of public health interventions.

Cultural Resilience and Adaptive Strategies

Despite these challenges, the Blaan community displayed remarkable resilience, rooted in cultural identity, spiritual practice, and social cohesion. Elders adapted rituals to smaller group settings, herbal knowledge was revitalized, and informal education continued within household units. These adaptive practices mirror what Chandler and Lalonde (1998) call "cultural continuity" as a buffer against external disruption. Rather than abandoning tradition, the Blaan innovated within its framework, integrating safety measures into their healing and communal activities. This resilience is often overlooked in formal disaster planning, yet it offers valuable lessons. As emphasized by Gone (2013), indigenous responses to crisis are most effective when grounded in cultural logic and self-determination. In the face of structural exclusion and economic adversity, the Blaan turned to community-centered strategies that reaffirmed their identity and ensured cultural survival. Their experience

demonstrates that culturally grounded responses are not only more sustainable but also more effective in promoting collective well-being during emergencies.

Synthesis and Broader Implications

The findings of this study highlight the intersectional nature of vulnerability in indigenous communities during health crises. For the Blaan, the COVID-19 pandemic exposed not only health-related risks, but also deep-seated issues related to cultural preservation, economic marginalization, and political exclusion. The experience of the Blaan tribe reveals that public health and development interventions must be inclusive of indigenous voices, respectful of traditional knowledge, and aligned with local realities.

Importantly, the study fills a gap in national and regional literature on how pandemics affect specific indigenous groups in the Philippines. It reinforces the need for culturally competent health systems and community-driven approaches to policymaking. Sustainable solutions must be grounded not just in modern science but also in cultural understanding, partnership, and mutual respect.

Conclusion

This study explored the lived experiences of the Blaan indigenous community in Southern Mindanao during the COVID-19 pandemic through a culturally grounded, qualitative lens. The findings reveal that the pandemic not only posed a public health threat but also exacerbated long-standing structural inequalities, disrupted traditional livelihoods, and challenged the cultural integrity of the Blaan people.

Culturally, the Blaan maintained a holistic understanding of health—one deeply rooted in nature, spirituality, and community. The onset of COVID-19 was interpreted not only as a biomedical event but also as a spiritual imbalance, prompting the use of traditional healing rituals alongside selective engagement with modern medicine. However, the lack of culturally appropriate health communication and the absence of indigenous language support alienated many community members from accessing critical services. This reinforces the need for localized and culturally responsive public health frameworks in indigenous contexts.

Economically, the pandemic disrupted the Blaan's subsistence-based livelihoods—particularly farming, gathering, and weaving—exposing the fragility of traditional economies when external crises limit mobility and market access. The lack of direct government support, compounded by exclusion from mainstream relief systems, forced many households into deeper poverty and indebtedness. These effects were not only financial but also cultural, as the interruption of traditional economic roles weakened intergenerational knowledge transfer and community cohesion.

Socially, the prohibition of gatherings and rituals significantly affected the transmission of oral traditions, the authority of tribal leaders, and the community's spiritual practices. The findings affirm that cultural preservation and health resilience are interdependent in indigenous settings. The cultural narratives, leadership structures, and spiritual beliefs of the Blaan must be acknowledged not as obstacles to modern health interventions but as foundational to their identity and coping mechanisms.

Ultimately, this study affirms that the impact of the pandemic on the Blaan tribe cannot be fully understood without accounting for the complex interplay of culture, identity, and marginalization. The absence of culturally inclusive data and policy responses has only deepened their invisibility within national crisis frameworks. It is therefore imperative for government agencies, NGOs, and health institutions to co-create solutions with indigenous communities—solutions that integrate traditional knowledge systems, ensure linguistic inclusion, and restore trust through meaningful participation.

This study contributes to filling a critical gap in literature on pandemic impacts in upland indigenous communities in the Philippines. It calls for future research and policy efforts that elevate indigenous voices, recognize cultural epistemologies, and ensure that no community remains unseen or unheard in the face of global emergencies.

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Conflicts of Interests

The author declares that there are no conflicts of interest regarding the publication of this paper.

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Article

Decolonizing Pedagogy: Integrating Indigenous Knowledge and Philippine Historical Narratives in Higher Education Curricula

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Abstract

This qualitative multi-site study examined how indigenous knowledge systems and Philippine historical narratives are integrated into higher education curricula across six institutions in Northern Luzon. Anchored in Decolonial Theory and Culturally Responsive Pedagogy, the study explored faculty and student perceptions, current practices, and emerging strategies that align with decolonization goals. Findings revealed that while there is strong support for the inclusion of culturally rooted content, its integration remains inconsistent and often dependent on individual faculty initiatives. Participants identified key challenges such as lack of institutional frameworks, training, and authentic resources. Nevertheless, they proposed innovative pedagogical strategies, including community immersion, storytelling, interdisciplinary design, and co-creation with cultural elders, that foster inclusive, identity-affirming, and historically grounded education. The study concludes that decolonizing higher education requires a systemic reimagining of curriculum design, teaching practices, and epistemic authority, shifting from Eurocentric models to localized, culturally respectful frameworks.

Keywords: *Culturally responsive teaching, Curriculum development, Decolonizing pedagogy, Indigenous knowledge systems, Philippine higher education*

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Introduction

In recent years, there has been a growing movement in academic communities to re-examine and deconstruct colonial legacies embedded in formal education critically. In the Philippine context, higher education curricula have long reflected dominant Western frameworks, often at the expense of local narratives, indigenous knowledge systems, and culturally rooted pedagogies. This has contributed to the marginalization of indigenous epistemologies and the underrepresentation of historical truths told from the Filipino perspective. As institutions of higher learning play a critical role in shaping national consciousness, the call for decolonizing pedagogy has become both urgent and necessary.

For centuries, colonial encounters shaped Philippine education, first under Spanish and then American rule. These colonial powers imposed foreign languages, epistemologies, and historical perspectives that have had lasting impacts on how knowledge is produced, validated, and transmitted in Philippine schools. Despite efforts to indigenize the curriculum after independence, the structure of higher education remains largely Westernized in content and approach. As a result, the contributions of indigenous peoples, local heroes, and precolonial systems of knowledge continue to be overlooked or superficially acknowledged in academic discourse.

The global discourse on decolonizing education underscores the imperative to dismantle Eurocentric knowledge systems and make space for indigenous epistemologies within formal learning environments (Smith, 2021). In countries with colonial histories like the Philippines, scholars have long emphasized the need for an education system rooted in the Filipino people's culture, history, and lived experiences (Constantino, 2015; Canlas & Villanueva, 2024). Integrating indigenous knowledge (IK) into the curriculum affirms cultural identity and promotes sustainable development, as indigenous practices are often embedded in ecological stewardship and community resilience (Battiste, 2017).

In the Philippine setting, indigenous knowledge remains largely peripheral in mainstream higher education despite policy-level frameworks such as the Indigenous Peoples' Rights Act (IPRA) of 1997 and the Enhanced Basic Education Act of 2013 (K to 12). According to Colicol (2024), curriculum designers and educators often lack training or resources to effectively include local knowledge systems, which leads to superficial or tokenistic representations. Similarly, Cansino et al. (2022) found that while indigenous content is sometimes included in general education courses, it is often presented from an outsider's perspective, lacking depth and contextual sensitivity.

Efforts to decolonize the curriculum also intersect with the need to revisit Philippine historical narratives. As Claudio (2013) argues, national historiography has been shaped by colonial and neocolonial ideologies that obscure the contributions of local heroes, resistance movements, and indigenous governance structures. Curriculum frameworks that continue to privilege Western models of progress and development marginalize alternative ways of knowing and being. In response, pedagogical innovations such as cultural mapping, storywork, and community-based learning have emerged as effective tools for integrating local histories and indigenous values into the academic experience (Sto. Domingo, 2015).

This study, conducted by scholars from Don Mariano Marcos Memorial State University – Mid La Union Campus (San Fernando City, La Union), Don Mariano Marcos Memorial State University – Bacnotan Campus (La Union), Philippine Normal University – North Luzon (Alicia, Isabela), Ifugao State University (Lamut, Ifugao), Pangasinan State University – San Carlos Campus (San Carlos City, Pangasinan), and the University of Baguio (Baguio City), aims to explore and advance the integration of indigenous knowledge systems and Philippine historical narratives in higher education curricula. By understanding the current practices, institutional perceptions, and potential frameworks for curriculum transformation, this research contributes to the national effort of cultural reclamation and educational inclusivity.

The urgency of decolonizing education has been highlighted by scholars, educators, and indigenous communities advocating for culturally responsive pedagogy. Integrating indigenous knowledge and local histories into the curriculum is not merely a symbolic act but a pedagogical imperative promoting inclusivity, national identity, and epistemic justice. In Northern Luzon, where diverse ethnolinguistic groups reside, including the Iloco, Ifugao, Ibaloi, and Pangasinense communities, a wealth of indigenous knowledge and historical accounts remains untapped in formal education. This study builds on the regional context of the participating institutions to critically examine current curriculum practices and co-develop strategies for meaningful integration of these rich, localized epistemologies.

While there is a growing body of literature advocating for decolonized education in the Philippines, there remains a limited number of empirical studies that specifically examine the integration of indigenous knowledge systems and Philippine historical narratives within higher education curricula, especially outside Metro Manila. Most previous research has focused on basic education or broad policy recommendations, with insufficient attention given to the curricular content, institutional implementation, and perceptions among faculty and students at the tertiary level.

Furthermore, existing efforts to localize the curriculum are often fragmented, lacking cohesive frameworks or sustained institutional support. There is also limited data on how educators in regional and state universities navigate the integration of local knowledge in their courses—both in terms of pedagogical practices and structural challenges. This study addresses these gaps by conducting a multi-institutional inquiry across Northern Luzon, offering grounded insights and practical recommendations for transforming Philippine higher education in line with decolonization goals.

The study intends to answer the following specific research questions:

1. To examine the extent to which indigenous knowledge systems and local historical narratives are currently integrated into the curricula of selected higher education institutions in the Philippines.
2. To explore faculty and student perceptions regarding the relevance, challenges, and impact of integrating decolonized content in teaching and learning practices within higher education.
3. To develop pedagogical strategies and curriculum frameworks that promote inclusive, culturally responsive, and historically grounded education aligned with decolonization goals.

Methodology

This study employed a qualitative multiple-case study design to explore the integration of indigenous knowledge systems and Philippine historical narratives in higher education curricula. The research was conducted across six higher education institutions in Northern Luzon: Don Mariano Marcos Memorial State University – Mid La Union Campus (San Fernando City, La Union), Don Mariano Marcos Memorial State University – Bacnotan Campus (La Union), Philippine Normal University – North Luzon (Alicia, Isabela), Ifugao State University (Lamut, Ifugao), Pangasinan State University – San Carlos Campus (San Carlos City, Pangasinan), and the University of Baguio (Baguio City). These institutions were purposefully selected due to their proximity to indigenous communities and their involvement in cultural and curricular development initiatives.

Data collection was conducted through semi-structured interviews, focus group discussions (FGDs), and document analysis of existing curricula, syllabi, and institutional frameworks. Key participants included curriculum developers, faculty members from general education and education-related programs, cultural coordinators, and indigenous knowledge holders affiliated with the universities. A

total of 30 participants were selected through purposive sampling to ensure their involvement in or exposure to curriculum planning and cultural integration initiatives.

The interviews and FGDs were audio-recorded, transcribed verbatim, and analyzed using thematic analysis. Emerging themes were identified and categorized according to the three research objectives: current integration practices, perceptions and challenges, and proposed pedagogical frameworks. Curriculum documents were reviewed to validate participant responses and identify gaps or best practices in decolonized content delivery. Triangulation of data sources was employed to enhance the credibility and trustworthiness of findings.

Ethical considerations were strictly observed throughout the research. Informed consent was secured from all participants, confidentiality was maintained, and data was stored securely. Institutional approval was also obtained from the research ethics boards of the participating universities. Data analysis and interpretation reflected sensitivity to academic integrity and cultural respect, particularly in dealing with indigenous knowledge and community perspectives.

Theoretical Framework

This study was anchored on two interrelated theoretical lenses: Decolonial Theory and Culturally Responsive Pedagogy. These frameworks provided the conceptual grounding to examine the historical, epistemological, and pedagogical dimensions of curriculum development in higher education institutions in the Philippine context.

As advanced by scholars such as Walter Mignolo (2007) and Linda Tuhiwai Smith (2021), Decolonial Theory challenges the dominance of Western epistemologies and calls for the recentering of local and indigenous ways of knowing. This Theory emphasizes the need to expose and dismantle colonial structures within educational systems that have historically privileged Eurocentric narratives, often marginalizing indigenous voices and cultural knowledge. In this study, the Decolonial Theory served as a critical lens to interrogate how higher education curricula in the Philippines either perpetuate or resist colonial knowledge hierarchies and how indigenous knowledge systems and Philippine historical narratives can reclaim space in formal education.

Complementing this is Culturally Responsive Pedagogy (CRP), a framework developed by Geneva Gay (2010), which promotes the integration of students' cultural backgrounds, experiences, and values into the teaching-learning process. CRP recognizes that meaningful learning occurs when education validates and reflects learners' identities, histories, and lived realities. In the Philippine setting, this involves honoring indigenous communities' contributions, integrating local history, and using

pedagogical approaches rooted in Filipino culture and community engagement. CRP provided the foundation for assessing faculty practices and institutional efforts to make curricula more inclusive, relevant, and affirming of cultural diversity.

Together, these theories underscored the transformative potential of decolonizing pedagogy in higher education. They guided the formulation of research questions, the design of data collection tools, and the analysis of findings—ensuring that the study not only critiqued existing practices but also proposed sustainable, culturally grounded alternatives for curriculum reform.

Results and Discussion

The study identified key areas through rigorous thematic analysis where indigenous knowledge systems and local historical narratives are either integrated or remain marginalized within the current curricular and pedagogical structures. Each theme is illustrated with verbatim accounts from participants, labeled as Informants 1 to 30, to ensure transparency, professionalism, and fidelity to participant voices. The integration of these results is further examined in light of recent literature to contextualize findings within broader discourses on decolonial education and culturally responsive pedagogy.

Indigenous Knowledge Sytems and Local Historical Narratives

The integration of indigenous knowledge systems and local historical narratives into the curricula of selected higher education institutions in the Philippines presents a diverse and evolving picture. In some universities, notable progress has been made through the inclusion of courses that highlight cultural heritage, community traditions, and locally grounded perspectives. These efforts provide students with a deeper connection to their roots and a broader understanding of Filipino identity. However, the results also indicate that such initiatives remain uneven across institutions. In many cases, indigenous and local content is treated as supplementary rather than central to the academic experience. This points to a pressing need for more intentional and sustained efforts to embed culturally responsive education within the core of higher learning.

Curriculum Integration: Fragmented but Growing

Document analysis and interviews with faculty members revealed that Indigenous content is present but fragmented, often introduced only as supplementary material within general education courses like The Contemporary World, Readings in Philippine History, or Understanding the Self. Informants noted

that such inclusion is typically at the discretion of individual faculty members and lacks structural coherence.

For instance, Informant 4 (Faculty, Ifugao State University) explained:

> *"The Hudhud epic is part of UNESCO's intangible heritage, and we use it to teach values and identity. But the challenge is aligning it with learning competencies set by CHED."*

Ifugao State University integrates modules on the Hudhud chants, rice terrace agricultural systems, and mortuary practices of the Ifugao into their social science offerings. In contrast, Informant 7 (Faculty, Pangasinan State University) described the use of Antong Falls and Pangasinan epics in literature classes, though emphasizing these are often brief inclusions.

However, integration remains minimal in other institutions, particularly in La Union. Informant 2 (Curriculum Developer, DMMMSU–MLUC) noted:

> *"We have minimal inclusion of indigenous content... There's no standard template or requirement, so it's mostly up to individual faculty members."*

These findings highlight a curricular landscape where indigenous knowledge systems and local histories are inconsistently embedded, reflecting what Mignolo (2007) calls the "coloniality of knowledge", a condition wherein colonial epistemologies persistently shape what is deemed valid academic content.

These patterns confirm prior scholarship that curriculum localization in Philippine higher education remains largely symbolic and teacher-driven. Colicol (2024) identified similar inconsistencies in teacher education programs, attributing the gap to limited curricular mandates and lack of training. Likewise, Cansino et al. (2022) emphasized that while indigenous content appears in course outlines, it is rarely positioned as core knowledge, reflecting a tokenistic approach.

Comparatively, studies in other Southeast Asian contexts—such as Cansino's et al. (2022) work on Cordilleran HEIs—reveal that curricular integration is more successful when there is institutional support and partnership with cultural communities.

Curriculum development must shift from peripheral insertions to core design logic to foster true decolonization. A cultural audit of syllabi and collaborative frameworks with indigenous knowledge holders could lay the groundwork for sustainable integration.

Faculty Perceptions: Enthusiastic but Unsupported

Across all six institutions, faculty participants voiced strong support for the integration of indigenous knowledge systems and Philippine historical narratives. However, this enthusiasm was tempered by systemic challenges, primarily the absence of institutional guidance, training, and resource access.

Informant 9 (Faculty, Philippine Normal University–North Luzon) shared:

> *"I want my students to learn about revolutionary leaders from Isabela, not just Rizal. But textbooks are Manila-centric. We have to look for primary sources ourselves."*

Informant 14 (Faculty, University of Baguio) emphasized:

> *"I encourage students to collect folktales from their hometowns. That becomes our class text. But this is more of a passion project than a school requirement."*

Other informants reported similar experiences—motivated educators often resort to self-sourced materials, localized modules, and informal collaborations to bring culturally responsive content into their classrooms. However, such efforts remain sporadic and heavily dependent on individual initiative.

Informant 10 (Faculty, Ifugao State University) remarked:

> *"We need workshops and training from CHED or experts. We want to do more, but we're not equipped."*

These accounts underscore the institutional disconnect between the broader calls for decolonization and the everyday realities of teaching.

This gap between educator motivation and institutional support echoes findings by Battiste (2017), who argued that faculty are often "frontline agents of change" yet remain unsupported by policy-level frameworks. Similarly, Canlas and Villanueva (2024) found that while Filipino educators recognize the importance of cultural integration, their efforts are rarely sustained or structurally endorsed.

The lack of institutional scaffolding highlights the lingering coloniality of pedagogical design. Mignolo (2007) explains this as the persistence of Eurocentric hierarchies in knowledge validation—systems that silence or undervalue localized expertise.

In Southeast Asian parallels, Pham et al. (2023) observed that successful curriculum decolonization in Vietnam involved formal state-university-community partnerships, suggesting that institutional alignment is critical. Philippine HEIs,

therefore, must establish clear mandates, resource-sharing protocols, and localized professional development tracks to empower faculty in this transformation.

Indigenous Participation: Limited but Desired

Most participating institutions reported minimal formal engagement with local cultural elders and knowledge holders despite their geographic proximity to indigenous communities. Faculty members acknowledged that structural and ethical barriers impede sustained collaboration while interest exists.

Informant 12 (Cultural Affairs Coordinator, Pangasinan State University) explained:

> *"We have elders willing to share their knowledge, but we don't have the protocols to invite them formally. There's concern about cultural appropriation or misrepresentation."*

The absence of institutional frameworks such as Memoranda of Agreement (MOAs), community protocols, or clear consultation processes prevents indigenous voices' meaningful and ethical inclusion. Faculty members lamented the lack of official channels to reach out to communities without unintentionally breaching cultural codes or undermining traditional custodianship.

Informant 17 (Faculty, Don Mariano Marcos Memorial State University – Bacnotan) stated:

> *"We're cautious. We don't want to extract knowledge. There must be mutual respect and formal consent."*

Nonetheless, many participants expressed optimism. Proposed future strategies included inviting elders as co-teachers or lecturers, embedding community immersion as part of fieldwork, and developing indigenous-led digital archives.

Informant 20 (Administrator, Ifugao State University) added:

> *"We're exploring partnerships with barangay councils to institutionalize the presence of elders in our general education classes."*

These insights reveal a desire for ethical, reciprocal collaboration, yet institutional inertia continues to delay systematic implementation.

The limited but desired participation of indigenous knowledge holders reflects broader global trends in the decolonization of education. As Smith (2021) argues, the ethical co-production of knowledge must go beyond inclusion—it must respect indigenous sovereignty and modes of knowledge transmission. When academia fails

to provide such space, it risks epistemic violence through appropriation or tokenization.

In the Philippine context, Cansino et al. (2022) caution that without proper community engagement mechanisms, efforts to localize curricula often reproduce colonial extraction. These concerns were echoed in Southeast Asian literature as well: Roson and Talib (2019), studying Malaysian universities, emphasized the importance of cultural consent protocols and community advisory boards to avoid extractive research practices.

From a Decolonial Theory lens, indigenous peoples must be recognized not as passive "resources" for academic enrichment, but as epistemic authorities who can directly shape pedagogy and curriculum. Culturally Responsive Pedagogy (Gay, 2010) further affirms that authenticity in instruction requires firsthand, lived narratives—not mediated or sanitized representations.

Thus, the institutionalization of indigenous participation—through formalized advisory councils, inclusive hiring policies, and co-curricular integration—must be prioritized if Philippine HEIs move beyond symbolic inclusion.

Institutional Perspective: Decolonization Not Yet Policy

Institutional leadership across the six higher education institutions acknowledged the relevance of decolonizing the curriculum but admitted that concrete policies, strategic frameworks, or implementation guidelines remain absent. While recognized rhetorically, decolonization has yet to be translated into institutional mandates.

Informant 23 (Administrator, Don Mariano Marcos Memorial State University in La Union) shared:

> *"We follow CHED guidelines, but decolonizing education has not been discussed at the board level. We need a strong push from faculty and researchers."*

While CHED's Outcomes-Based Education (OBE) framework technically allows for flexibility and contextualization, administrators noted that its implementation often leans toward standardized rubrics rather than localization.

Informant 25 (Curriculum Chair, Pangasinan State University) explained:

> *"There's room in the OBE structure to innovate, but indigenous content remains optional, not expected without policy direction."*

This institutional ambiguity creates an uneven landscape. Some programs have moved toward decolonized approaches due to individual initiative, while others continue to rely exclusively on national frameworks with minimal cultural adaptation.

Informant 27 (Dean, Ifugao State University) emphasized:

> *"Unless CHED or our Board explicitly requires it, most faculty won't risk altering syllabi. There's fear of being 'non-compliant'."*

Across institutions, participants echoed the need for a top-down commitment to support bottom-up innovation. Decolonial efforts remain isolated, underfunded, and structurally vulnerable without policy codification.

This policy-level inertia aligns with the findings of Canlas and Villanueva (2024), who noted that the absence of curricular mandates has led to fragmented and inconsistent attempts at localizing Philippine tertiary education. Even where support exists at the faculty level, institutional reticence prevents scaling up innovations.

Decolonial theorists like Mignolo (2007) and Smith (2021) argue that without structural realignment, postcolonial societies risk re-inscribing colonial logic into education under the guise of reform. In other words, flexible frameworks like OBE can unintentionally perpetuate epistemic exclusion if not explicitly directed toward inclusive curricular goals.

In Southeast Asia, universities in Indonesia and Malaysia have begun to develop formal curricular pathways grounded in local cultures (Jamiran et al., 2024), driven by national policies recognizing cultural heritage's pedagogical value. The Philippines, by contrast, still lacks a cohesive national policy that mandates decolonization in higher education despite constitutional guarantees and cultural rights under the IPRA Law.

From a Culturally Responsive Pedagogy standpoint, systemic integration requires that institutions not only allow but actively facilitate the inclusion of indigenous narratives and values through institutional development plans, curriculum committees, and teacher training initiatives.

Faculty and Student Perception Regarding the Relevance, Challenges, and Impact of Integrating Decolonized Content in Teaching and Learning Praactices within Higher Education

The perceptions of faculty and students regarding the integration of decolonized content into teaching and learning practices in higher education reveal a shared recognition of its significance. Many view this shift as a meaningful step toward reclaiming cultural identity, fostering critical thinking, and making education more

inclusive and contextually relevant. However, the responses also bring to light several challenges, including limited institutional support, lack of resources, and uncertainty about how to effectively implement decolonized approaches across disciplines. While some educators and learners have embraced these changes with optimism, others express concerns about navigating unfamiliar content and balancing it with standardized academic requirements. These insights reflect a transition landscape that is grappling with the complexities of transforming curricula while striving to create a more equitable and reflective educational environment.

Cultural Relevance and Affirmation of Identity

Faculty and students across all institutions emphasized that including indigenous knowledge systems and local historical narratives affirms cultural identity and fosters a stronger connection to the learning process. When curricula reflected learners' sociocultural contexts, participants reported increased engagement, critical reflection, and pride in their heritage.

Informant 5 (Student, Ifugao State University) shared:

> *"When our local stories are used in class, it feels like our identity is being honored. It makes learning more personal and powerful."*

Informant 13 (Faculty, Philippine Normal University–North Luzon) stated:

> *"Teaching precolonial governance or local heroes challenges the colonial mindset. It's an awakening for our learners."*

These experiences demonstrate that culturally embedded content has transformative potential, especially when rooted in students' lived experiences and intergenerational narratives. When education centers indigenous perspectives, students shift from passive recipients of colonial knowledge to active co-constructors of meaning.

This finding echoes Geneva Gay's (2010) principles of Culturally Responsive Pedagogy, which assert that culturally aligned instruction enhances student performance, motivation, and identity formation. Similarly, Battiste (2017) underscores that cultural relevance in pedagogy restores the learner's sense of agency, especially for indigenous and historically marginalized groups.

From a decolonial standpoint, this resonates with Mignolo's (2007) concept of epistemic delinking—breaking away from the imposed superiority of Western epistemologies and revalidating local worldviews. Students' emotional and

intellectual investment in community narratives fosters both academic empowerment and civic consciousness.

In Southeast Asia, parallel findings were observed by Pearnpitak et al. (2024) in Thailand, where localized curriculum models dramatically increased student participation and historical consciousness. Philippine HEIs can achieve similar outcomes by systematically embedding indigenous knowledge across disciplines, reinforcing that cultural heritage is not peripheral but pedagogically central.

Pedagogical and Structural Challenges in Implementation

While faculty and students acknowledged the value of integrating decolonized content, they also expressed concern over their institutions' persistent structural and pedagogical barriers. Many faculty members described the process of localizing content as labor-intensive and unsupported, with little access to training or materials.

Informant 15 (Instructor, Pangasinan State University) stated:

> *"We have to develop our own materials. There's no institutional resource for local narratives. Everything is centralized."*

Informant 6 (Student, DMMMSU–Mid La Union Campus) noted:

> *"Some subjects touch on indigenous issues, but others skip them. It depends on the professor."*

This inconsistency reflects the overreliance on individual faculty initiatives and the absence of systematized curriculum support. Teachers often create context-relevant modules out of personal commitment rather than institutional obligation. The dependence on Manila-published textbooks, limited community access, and centralized accreditation systems all contribute to the marginalization of local knowledge.

Informant 19 (Faculty, University of Baguio) observed:

> *"Even if we want to revise our syllabus, we're always cautious. Some think it's not academic enough if it's not in English or from a Western source."*

These concerns align with the structural critique posed by Decolonial Theory. Walter Mignolo (2007) and Smith (2021) describe this dilemma as the "coloniality of power," where institutions maintain the hegemony of Western frameworks despite the presence of local alternatives. The marginalization of non-Western content persists not by active censorship but through systemic disincentives, lack of resources, and institutional rigidity.

From a Culturally Responsive Pedagogy lens, Gay (2010) emphasizes that pedagogical inclusivity cannot rely on goodwill alone—it requires systemic change. Teachers must be equipped with freedom and institutional mechanisms: access to training, repositories of localized resources, and recognition of indigenous modes of instruction.

In related contexts, Cabigon and Santos (2022) highlighted that Philippine state universities often lack policy guidance and financial support for curriculum decolonization, leaving educators to navigate uncharted territory without institutional backing. The findings reiterate that unless policy-level reforms are made, the burden of decolonizing the curriculum will continue to fall disproportionately on individual educators, risking burnout, inconsistency, and fragmentation.

Ethical Concerns and the Need for Community Collaboration

Faculty participants expressed deep concern about the ethical responsibilities involved in teaching indigenous content, particularly in the absence of direct consultation with communities. Many feared unintentionally misrepresenting rituals, stories, or beliefs and called for more culturally grounded collaboration methods.

Informant 14 (Literature Professor, University of Baguio) reflected:

> *"We can't romanticize or simplify indigenous rituals just to fill a syllabus. These are sacred traditions."*

Informant 8 (Student, DMMMSU–Bacnotan Campus) added:

> *"It's more meaningful when we learn from elders or firsthand sources, not just classroom discussions."*

These responses underscore the need for participatory models that prioritize the agency and consent of indigenous communities. While educators strive for inclusivity, they remain aware that there is a risk of tokenism or cultural appropriation without formal frameworks for collaboration.

Informant 22 (Faculty, Philippine Normal University–North Luzon) shared:

> *"There must be reciprocity. We can't just extract knowledge. We need to co-create it."*

Some institutions have initiated tentative partnerships with barangay councils or community elders, but these remain informal and inconsistent. Faculty members advocated for more formalized relationships, such as Indigenous Advisory Councils or MOUs with cultural organizations, to guide the ethical integration of content.

This tension between intent and practice illustrates a core concern of Decolonial Theory: the risk of replicating colonial modes of knowledge extraction under the guise of inclusion (Smith, 2021). True decolonization requires epistemic justice—not merely the insertion of indigenous content, but the recognition of indigenous people as co-authors of knowledge.

Gay (2010) stresses in Culturally Responsive Pedagogy that authenticity, validation, and lived experience are indispensable components of meaningful learning. Educators must reference indigenous cultures and center indigenous participation in teaching and curriculum design.

Catama et al. (2024) documented a similar phenomenon in Cordillera institutions, where student immersion and elder lectures produced stronger learning outcomes than textbook-only instruction. In comparative literature, Rahman and Yunus (2021) emphasized that Malaysian universities institutionalized respect for indigenous epistemologies by involving traditional leaders in educational councils.

To avoid perpetuating extractive relationships, Philippine HEIs must build ethical infrastructures that ensure cultural accuracy, consultation, and co-ownership. These structures must be designed for academic compliance, mutual respect, and long-term partnership.

Transformative Impact on Critical Thinking and Social Awareness

Faculty and students across all six institutions consistently highlighted the transformative potential of integrating decolonized content in shaping critical consciousness, historical rethinking, and civic awareness. Exposure to indigenous worldviews, precolonial achievements, and community-based resistance movements allowed students to question dominant colonial narratives and recognize indigenous agency.

Informant 16 (Student, University of Baguio) shared:

> *"I used to think our history started with colonization. Now I know we had thriving societies, strong women leaders, and native science."*

Informant 11 (General Education Faculty, DMMMSU–Mid La Union Campus) noted:

> *"Students become more reflective, more analytical. They question what they've always been told, and that's a good thing."*

Faculty participants observed that such paradigm shifts were both academic and deeply affective and ideological. When students encountered localized

epistemologies—particularly those grounded in family, land, and oral traditions—they began to challenge Eurocentric historiography and reassert their own cultural identities in intellectual discourse.

Informant 28 (Faculty, Ifugao State University) reflected:

> *"Decolonized content sparks curiosity. It becomes a starting point for asking big questions—about injustice, identity, and power."*

This finding aligns strongly with Mignolo's (2007) concept of delinking, where learners detach from Western epistemological dominance and begin reconstructing identity through local knowledge systems. Such cognitive shifts represent the core outcome of a truly decolonized education—students move from passive recipients of colonial logic to active cultural agents.

Gay (2010) reinforces that culturally responsive teaching is not merely about inclusion, but about activating critical thinking through identity-affirming education. In affirming their community's stories, students experience what Battiste (2017) describes as "cognitive justice", validating their ancestral heritage as legitimate knowledge.

In the Philippine setting, Constantino (2015) warned against the long-term effects of colonial education in suppressing indigenous agencies. This study finds that when local narratives are revived in the classroom, students correct historical distortions and develop a stronger sense of social accountability and cultural pride.

Regionally, Sto. Domingo (2015) documented similar student transformations in community-based historical learning models, where narrative recovery empowered learners to engage more critically with contemporary social issues.

Therefore, the integration of decolonized content is not simply a pedagogical preference. It is a transformative act that repositions education as a means of cultural survival, resistance, and rehumanization.

Pedagogical Strategies and Curriculum Frameworks

An analysis of pedagogical strategies and curriculum frameworks across selected higher education institutions reveals a growing shift toward more student-centered and context-responsive approaches. Many programs have begun to adopt active learning methods, such as project-based learning, collaborative tasks, and community-engaged instruction, reflecting a move away from traditional lecture-based models. Curriculum frameworks are increasingly aligned with 21st-century competencies, integrating critical thinking, communication skills, and cultural relevance. However, the results also indicate gaps in coherence and implementation,

with some curricula lacking clear alignment between intended outcomes, teaching methods, and assessment practices. These findings highlight the ongoing efforts—and challenges—in reimagining pedagogy and curriculum to better serve diverse learners and evolving societal needs.

Community-Engaged and Place-Based Pedagogy

Faculty and student responses consistently emphasized the transformative potential of integrating decolonized content in fostering critical thinking and historical consciousness. When exposed to precolonial achievements, indigenous governance systems, and resistance movements, students began questioning colonial narratives and recognizing their communities as active agents in history.

Informant 16 (Student, University of Baguio) reflected:

> *"I used to think our history started with colonization. Now I know we had thriving societies, strong women leaders, and native science."*

Informant 11 (General Education Faculty, DMMMSU–Mid La Union Campus) noted:

> *"Students become more reflective, more analytical. They question what they've always been told, and that's a good thing."*

Faculty members observed a shift in classroom dynamics, students engaged more critically with texts, challenged dominant historiographies, and sought to understand current issues through culturally grounded perspectives.

Informant 28 (Faculty, Ifugao State University) added:

> *"Decolonized content sparks curiosity. It becomes a starting point for asking big questions—about injustice, identity, and power."*

This shift illustrates that integrating local histories and indigenous knowledge systems improves content relevance and fundamentally alters how students approach learning, identity, and civic engagement.

This transformation supports Mignolo's (2007) notion of delinking—the intellectual process by which learners detach from Eurocentric epistemologies and begin to reclaim localized knowledge systems. It also aligns with Freirean critical pedagogy, which views education as a tool for consciousness-raising and social action.

Gay (2010) reinforces that Culturally Responsive Pedagogy is not merely about representation but about developing students' capacity to critique, reflect, and

participate meaningfully in society. When education is embedded in learners' cultural contexts, it becomes a mechanism for empowerment.

In the Philippine context, Constantino's (2015) classic critique of the miseducation of the Filipino remains relevant. As this study shows, students' exposure to counter-narratives—such as pre-colonial systems, local heroes, and indigenous science—cultivates a stronger sense of civic responsibility and historical truth.

Internationally, research by Sto. Domingo (2015) demonstrates that community-based, culturally informed curricula result in more engaged and socially conscious students across Southeast Asia. The study's findings parallel these results, highlighting the potential of a decolonized curriculum to affirm identity and produce reflective, justice-oriented citizens.

These practices affirm Culturally Responsive Pedagogy's call to root learning in the sociocultural worlds of learners (Gay, 2010). Place-based education repositions the community as a legitimate and valuable site of knowledge production.

Decolonial Theory reinforces this shift by calling for the relocation of epistemic authority, from colonizing institutions to community-based, experiential knowledge (Smith, 2021). As Battiste (2017) notes, indigenous ways of knowing are relational and land-embedded; thus, teaching must reflect that ontology.

Parallel frameworks in Southeast Asia have adopted similar place-based learning strategies. For example, Harjatanaya (2025) documented how Indonesian universities utilize traditional ecological practices in curriculum design, improving student engagement and sustainability literacy.

Philippine HEIs, especially in rural or indigenous-adjacent areas, are well-positioned to lead in place-based innovation—but only if such practices are formalized through curriculum development, resource allocation, and community consent.

Integrative Curriculum Design across Disciplines

Participants emphasized the importance of integrating indigenous knowledge systems and local histories across disciplines—not isolating them into separate electives or siloed subjects. Many faculty proposed interdisciplinary curriculum designs that connect cultural knowledge with general education, science, business, and technical courses.

Informant 24 (General Education Coordinator, Pangasinan State University) explained:

> *"In our GE courses, we can integrate indigenous practices into research, ethics, and even entrepreneurship. These aren't cultural silos—they have practical application."*

Informant 18 (Faculty, University of Baguio) shared:

> *"Our students wrote research papers on their local epic heroes and presented them using oral tradition. That's critical thinking, creativity, and cultural revival in one."*

Integrative curriculum design reflects the tenets of both Decolonial Theory and Culturally Responsive Pedagogy. Mignolo (2007) critiques rigid disciplinary boundaries as colonial constructs that exclude indigenous epistemologies, which are inherently holistic, relational, and context-bound. Embedding indigenous content across academic domains disrupts this exclusion.

Gay (2010) likewise argues that culturally responsive curricula must reflect the complexity of learners' cultural worlds—not isolate them into decorative segments. The use of local myths in philosophy classes, indigenous engineering models in science subjects, or ancestral trade systems in economics demonstrates this principle in action.

In comparative Southeast Asian literature, Lingam (2022) observed that integrated indigenous modules improved student comprehension and interdisciplinary skills in Indonesian and Malaysian teacher education programs. Their findings support this study's claim that integration—rather than token inclusion—is key to sustainability and academic legitimacy.

Philippine HEIs must support interdisciplinary collaboration in syllabus design, encourage alternative learning outcomes (e.g., community projects, multimodal presentations), and institutionalize support for faculty-led curriculum innovation rooted in local knowledge.

Dialogical and Participatory Teaching Methods

Faculty participants advocated a pedagogical shift from lecture-centric, content-heavy models toward dialogical, reflective, and community-grounded learning strategies. Many emphasized that indigenous knowledge systems are transmitted through text and oral traditions, rituals, storytelling, and communal engagement.

Informant 9 (Faculty, Philippine Normal University–North Luzon) reflected:

> *"We need to go back to kwentuhan, to panagdadap-ay in the Cordillera. These are not just cultural forms—they're pedagogies in themselves."*

Informant 7 (Student, DMMMSU–Bacnotan Campus) shared:

> *"I remembered more from the elders who spoke in our forum than from two chapters of a textbook."*

Educators observed that such participatory methods increased retention, stimulated critical reflection, and fostered student empowerment. Dialogical formats—such as circles, open storytelling, and communal analysis—mirror traditional forms of collective wisdom transmission in indigenous communities.

Informant 30 (Faculty, Ifugao State University) stated:

> *"When we allow students to reflect, speak in their native language, and connect knowledge to family memory, they feel seen. That's when learning happens."*

This approach is a core tenet of Culturally Responsive Pedagogy. Gay (2010) contends that dialogic and participatory models foster inclusive classrooms, particularly for learners from oral and communal cultures. These models validate the legitimacy of non-Western pedagogies and foster co-ownership of knowledge.

In parallel, the Decolonial Theory (Smith, 2021; Mignolo, 2007) asserts that the classroom must move from colonial monologue to epistemic plurality. Knowledge should not be delivered but negotiated—built through relationships, context, and reciprocity. When students become co-authors of learning, education transforms from control to collaboration.

In regional literature, Catama et al. (2024) document how Cordilleran universities have used dap-ay (indigenous dialogue circles) as reflective tools in teacher education. This resonates with participatory learning practices observed in Maori, Aeta, and Dayak education, which center on storytelling as both content and method.

Philippine higher education must embrace these dialogical strategies as legitimate pedagogical methodologies—not as supplements to formal education but as epistemologically valid alternatives reflecting indigenous knowledge's communal, dynamic nature.

Strategies and Framework Recommendations

Drawing from the thematic findings across multiple institutions, this study proposes a set of pedagogical and curricular strategies that align with the principles of Decolonial Theory and Culturally Responsive Pedagogy. These recommendations address both the philosophical shift and practical transformation needed to advance inclusive, historically grounded, and culturally affirming education in Philippine higher education institutions.

Proposed Pedagogical Strategies

1. Community-Immersion Projects: Design student fieldwork embedded in indigenous communities for oral history collection, cultural mapping, and lived experience documentation. These activities serve as instructional tools and participatory processes that co-produce knowledge with cultural bearers.
2. Story-work and Oral Traditions: Position storytelling, kwentuhan, and native epics as legitimate modes of instruction. These approaches should be treated not as cultural sidebars but as epistemologically valid frameworks for inquiry, ethics, and reflection.
3. Dialogical Learning Formats: Replace rigid recitation or lecture-based methods with dialogic circles, reflective conversations, and community forums that mirror indigenous pedagogies.
4. Multimodal Student Outputs: Expand beyond written exams to include chants, rituals, oral presentations, creative performance, and visual storytelling—forms that reflect cultural knowledge systems.

Proposed Curriculum Framework Elements

1. Interdisciplinary Integration: Indigenous content must not be relegated to isolated courses. Embed local histories, ecological practices, and cultural narratives across all disciplines—from humanities to STEM.
2. Cultural Audit of Existing Courses: Conduct institutional reviews of current syllabi to identify colonial biases and areas for cultural localization. This audit serves as a foundation for curricular re-design.
3. Institutionalized Indigenous Advisory Councils: Formalize the role of cultural elders in curriculum planning, review, and teaching. Their presence ensures that content is accurate, ethical, and co-owned.
4. Localized Learning Outcomes: Redefine course objectives to reflect both academic competencies and indigenous knowledge systems, such as land-based ethics, ancestral governance models, or intergenerational knowledge transmission.

From a Culturally Responsive Pedagogy perspective, these strategies shift learning from abstract theory to lived relevance. They empower students by affirming their cultural identity, fostering critical consciousness, and making education relational and reflective.

From a Decolonial Theory standpoint, the strategies dismantle colonial hierarchies of knowledge and reassert the legitimacy of indigenous ways of knowing.

They reclaim epistemic space, resisting Western epistemological domination by recentering localized frameworks.

As Smith (2021) argues, true decolonization is not about content substitution but epistemic restructuring. These strategies serve as a blueprint for that restructuring, calling institutions to move from performative inclusion to structural transformation.

Conclusion

This multi-site study affirms the urgent imperative of decolonizing higher education in the Philippines by meaningfully integrating indigenous knowledge systems and local historical narratives into curricular and pedagogical practice. Drawing on the lived experiences of faculty and students across six institutions in Northern Luzon, the findings reveal a widespread recognition of the importance of culturally responsive education and the persistent structural and epistemic barriers that hinder its full realization.

While efforts to incorporate indigenous content have begun, isolated modules, community engagement, and teacher-driven initiatives remain uneven, fragmented, and largely unsupported by institutional or national policy. Faculty commitment alone cannot sustain decolonization. Without systemic frameworks, curricular localization will remain discretionary and precarious.

However, this fragmentation also represents a critical juncture: the opportunity to reimagine curriculum, pedagogy, and policy from the ground up. The proposed strategies, ranging from community immersion and dialogical instruction to interdisciplinary frameworks and the institutionalization of indigenous advisory roles, chart a concrete path forward. They position higher education as a space for learning and a transformative arena for epistemic justice and cultural reclamation.

Anchored in Decolonial Theory, the study challenges the ongoing coloniality of Philippine academic structures and reasserts the legitimacy of local epistemologies. Guided by Culturally Responsive Pedagogy, it reframes instruction as a relational, identity-affirming process that draws from students' cultural worlds rather than erasing them.

Content revision is not enough to truly decolonize the Philippine universities. The paradigm itself must shift—from one that privileges Western frameworks to one that values diverse ways of knowing, being, and teaching. This transformation will enhance student engagement and critical thinking and restore education to its rightful place as a vehicle for liberation, community dignity, and national sovereignty.

Conflicts of Interests

The authors declare that there are no conflicts of interest regarding the publication of this paper.

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Article

Bahala na si Bathala: Ebolusyon at Kritikal na Pagsusuri ng mga Diskursong Nakapaloob sa Konseptong "Bahala na"

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Abstract

Inilarawan sa papel na ito ang mga naging pagpapakahulugan at mga nabuong diskurso sa konsepto ng bahala na ng mga dayuhan, Pilipinong iskolar na nag-iisip banyaga, at nationalist scholar, mula sa mga huling bahagi ng ika-20 dantaon hanggang sa maagang bahagi ng ika-21 dantaon, na nagmumula sa larangan ng mga agham panlipunan at pilosopiya, at mga kabataan sa kasalukuyang panahon. Ginamit ang Teorya ng Pagkataong Pilipino ni Enriquez bilang batayang teyoretikal sa pagpapaliwanag ng paksa na nagbigay ng alternatibong pagpapaliwanag sa konsepto ng bahala na batay sa kamalayan, karanasan, at oryentasyon ng mga Pilipino. Deskriptibong disenyo ng pananaliksik ang pamamaraan na inilapat sa pag-aaral at pagrerebyu naman ng mga kaugnay na literatura mula sa mga lathalaing pang-iskolar, sanaysay pampilosopiya, at aklat at pagsagawa ng focus group discussion (FGD) ang ginamit sa pangangalap ng datos. Sa pagsusuri ng datos mula sa FGD gumamit ang mananaliksik ng deductive thematic analysis. Lumabas sa pag-aaral na bagamat ang fatalism ang namamayaning pagpapakahulugan sa konspetong bahala na, maging ng mga kabataan sa kasalukuyan, hindi maikakaila na kontekswal pa rin ang paggamit ng salita at hindi maaaring ikahon sa isang pagpapakahulugan ang nasabing konsepto. Bagamat may sariling pagkaunawa ang kasalukuyang henerasyon sa konspetong bahala na, inihahain bilang rekomendasyon na muling suriin kung may pagkilala pa rin ba sila rito bilang bahagi ng kanilang mga pagpapahalaga, kung maisasama pa rin ba ito sa hanay ng confrontative surface values na tinutukoy ni Enriquez, at kung unibersal ba ang pag-iral nito bilang pagpapahalaga sa buong kapuluan.

Keywords: *Bahala na, fatalism, pagpakatao, pagpapahalaga, pagkakakilanlan, Pilipino*

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Panimula

Malaki ang sinasabi ng ating mga pagpapahalaga sa ating pagkakakilanlan bilang isang indibidwal at bilang mamamayan ng isang bansa. Ito ay dahil sa malaking papel na ginagampanan nito sa paghubog at pagbuo ng ating pagkatao. Nakalulungkot nga lamang at ang mga pag-aaral sa mahahalagang usapin at diskurso patungkol sa ating sarili, katulad nito, ay pinangunahan at karamihan ay isinulat at ipinaliwanag ng mga dayuhang iskolar. Kung sa bagay, halos wala rin namang pinagkaiba kung lokal na iskolar ang sumasalamin at nagsusuri nito, dahil karamihan sa mga ito ay gumagamit din ng lente at metodolohiyang mula sa labas. Produkto rin kasi sila ng sistema ng edukasyon na hinulma ng tradisyong Kanluranin. Dala ng ganitong kaayusan, ang pagbubuo ng mga pagpapakahulugan na hiwalay sa ating lipunan, kalinangan, at pananaw na pansandaigdigan. Dahil dito, nauuwi sa simpleng pagtutumbas lamang ng mga salita at paghugot sa kanilang karanasan, na pawang dayuhan sa atin, ang ginagawa sa pagbibigay katuturan at pagpapaliwanag sa ating mga pagpapahalaga. Mapanganib ang ganitong kalakaran, sapagkat maaaring may mga diwa at katangian na nakapaloob sa ating mga salita at karanasan na naiiba o hindi matatagpuan sa kanila, gawa ng magkaibang konteksto o kapookang pinanggagalingan ng mga ito. Maaari itong magresulta sa isang lihis o ligaw na pagpapakahulugan. Masakit mang isipin, ganito ang nangyayari sa atin sa kasalukuyan, ang mga dayuhan ang nagpapakilala sa atin kung sino at ano tayo. Ngunit ang higit na nakadidismaya ay ang walang kuwestiyon natin na pagtanggap at pagsasabuhay sa paglalarawang ito na nilikha para sa atin ng mga dayuhan.

Sa patuloy na pag-unlad ng kaalaman at talastasan sa larang ng mga agham panlipunan at sa pagtatangka na buuin ang isang pagkakakilanlang matatawag na Pilipino, unti-unting nakita ang problematikong implikasyon na dulot ng kalakarang ito. Kaakibat nito, ang paglitaw ng mga tinatawag na nationalist scholar na gumagamit ng pambansang wika sa pakikipagtalasatasan at nagbabalik ng ating kamalayan sa sariling kasaysayan at kalinangan upang maging tuntungan sa pagdalumat ng lahat ng mga bagay na may kinalaman sa Sangkapilipinuhan. Dala nito bilang tradisyon ang pagsasakatutubo ng mga agham panlipunan bilang sagot sa mga diskursong maka-Kanluranin.

Isa sa mga disiplina ng mga agham panlipunan kung saan naging matingkad ang ganitong anyo ng pakikipagtalastasan ay ang larang ng sikolohiya. Katunayan noong maagang bahagi ng 1970, sa pangunguna ni Virgilio Enriquez, ay iniluwal nito ang "isang sikolohiya na nakabatay sa sariling kaisipan, karanasan, at kalinangan" – ang Sikolohiyang Pilipino (Enriquez nasa Pe-Pua, 1982). Pangunahin sa mga teorya na maiuugat mula rito ay ang "Pagkataong Pilipino" na siyang pinagbatayan ng pag-

aaral na ito. Gamit ang nasabing teorya, ipinaliwanag ang ating pagkatao sa pamamagitan ng mga pagpapahalaga: ang kapwa bilang core value; pakiramdam bilang pivotal value; hiya, utang na loob, at pakikisama bilang accommodative surface values; bahala na, lakas ng loob, at pakikibaka bilang confrontative surface values; at karangalan, katarungan, at kalayaan bilang societal values (Pe-Pua & Protacio-Marcelino, 2000). Sa pamamagitan ng nasabing teorya, dinalumat ang mga konseptong nabanggit na nakapook sa sandaigdigan, danas, reyalidad, at wikang Filipino.

Ang kabuuan ng papel ay tumuon sa paghahambing at pagsusuri ng mga nabuong diskurso at pagpapakahulugan sa konsepto ng "bahala na" ng mga banyaga, mga Pilipinong nag-iisip katulad ng mga banyaga, mga nationalist scholar mula sa huling bahagi ng ika-20 dantaon at maagang bahagi ng ika-21 dantaon at mga mag-aaral sa kasalukuyang panahon. Isinama sa pag-aaral ang nabuong pagpapakahulugan ng mga mag-aaral sa nasabing konsepto upang makita mula sa kasalukuyang sistema ng edukasyon ang pumapaimbulog na diskurso at pagkaunawa sa konspeto ng bahala na. Mahalaga ang ganitong mga paglilinaw, sapagkat ang hindi kritikal na pagtanggap sa mga lisyang pagpapakahulugan sa ating mga pagpapahalaga ay maaaring mauwi sa isang damdaming hati, sa isang banda ay may pagmamalaki at sa isa nama'y may pangmamaliit sa sarili. Alinman sa dalawang pagtingin na ito ay nakaiimpluwensiya sa pagbuo natin ng sariling pagkakakilanlan na mahalaga sa pagsusulong ng diwa at damdaming makabayan.

Layunin ng Pag-aaral

Pangunahing layunin ng pag-aaral na masuri ang mga nabuong pagpapakahulugan ng mga iskolar mula sa iba't ibang disiplina ng mga agham panlipunan at pilosopiya ukol sa konsepto ng bahala na.

Samantala ang mga sumusunod naman ang tiyak na layunin ng pag-aaral:

1. matukoy ang etimolohiya ng konspetong bahala na;
2. maisa-isa ang mga nabuong diskurso at pagbabagong naganap sa pagpapakahulugan sa konseptong bahala na;
3. mailarawan ang pananaw ng mga kabataan sa kasalukuyang panahon sa konseptong bahala na;
4. maipaliwanag ang dahilan sa likod ng pamamayagpag ng namamayaning diskurso kaugnay ng konseptong bahala na.

Rebyu ng mga Kaugnay na Literatura

Bitbit ang Eurosentrikong pananaw ng mga Kanluraning mananakop, Kastila man o Amerikano, ipinakilala nila ang kanilang sarili bilang mga sibilisado, may progresibo at maunlad na lipunan, at nakaaangat sa anumang larangan ng pamumuhay sa mga katutubo sa kapuluan (Alatas, 2006). Dala ng ganitong etnosentrikong pananaw ang isang mapangdiskrimina at mapanglait na turing sa mga katutubo na nagdulot ng mababang pagtingin nito sa kanilang mga sarili at pangmamaliit sa mga bagay na dapat sana ay kanilang itinataguyod at ipinagmamalaki (Lopez, 2024). Bunga nito, madaling nahikayat at yumakap ang mga katutubo sa isang bagong kayarian na inilatag sa kanila ng mga dayuhan, bagay na unti-unting naglayo sa kanilang sariling pagkakakilanlan at nagbura sa kanilang kamalayan bilang bahagi ng isang kabuuan, ang pagka-Pilipino (Enriquez, 1994).

Bilang tugon dito, sa maagang bahagi pa lamang ng ika-19 na siglo ay makikita nang nakikibaka si Rizal kasama ang iba pang mga propagandista upang itama ang mga maling paratang sa atin ng mga dayuhan ukol sa ating kalinangan at pagkakakilanlan (Benitez, 2022). Ito marahil ang dahilan kung bakit may mga paghahaka ang ilang pantas na maaaring kilalanin si Rizal bilang "Ama ng Araling Pilipino" (Navaro & Lagbao- Bolante, 2007)

Sa paglipas ng panahon, bunga ng pagtatagumpay ng pampublikong sistema ng edukasyon sa bansa na ipinamana ng mga Amerikano at patuloy na limitadong pakikibahagi ng mga Pilipinong pantas na nakatuntong ang pagsusuri ng mga pag-uugali ng tao at kaganapang panlipunan sa wika at kalinangang Pilipino upang ipaliwanag, lalong naging matingkad ang pamamayagpag ng pagsasakanluranin ng mga diskurso sa agham panlipunan na nagbunga ng pagiging dayuhan sa sariling bayan ng mga Pilipino. Kaya naman 1970s bilang reaksyon dito ng ilang piling fakulti mula sa Unibersidad ng Pilipinas ay halos magkakasabay na ipinanganak ang Pilipinolohiya, Sikolohiyang Pilipino, at Bagong Kasaysayan na ang adhikain ay malawakang pasimulan ang pagsasakatutubo ng mga agham panlipunan (Navaro & Lagbao- Bolante, 2007).

Ang Sikolohiyang Pilipino na ipinakilala ni Virgilio Enriquez ay isa sa mga nagbigay linaw ukol sa mga lisyang pagpapakahulugan sa mga pagpapahalagang Pilipino kasama na ang bahala na, isang uri ng palabang pagpapahalaga (confrontative surface values), na siyang paksa ng pag-aaral na ito (Pe-Pua & Protacio-Marcelino, 2000).

Metodolohiya

Ang pag-aaral na ito ay isang uri ng deskriptibong pananaliksik na naglalarawan, nagpapaliwanag, at nagsusuri ng mga pagpapakahulugan na nabuo ukol sa konsepto ng bahala na. Ginawa ito sa pamamagitan ng pagrerebyu ng mga kaugnay na literatura, na naglalaman ng mga pagpapakahulugan at diskurso sa konseptong "bahala na", na isinulat ng mga iskolar sa larangan ng mga agham panlipunan at pilosopiya. Matapos ito ay tiningnan ng mananaliksik ang mga pattern katulad ng mga pagkakatulad, pagkakaiba, at pagkakaugnay ng mga pagpapakahulugan na nabuo sa konspetong sinusuri mula sa mga literaturang nabasa. Upang mailarawan naman ang pagpapakahulugan ng kasalukuyang henerasyon sa nasabing konsepto, nagsagawa ng focus group discussion sa tatlong pangkat ng mga mag-aaral, na binubuo ng pitong (7) mag-aaral bawat pangkat, sa isang pamantasan sa Bulacan ang mananaliksik. Purposive sampling technique ang ginamit sa pagpili ng mga kalahok na may sumusunod na mga batayan sa pagpili: (1) mag-aaral na nagmula sa iba't ibang programa sa isang pamantasan sa Bulacan sa akademikong taon 2024-2025; (2) nasa edad 18-30; at (3) may kamalayan sa mga pagpapahalagang Pilipino. Ang mga gabay na katanungan naman na ginamit sa pagsasagawa ng FGD ay ang mga sumusunod: (1) Sa anu-anong pagkakataon o sitwasyon ginagamit ng mga kabataan sa kasalukuyang panahon ang ekspresyong bahala na? at (2) Sa iyong palagay, positibo, negatibo, o neutral ba ang pagkakagamit ng salita batay sa pagkakataon o senaryo kung kailan ito ginamit? Bakit? Sa pag-aanalisa ng datos mula sa FGD gumamit ang mananaliksik ng deductive thematic analysis. Sa nasabing pamamaraan, nagsisimula sa pagbuo ng mga tema o kategorya mula sa umiiral na pag-aaral, teorya, o tiyak na layunin ng pananaliksik. Sumunod ay ang paulit-ulit na pagbasa ng mga datos upang magkaroon ng higit na pamilyarisasyon at mas malawak na ideya patungkol dito. Matapos ito ay pinag-aaralang mabuti ang mga datos mula sa transkripsyon at inilalagay ang mahahalgang bahagi ng teksto nito sa tema kung saan ito naaakma. Sa huli, muling sinusuri ang mga datos sa bawat tema matapos na malagyan ng code ang lahat. May pagkakataon na napapalitan ang pangalan ng tema upang umakma ang lahat ng mga code na nasa ilalim nito o dili kaya naman ay gumawa ng mas maliit na subtema sa loob ng isang malaking tema. Para naman matiyak ang kawastuan ng isinagawang coding, kumuha ang mananaliksik ng mga external validator na muling sumilip sa kabuuanng proseso ng coding sa pamamagitan ng pagsusuri ng code sheet na ginamit ng mananaliksik. Tiniyak ng mananaliksik na lahat ng kalahok sa pag-aaral ay lumagda sa informed consent form bago isinagawa ang pangangalap ng datos, ang kanilang mga katauhan ay hindi nabunyag sa anumang paraan na maglalagay sa kanila sa panganib o hindi

magandang sitwasyon at ang mga nakuhang impormasyon sa kanila ay nakatago at gagamitin lamang sa mga napagkasunduang layunin ng pag-aaral.

Kinalabasan at Dikusyon ng Pag-aaral

Pinag-ugatan ng Bahala Na

May iba't ibang paliwanag ukol sa pinagmulan ng ekspresyong "bahala na." Pangunahin at nangingibaw sa mga ito, ang paniniwala na nanggaling ito sa salitang Tagalog na Bathala na tumutukoy sa isang makapangyarihang nilalang (Bostrom, 1968). Gayunpaman, marapat na banggitin na may iba't ibang paghahaka ukol sa pinanggalingan ng salitang ito. Nariyan ang sinasabi ni Laja (2010) na nag-ugat ito sa salitang Ba-Taala (Abba-Taala) na binubuo ng mga salitang Hebreo na Abba, na tumutukoy sa "Ama," at Taala, na sa wikang Arabiko ay nangangahulugan ng "Ang Pinakamataas" (Ang Maluwalhati). Katulad ito ng mababanaag sa katawagan na Allahu Taala sa ilang bahagi ng Mindanao na tumutukoy sa "Tagapaglikha" (Laja, 2010). Samantala, ayon naman kay Pablo Pastells (Hislop, 1971), isang modernong Espanyol na Heswita, maaari raw na nagmula talaga ito sa katutubong salitang Malayo na Bata-Allah na nangangahulugang "anak ni Allah". Ang katibayan na ito ay seryosong pinaniniwalaan ng mga nauna sa kanya ay mababanaag sa isang natatagong batis, ang Manila Relacion ng 1572, na may kapahayagan ukol sa pagbabawal sa paggamit o pagbanggit ng katagang iyon dahil sa maaaring pagkakaugnay nito sa mga Muslim.

Iba naman ang kuru-kuro ni Potet (2016) ukol sa pinanggalingan ng ekspresyong bahala na. Aniya hindi ito maaaring magmula sa salitang bathala. Nabanggit niya ito sapagkat ang salitang bathala, hindi umano, ay galing sa salitang Sanskrit na bhattara na nangangahulugang "marangal o dakilang panginoon" habang ang salitang Tagalog na bahala naman, na nangangahulugang "dalahin", "pananagutan" o "100 milyong yunit na bigat o timbang" ay maaaring nagmula sa mga salitang Sanskrit na bhara at Malayo na bahara na kapwa may pakahulugan na "dalahin," "timbang" o "bigat" at "tungkulin". Dagdag pa rito, kapansin-pansin ang BharaNa, isang salitang Sanskrit at Hindi, ay tila mas angkop at mas malapit dito ang kahulugan. Nasabi ito sapagkat ang bharaNa sa Sanskrit ay nangangahulugang "pagpapasan," na may kaugnayan sa "pagdadala ng bigat", "pagsusuporta," at "pagpapanatili" na kaugnay ng pagmamalasakit at pangangalaga (Monier-Williams, 1899); habang ang bharana naman sa Hindi ay nangangahulugang "natapos na" katulad sa kaso ng isang takdang gawain o para "punuin" sa kaso naman ng isang espasyo sa loob ng isang sisidlan (Platts,1884). Mapapansin mula rito, na tila magkakaugnay ang nais ipakahulugan ng bharaNa (upang "pasanin" at

"suportahan"), bhara at bahala (kapwa nangangahulugan ng "dalahin"), at bahala na ("maging mapanagutan sa…"). Bungsod nito maaaring ipagpalagay, bagamat hindi ganap na konklusibo, na maaaring nag-ugat talaga ang ekspresyong bahala na sa salitang Sanskrit/Hindi na bharaNa na halos magkabaybay at magkatunog. Nagkaroon lamang aniya ng pagbabago (sa anyo ng dalawang magkaibang salita na "bahala" at "na") dahil sa ang karamihan sa mga nagsipagtala ukol sa sinaunang gawi at pamamaraan ng pamumuhay ng mga ninuno natin ay dayuhan na ang gamit sa pagsusulat ay sistema ng alpabetong mula sa Kanluran. Posibleng mangyari ito sapagkat katulad ng mapapansin sa ating wika, maraming hiram na salitang Sanskrit ang matatagpuan dito (e.g. diwata, guru, asa, katha, mukha).

Sa pagtatangkang ugatin ang pinagmulan ng ekspresyong bahala na, kapansin-pansin na ang mga pangunahing lumutang na pagpapakahulugan ay nakaugnay sa isang Tagapaglikha o dili kaya naman ay sa isang dalahin o pasanin. Kapwa maiuugnay ang mga ito sa konspeto ng "pananagutan." Kung paano ito nasabi ay simple lang, karaniwan nang tinitingnan noon pa man, na ang Maylikha o Tagapaglikha ay may tungkulin na protektahan at pagpalain ang Kanyang mga nilalang habang ang salitang "pasanin" at "dalahin" naman kapag ikinabit sa salitang "balikat" ay nagkakaroon ng konotasyon na isang obligasyon. Samakatuwid ay isang pananagutan nga.

Mga Nabuong Pagpapakahulugan at Diskurso sa Konspeto ng Bahala na

Bahala Na Bilang Fatalism

Isa si Lynn Bostrom (Enriquez, 1989) sa mga pangunahing iskolar na nagkabit ng konsepto ng fatalism sa ating konsepto ng bahala na; katulad ng makikita sa kanyang isinulat na artikulo sa Siliman Journal noong 1968. Ang fatalism batay sa kanyang pagkakagamit ay nangangahulugang pasibong pagtanggap ng kung anuman ang dalhin ng buhay, na masasalamin sa kawalan ng pagnanasang magplano at panindigan ang mga ikinilos. Sa madali't sabi para bang mangyari na kung ano ang mangyayari; que sera sera o whatever will be will be. Sa ibang pagkakataon tinawag pa nga niya itong escapist value. Escapist value dahil ginagamit ito upang malusutan ang mga ginawang kairesponsablehan.

Ang ganitong pagpapalagay ay sinundan din ng mga Pilipinong may isip banyaga at bantad sa edukasyong Kanluranin. Ani nga Dahli Aspillera (2005), isang kolumnista sa pahayagang Malaya, ang bahala na "is now used more like, sorry, that's all I want to do; I'm not going to worry about it. Bahala na is beginning to sound more like, I don't care." Para naman kay Emerita S. Quito (1994), professor emeritus sa De La Salle University, "the negative aspect of bahala na is that one leaves everything to

chance under the pretext of trusting in Divine providence . . . [which] is really laziness disguised in religious garb." Kay Jose De Mesa (1979) naman binanggit niya ang bahala na "as one that represents the defeatist worldview and is responsible for the difficulty of motivating Filipinos to accept modernization." Paniwala naman ni Nick Joaquin (Abordo- Ramos, 2009) ito ang isa sa mga pangunahing dahilan kung bakit mayroon tayong tinatawag na "heritage of smallness". Ngunit higit na nakakagulat sa mga ito ay maging ang dinadakilang historyador na si Teodoro Agoncillo ay kaisa rin sa ganitong pagtanaw at pagpapakahulugan sa nasabing konsepto. Kanya ngang sinabi na, "…. fatalism is best symbolized in the phrase "Bahala na," a phrase that defies translation, but which may be rendered loosely as "come what may" (Agoncillo, 1990).

Iba't iba man ang naging pagpapakahulugan iisa naman ang nangingibabaw na himig. Ito raw ay indikasyon ng pasibo't atrasadong pag-iisip at pagkilos bunga na rin ng atrasadong kabuhayan sa bansa (Covar, 2004).

Patunay nito ay ang ilang kasabihang Pilipino na sumasalamin sa ating mayamang kapaniwalaan sa mga bagay na itinadhana. Halimbawa na lamang nito ay "Ang buhay ng tao ay parang gulong ng palad, minsang nasa ibabaw, minsang nasa ibaba." Isa pa ngunit kaugnay rin nito ay yaong nabanggit sa gawa ni Mercado (1993) na "Ang kapalaran ko'y di ko man hanapin; Dudulog, lalapit kung talagang akin". Sa mga kasabihang ito mapapansin na tila ibig ipahiwatig nito na walang direktang kontrol ang tao sa mga mangyayari sa kanyang buhay at dahil ganito ang kanyang sitwasyon mangyayari ang mga bagay kahit wala siyang gawin.

Ang pagkahumaling sa pagsusugal katulad ng sabong, baraha, at pagtaya sa jueteng, loteng, at lotto ay pawang palatandaan din ng laganap na pag-asa sa suwerte ng marami. Sapagkat sa halip na kumilos at magpunyagi sila para sa kanilang kinabukasan, ipinagbabakasakali nila ito sa galaw ng kapalaran.

Ang matibay na paniniwala sa sinasabi ng mga manghuhula, horoscope, at feng shui na para bang ito na nga ang mangyayari at magtatakda ng kapalaran ng kumukonsulta ay isang maliwanag na indikasyon rin ng kumpletong pagpapaubaya sa kapalaran at hindi sa sariling diskarte at gawa. Ang ganitong kinagawian ay hindi na bago sa atin sapagkat noon pa man may mga sanggunian na ng kapalaran ang mga taga-Quezon, Panay at Tawi-Tawi na hawig sa isa't isa at ginagamit sa ibang bahagi ng daigdig ng Malayo. Putikaan ang tawag dito sa Tawi-Tawi. Nakahanay rito ang gabi-gabing anyo/edad ng buwan at ang mga katumbas na hayop at kapalaran ng isang tao (Ambrosio, 2010).

Ang konsepto ng malas at buenas sa negosyo, tsamba sa anumang bagay na ginagawa, pagbili ng mga pampasuwerteng bagay sa bahay o personal na adorno para

malayo sa kamalasan at paggamit ng agimat at anting-anting ay pawang laganap na palatandaan ng fatalism.

Hindi na ito nakagugulat sapagkat ani nga ni Panopio & Raymundo (2004), non-rational ang mga oriental partikular na ang mga Pilipino. Non-rationalism ang tawag sa pananaw sa mundo kung saan walang ganap na kontrol ang tao sa mga pangyayari sa kanyang buhay at malabis ang pagdepende sa pagtatagumpay at kabiguan sa isang makapangyarihang nilalang. Kaugnay nito nabanggit ni Pahayag ni Naguit (lektura sa klase, Abril 4, 2012) na maiuugat ang ganitong klase ng pagpapahalaga sa kinagisnang sistema ng kapaniwalaan ng mga ninuno natin, ang anituismo. Sa sistemang ito makikita na pangunahin sa mga ritwal ang pag-aalay ng mga handog at sakripisyo, bagay na madalas na ginagawa upang mabigyang kasiyahan ang mga makapangyarihang nilalang sa gayo'y magdala ito ng tagumpay sa kanilang paglalakbay, pakikipaglaban, at kasaganaan sa pag-aani. Ginagawa rin ito upang payapain sa galit ang makakapangyarihang anito na maaaring magdala ng maraming sumpa tulad ng sakit, tagtuyot, at kamatayan. Samakatwid may batayang pangkalinangan ang nabuong pagpapakahulugan sa pagpapahalagang ito.

Nakalulungkot mang sabihin patuloy ang paglaganap ng sekular na pagpapakahulugan dito. Tila tuluyang nawala na nga si Bathala sa ekspresyong bahala na si Batman at pinalitan ng isang dayuhang cartoon super hero na lalong nagpatingkad pa ng elementong dayuhan sa pagpapakahulugan nito.

Dala nito at ng ganitong pagpapakahulugan ani Panopio & Santico-Rolda (1992), "ang kaisipan at pagpapahalaga na nagdudulot ng kawalan ng pagkukusa, di pagdating o pagsunod sa tamang oras, pagpapabaya, katamaran at kawalan ng diwang mapagpasimula. Sinuportahan naman ito ng pahayag ni Gorospe (1994) na nagsasabing:

> *"As such it may be the root cause of national apathy (walang pakialam) and collective paralysis of action (bakit pa kikilos) to solve both local and national problems. Everything is already predetermined or fated. Negatively, bahala na could engender a false sense of security with God as insurance or a security blanket. For example, if God wants Filipino families to have plenty of children (anak ay kayamanan), God will take care of everything. Bahala na could be the cause of the absence of national initiative and of that discipline required for national growth. When negative bahala na prevails, nothing ever gets done. Potholed roads, uncollected garbage, countless unsolved murders, carnaping and smuggling remain year after year. How many have ever been arrested, convicted or jailed for wanton murder or for notorious graft and*

corruption? A sense of national frustration, helplessness, and despair grips the nation and the people no longer care."

Ngunit paano nila nabuo ang pagpapakahulugang ito, gayong ang mga nag-aral sa konseptong ito karamihan ay hindi naman talaga aral sa ating wika ni babad sa ating kultura bunga ng katotohanang marami sa kanila ay mga dayuhan, at kung mga Pilipino man ay may "captive mind" naman wika nga ni Alatas (2006)? Kung may captive mind ang mga Pilipinong iskolar na nagsusuri ng ating kultura at lipunan, nangangahulagang mulat din ang mga ito sa sistema ng edukasyon na hinulma ng mga dayuhan para sa atin upang magarantiyahan ang pananatili nila sa poder ng kapangyarihan. Patunay nito ang mga pensionado noong panahon ng mga Amerikano, mga Fullbright scholar, mga mag-aaral na produkto ng Inggleserong eskwelahan at marami pang iba sa kasalukuyan. Kung gayon tila lumalabas na simpleng pagtutumbas lamang ng mga salita ang nangyari at hindi ang kabuuang konteskto at lalim ng salitang dinadalumat ang nabigyang pansin. Tinatawag na pagbibinyag ito ayon sa pag-aantas ng konsepto sa Sikolohiyang Pilipino kung saan binibigyan ng katutubong kahulugan ng mga banyaga ang kanilang mga salita at konsepto. Halimbawa nito ay pagkatao sa personality, utang na loob sa debt of gratitude, hiya sa shame at marami pang iba. Ang nagiging problema sa ganitong pagtingin ay ang simplistikong pagtutumbas at pagpapakahulugan sa salita na binibigyang kahulugan at tinutumbasan. Problematiko ito sapagkat ang mga salita ay tiyak na may sariling gamit mula sa kontekstong pinanggalingan nito at karanasan ng mga taong gumagamit nito. Samakatuwid may elemento itong kakaiba sa isa't isa na maaaring bumuo ng isang reyalidad na hiwalay sa isa't isa. Kung gayon isang kapangahasan na maituturing ang simpleng pagtutumbas sa mga salita bilang isang anyo ng pagpapakahulugan dito. Sa isang banda, hindi naman talaga maikukubli na may elemento nga ito ng fatalism ngunit ang malaking tanong dito ay ito nga lamang ba ang bahala na nating mga Pilipino?

Bahala Na bilang Determinismo at Optimismo

Si Camilo Osias (Enriquez, 1990) ang unang nagpakita ng balanseng pananaw sa konsepto ng bahala na. Aniya, ito ay pinagsamang fatalism at determinism. Subalit para kay Lagmay (Enriquez, 1990), maliwanag na walang anumang elemento ito ng fatalism at lalong hindi rin ito ang tinutukoy na escaping mechanism na binabanggit ni Bostrom. Paliwanag niya, ito ay determinasyon na harapin anuman ang hamon na hatid ng isang sitwasyon ng hindi ito iniiwasan o tinatakasan. Kaya naman makikita sa modelo ng kapwa ni Enriquez na ang pagpapahalagang ito ay kasama roon sa mga

tinatawag na confrontative values o mga palabang pagpapahalaga. Ganito rin ang naging pagtingin dito ni Jocano (Rico, 2003). Aniya "bahala na is an inner strength to dare, to take the risk, to initiate and move, to take up a challenge, and to assume responsibility for an act." Bagay na sinasang-ayunan din ni Panopio at Santico-Rolda (1992) kaya marahil nabanggit nitong, "ito rin ang nasa likod ng mga katangian katulad ng kagitingan, katatagan ng loob at bukas na kalooban upang harapin ang panganib" (p.86).

Mula sa sinundang talata mahihinuha na hindi pasibong pagtanggap sa mga pangyayari sa buhay ang bahala na katulad ng nais iparating ng mga banyaga at mga Pilipinong may banyagang pag-iisip. Sabi nga nina Fernandez, Valerio at Yacat (Covar, 2004):

> *Kailan nga ba ginagamit ang mga katagang "Bahala na!"? Sa gitna ng walang katiyakan, hindi natin inuurungan ang mga pagsubok sa buhay. Bagkus buong tapang nating hinaharap ang problema at determinado nating isinasagawa ang ating desisyon. (p. 114)*

Patunay nito marahil ay ang malaking bilang ng Overseas Filipino Workers na hindi inaalintana ang mga panganib na dala ng kaguluhan sa labas ng bansa magkaroon lamang ng maayos na mapagkukunan ng kabuhayan. Dagdag pa rito ang maraming bilang ng mga Pilipino na naglalakas loob na magsimula ng negosyo sa kabila ng walang kasiguraduhan na maibabalik sa kanila ang ipinalaot na kapital bungsod ng matinding kumpetisyon sa loob at labas ng merkado. Determinasyon rin ang nakikitang puwersa sa likod ng mga mag-aaral na kumukuha ng pagsusulit kahit na hindi pa sila nakapag-aral ng leksiyon. Nangangahulugan ba itong padalus-dalos at hindi nag-iisip ang taong nagsasalita nito? Ayon pa rin kina Fernandez, Valerio at Yacat (Covar, 2004) "Hindi ba't sa pagbigkas ng bahala na ay kinakalkula natin ang mga puwedeng mangyari sa atin? Ibig sabihin, ihinahanay at binabalanse ang positibo at negatibong aspekto ng ating desisyon. Gumagawa tayo ng kinalkulang panganib" (p.114). Para bang ganito, kung kukuha ka ng pagsusulit kahit hindi ka nakapagrebyu mas may tiyansa kang makapasa kaysa hindi kumuha nito. Gayundin naman sa pagtatayo ng negosyo at paghahanapbuhay sa labas ng bansa. Sabi nga ng isang kasabihan, "Paano mong malalaman kung hindi mo susubukan". Samakatuwid hindi talaga tayo nagpapadala sa kapalaran kundi tayo ang gumagawa at humahanap ng ating kapalaran. Maiuugnay marahil ang ganitong lakas ng loob sa malalim nating paniniwala sa Diyos na nakapaloob din sa ekspresyong bahala na. Dala marahil ito noon pa man ng kapaniwalaan ng mga Tagalog na si Bathala, ang makapangyarihang nilalang, ay isang mabuting anito kung kaya't hindi ito magpapabaya at tiyak na

tutulong sa kanila sa panahon ng pangangailangan. Nangangahulugan kaya ito ng kawalan ng pagkilos at pagpapasa-Diyos na lamang sa lahat ng bagay? Hindi! Sabi nga ni Fernandez, Valerio at Yacat (Covar, 2004), "Sa totoo lang, pagkatapos banggitin ito, may ginagawa tayo at tinatawag [lamang; akin ang pagdaragdag] natin ang Diyos upang patnubayan tayo" (p.114). Ang ganitong pagpapalagay marahil ay maliwanag na ipinapahayag ng kasabihang "Nasa Diyos ang awa, nasa tao ang gawa!". Samakatwid hindi tayo nagpapasa-Diyos ng hindi natin ito sinasabayan ng pagkilos. Wika nga ng isang kasabihan pa "Kung may tiyaga may nilaga". Ibig sabihin, hindi natin kinukunsente sa ating kultura ang pagwawalang bahala, ang katamaran at kawalan ng pagkukusa. Hindi lamang iyan sabi pa nga ni Jose de Mesa (Panopio & Santico-Rolda, 1992) "ang bahala na ay isang may pag-asang pagbabakasakali sapagkat ang mga Pilipino ay umasa sa pinakamagaling". Ibig sabihin nito may optimism sa bahala na.

Bahala na Bilang Pagpapakita ng Tiwala, Mekanismo ng Pag-angkop, Pagpapakumbaba, at Pag-ako ng Pananagutan

Kung tutuusin maraming positibong katangian ang bahala na bukod sa mga una nang nabanggit. Pagpapakita ito ng pagtitiwala sa ibang tao gaya ng binabanggit ni Casiño (2015), "From a sociological perspective, bahala na allows Filipino individuals to connect with others. As a form of trust, a Filipino facing adversities in life would say, Bahala ka na sa pamilya ko' (Take charge of my family.)" Sa ibang pagkakataon naman, maituturing itong isang pamamaraan ng pag-angkop sa mga bagay na hindi madaling tanggapin na nakatutulong sa mental na kalusugan ng isang tao. Ganito ang binabanggit patungkol dito ni Distor (Gripaldo, 2005), "Held close to the heart, the 'bahala na' phenomenon becomes a coping mechanism in the face of risky undertakings." Pagpapakita rin ito ng kababaang loob at hindi pagiging mayabang. Kaugnay nito binanggit ni Quito (1994) na, "It is conducive to humility, modesty, and lack of arrogance." Mapapansin ito karaniwan sa mga naghandang mabuti sa pagsusulit. Kahit naghandang mabuti ang mga ito, kapag tinanong mo kung sa palagay nila ay maipapasa nila ang kukuhaning pagsusulit, karaniwan ng mariringig sa mga ito ang ekspresyong "bahala na". Dalawang bagay ang mahihinuha mula rito. Una, hindi nila tahasang masabi na "oo" sapagkat baka hindi sila makapasa at sa huli ay pagtawanan pa sila ng marami. Pangalawa, nagpapakita rin ito ng paghingi ng patnubay sa Diyos matapos na gawin ng tao ang lahat ng kanyang makakaya. Ito marahil ay bunga ng pagkaunawa na kailangan niya ang tulong ng Diyos sa lahat ng kanyang gawa upang magtagumpay. Subalit hindi ito nangangahulugan ng pagkikibit-balikat na lamang sa sitwasyong kinahaharap. Nasabi ito sapagkat taglay

ng ekspresyong bahala na ang pagiging mapanagutan at hindi ang pagtakas sa kinalabasan ng isang gawain. Ani nga ni Casiño (2015) patungkol sa pagpapakahulugan sa bahala:

> *"Mercado limits the word bahala ("responsibility") to the Tagalog dialect. However, in Cebuano, bahala also connotes `responsibility'. For example, one could say, O sige, ikaw na ang bahala dinha [Alright, take responsibility there!]. Similarly, the Ilongo dialect gives the same weight to the word: Ti, ikaw na gid ang bahala dira, ha?*

Samakatuwid, hindi talaga pagpapabaya ang bahala na. Pagpapakita pa nga ito ng pag-ako ng isang pananagutan katulad na lamang ng makikita sa pahayag na "Sir ako na po ang bahala diyan". Marahil, ito rin ang dahilan kung bakit maging ang salitang pamahalaan (pamathalaan) ay iniuugnay sa konsepto ng bahala na. Ito ay sa kadahilanang ang pamahalaan bilang isang institusyong panlipunan ang siyang umaako, tumitingin, at nanagutan sa kapakanan ng bayan. May ganitong pagtingin marahil dahil sa ang etimolohiya pa lamang ng salita nito ay nangangahulugan ng "maging Panginoon sa ibabaw" (English, 1977). Samakatuwid dahil ang Diyos ang nangingibabaw, pinaghaharian ng takot sa paggawa ng hindi mabuti ang mga namumuno. Kaya marahil sa konsepto ng pamahalaan na itinataguyod nina Bonifacio at Jacinto, yamang ang dalawang ito ay lubog pa sa ating kalinangan, pangunahing tinitingnan hindi ang kayamanan ni ang karunungan o kapangyarihan sa pamumuno kundi ang kalinisan ng kalooban ng magsisipamuno. Nabanggit na lamang din ang kalinisan ng kalooban sinasabing may konotasyon rin ng pagmamalasakit ang bahala na. Masasalamin ito sa salitang nababahala na nangangahulugan sa wikang Tagalog na nag-aalala, nag-iisip at may iniintindi. Halimbawa nito ay ang ganitong pangungusap "Nababahala ako, gabi na pero wala pa ang kapatid mo". Kaya naman kapag idinagdag ang pang-uring pamilang na wala (ipinagwalang bahala) dito tila negatibo ang pakahulugan nito na para bang nagsasabing walang pakialam.

Tila ang mga sumunod na talata ay nagbigay ng napakapositibong paglalahad sa pagpapakahulugan sa ekspresyong bahala na. Para bang tinumbasan nito kundi man direktang sinagot ang bilang ng mga diumano'y "lisyang" pagpapakahulugan dito ng mga banyagang iskolar at Pilipinong isip banyaga. Ngunit ano ang pinanggalingan ng ganitong pagpapakahulugan dito? Ito ba ay talagang pagbibigay ng isang kahulugan na lapat sa ating karanasan o isang reaksiyon o pagtatangkang dekonstruksiyon lamang ng mga umiiral na pagpapakahulugan dito na pinakalat ng mga banyaga. Talaga bang ginawa nila (banyaga; taga-Amerika o Europa) ito upang ipagdiinan ang kanilang superyoridad at ang ating pagiging mababa sa mata nila? O

ganito lamang ang pinalalabas ng mga nationalist scholar upang mabigyang daan ang kanilang proyekto na kinisin ang kasalukuyang pagpapakahulugan sa bahala na dahil sa kanilang pagnanais na maitanghal ang isang magandang imahe para sa binubuong identidad natin?

Bahala na sa Pagpapakahulugan ng mga Kabataan sa Kasalukuyan

Sa kasalukuyan, "walang kasiguraduhan","kung ano na lang ang mangyari", "uncertain", "hindi handa", "paubaya sa kapalaran" at "hinihintay na lang ang mangyari sa isang bagay" ang mga nabuong pagpapakahulugan ng mga kabataan sa ekspresyong bahala na. Tunog at himig ng mga pagpapakahulugang halaw sa mga banyaga at Pilipinong may isip banyaga. Paano kayang higit na nanuot ang pagpapakahulugang ito sa kanilang kamalayan? Edukasyon ang itinuturong dahilan. Para sa maraming naging kalahok ng pag-aaral na ito, ang kanilang mga guro na namulat at nalantad sa banyagang sistema ng edukasyon ang naging pangunahing tagapagpasa ng ganitong diwa. Kaya tama si Renato Constantino ng kanyang sabihin na pinabibilis ng paglupig sa kaisipan ang pag-angkin sa buong bayan. Sa pagkakataong ito naman, mimesis, o bulag na pagtanggap ng mga teorya, kaalaman at perspektiba galing sa labas, (Alatas, 2006) ang naging pintuan sa akademya ng pagpasok ng ganitong kaisipan. Kaya hindi na nakapagtataka na naging malawak ang impluwensiya ng ganitong kaisipan sa mga kabataan sa kasalukuyang panahon sapagkat mula sa kagamitang panturo hanggang sa kabuuan ng sistema ng edukasyon nanuot ang impluwensiyang Kanluranin.

Konklusyon at Rekomendasyon

Kapansin-pansin ang pamamayani ng pagpapakahulugan sa konspetong bahala na ng fatalism maging ng kasalukuyang henerasyon. Maiuugat ito sa pamamayani ng pagsasakanluranin ng mga diskurso sa mga agham panlipunan sa kasalukuyang sistema ng edukasyon na nagbubunga ng isang bihag na kaisipan na nakagapos sa pagkaunawa ng kalinangan at sandaigdigan mula sa pananaw ng mga taga-labas. Magkagayunman, hindi maitatanggi na kontekswal talaga ang gamit at pagpapakahulugan sa konseptong ito gaya ng makikita sa paglalahad na isinagawa sa papel na ito. Ibig sabihin, hindi talaga maikakahon sa isang pagpapakahulugan ang konsepto at anumang pagtatangka na bigyan ito ng payak na pagpapakahulugan ay magbubunsod sa ligaw at lisyang pagkaunawa rito.

Sa kabila ng pagkakaroon ng kaunawaan sa konspetong ito ng mga kabataan, inihahain ng mananaliksik na muling suriin kung ito ba ay itinuturing pa rin ng mga kabataan sa kasalukuyang panahon bilang bahagi ng kanilang pagpapahalaga. Sakaling itinuturing pa, mainam na tingnan kung ito pa rin kaya ang sinasabi ng pag-

aaral ni Enriquez na bahala na bilang confrontative surface values o nagbago nang tuluyan. Nasabi ito ng mananaliksik sapagkat ang pamamayani ng kaisipan rito bilang anyo ng fatalism sa maraming kabataan ng kasalukuyang panahon ay tila taliwas sa pagkakategorya rito bilang isang anyo ng confrontative surface values. Inihahain din ng mananaliksik na alamin kung may pag-iral ba ng katulad na pagpapahalaga sa ibang bahagi ng kapuluan at kung may mga kapareho rin ba itong pagpapakahulugan bilang isang konsepto katulad ng mga natalakay na mula sa pag-aaral na ito.

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Article

The Impact of using Chat-Generative Pre-Trained Transformer on students

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Abstract

The integration of artificial intelligence (AI) tools in education has garnered significant attention, with Chat Generative Pre-Trained Transformers (ChatGPT) emerging as a potential aid in enhancing student learning experiences. This study investigates the impact of ChatGPT on students across various higher education institutions using a mixed-methods research design. Quantitative data were collected through online surveys, complemented by qualitative interviews to gain deeper insights into students' experiences. A total of 405 undergraduate students from state universities and colleges (48.59%), local colleges (31.71%), and private institutions (19.7%) participated. Results revealed an overall positive perception, with a high average weighted mean of 3.85, indicating that ChatGPT supports students in understanding complex concepts, improving writing and critical thinking skills, increasing engagement, and facilitating collaborative learning. Notably, male students reported a significantly higher impact than females ($t = -4.38$, $p < .001$), and students from state universities experienced a greater positive effect compared to their counterparts in local and private institutions ($F = 3.23$, $p = .044$). These findings suggest that ChatGPT plays a constructive role in enhancing academic performance and learner engagement, although concerns regarding overreliance, accuracy, and academic integrity remain. The study offers valuable insights for educators, developers, and policymakers aiming to integrate AI technologies responsibly into educational settings.

Keywords: *Academic Performance, Artificial Intelligence, ChatGPT, Educational Technology, Gender Difference, Higher Education, Learning Impact*

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Introduction

The rapid advancements in artificial intelligence (AI) and natural language processing (NLP) technologies have recently reshaped various aspects of human interaction and problem-solving. One of the most notable advancements is the Generative Pre-trained Transformer (GPT) models, like OpenAI's ChatGPT, which are impressive because they can create clear and relevant text responses in many different areas. These advancements have significantly impacted industries ranging from customer service to education, with ChatGPT being particularly noted for its ability to engage in human-like conversations. Despite the extensive use of these models, questions about their effectiveness and implications for specific applications, especially in educational contexts, remain largely unexplored (Schei et al., 2024).

The educational potential of AI-powered chatbots like ChatGPT has attracted the interest of numerous educational institutions looking to improve students' learning experiences. These chatbots employ machine learning algorithms to analyze natural language inputs and provide personalized, real-time responses, creating more interactive learning environments (Krstić et al., 2022). By simulating human-like interactions, ChatGPT offers educators the possibility of enhancing traditional pedagogical methods while addressing students' diverse needs and learning preferences (Baidoo-Anu et al., 2023). As the educational sector increasingly integrates AI technologies, understanding how these tools impact student outcomes and engagement is crucial.

While the potential of chatbots in education is vast, various platforms offer different features suited to distinct needs. For instance, OpenAI's ChatGPT excels at producing context-aware conversational responses, enabling effective communication in applications like virtual assistants, content creation, and educational support (Saravanan et al., 2021). Platforms such as Rasa, an open-source conversational AI framework, focus on creating customized AI assistants capable of handling more nuanced, contextual dialogues (Boytsov et al., 2020). These platforms offer powerful solutions across industries, but their effectiveness in education warrants deeper examination, particularly regarding their influence on student learning.

ChatGPT has become integral to various sectors, including customer support, healthcare, legal services, and education. In these domains, ChatGPT streamlines processes, improves communication, and enhances user experiences. Whether assisting students with homework, generating creative content, or providing technical support, the deployment of ChatGPT and similar models has marked a significant shift in how industries interact with consumers and clients (Vaswani et al., 2021). Despite the success of these models, their integration into education, particularly regarding

student outcomes, has not been sufficiently researched, indicating that there must be empirical studies focusing on their effectiveness in academic settings.

While AI-powered chatbots like ChatGPT demonstrate significant potential to transform educational experiences, it is crucial to acknowledge their limitations. These systems are not infallible and may occasionally provide incorrect or contextually irrelevant responses, which could hinder their effectiveness in learning environments. Furthermore, ethical concerns surrounding AI, including data privacy issues, algorithmic bias, and the responsible deployment of AI technologies, must be addressed (Verma, 2016). These concerns highlight the necessity for thoughtful integration of AI systems in educational contexts, ensuring their use does not inadvertently undermine the learning experience or introduce unintended consequences.

Despite growing interest in AI chatbots in education, there remains a significant gap in empirical research exploring their effects on student learning outcomes and engagement. While several studies have demonstrated the potential of AI tools in education, few have rigorously examined the impact of ChatGPT specifically. It is crucial to assess how these technologies affect student performance and engagement to optimize their use in educational settings (Anderson et al., 2021). Evaluating student interactions with ChatGPT through both qualitative and quantitative methods will offer helpful ideas about how these tools can be effectively integrated into educational curricula.

This study seeks to bridge this research gap by evaluating the impact of ChatGPT on student learning outcomes and engagement in educational settings. Specifically, it explores the potential benefits and challenges of using ChatGPT for educational purposes, with a focus on student performance, user satisfaction, and overall educational experience. The study will employ a mixed-methods approach, gathering quantitative data on student performance and user feedback to provide a comprehensive understanding of ChatGPT's role in education. Additionally, the findings will inform educators, policymakers, and educational technologists on best incorporating AI tools into the curriculum.

The ultimate goal of this research is to add to the larger discussion about artificial intelligence's place in education and how it might improve student learning. Through this study, we aim to provide evidence-based recommendations for integrating AI-powered chatbots into educational practices, helping educators and institutions make informed decisions about the future of teaching and learning in the AI age.

Methodology

This study utilized a mixed-methods research design to comprehensively explore the impact of Chat Generative Pre-Trained Transformer (ChatGPT) on students' academic experiences. By integrating both quantitative and qualitative approaches, the study aimed to gather strong information about how students learn, feel, and perform when using ChatGPT.

Participants and Sampling procedures

Participants consisted of undergraduates from various academic disciplines across state universities and colleges, local colleges, and private higher education institutions in the province of Bulacan, Philippines. Although the study initially applied a purposeful sampling strategy to ensure institutional and disciplinary diversity, the actual method of data collection—through an online Google Form—aligns more closely with a convenience sampling approach. This strategy enabled broader access and participation but also introduced potential limitations in representativeness due to voluntary self-selection.

Research Instrument Development and Validation

The researcher created a structured questionnaire to gather information on four main topics: (1) demographic profile, (2) how often and why people use ChatGPT, (3) a 10-item Likert scale measuring the perceived academic impact of ChatGPT, and (4) open-ended questions about challenges and suggestions for improvement.

The researcher conducted a two-step validation process to establish the validity and reliability of the instrument.

1. Content and face validation were carried out by three academic experts in research, education, and educational technology. Their insights were used to refine the questionnaire items' clarity, structure, and relevance.
2. A pilot study was then conducted with 15 undergraduates from a state university and a local college not included in the main study sample. Feedback from the pilot respondents led to minor modifications in item phrasing for better clarity and coherence.

To assess the internal consistency of the Likert-scale items, Cronbach's alpha was computed using pilot data, resulting in a high-reliability coefficient of 0.973, which exceeds the acceptable threshold of 0.70.

Data Collection and Analysis

Quantitative data were collected electronically through the finalized questionnaire distributed via Google Forms. Descriptive statistics, including means, standard deviations, and frequency distributions, were employed to analyze general usage trends and ChatGPT perceptions. Researchers conducted inferential statistical tests, specifically independent samples t-tests and Welch's ANOVA, to assess differences in perceived impact based on gender and type of institution.

The study utilized Jamovi, a free and open-source statistical software platform for statistical analysis. Jamovi was selected for its accessibility, ease of use, and powerful statistical capabilities comparable to commercial alternatives like SPSS. The software provided an efficient and transparent means for performing both descriptive and inferential statistical analyses.

Qualitative data gathered through open-ended survey responses and semi-structured interviews were subjected to thematic analysis. Transcripts were coded manually to identify recurring themes and insights related to students' learning experiences, benefits, and concerns regarding ChatGPT. This qualitative component served to contextualize and enrich the quantitative findings.

Ethical Considerations

This study adhered to ethical standards for research involving human participants. Prior to data collection, informed consent was obtained from all respondents. Anonymity and confidentiality were ensured throughout the study, and participation was strictly voluntary. Pilot respondents were told their data would only be used for instrument validation and not in the final analysis.

Results and Discussion

A total of 318 respondents participated in the survey, providing valuable insights into demographic profiles, academic disciplines, and patterns of ChatGPT usage.

As illustrated in Figure 1, the gender distribution was skewed slightly toward female respondents (56.9%) compared to male respondents (43.1%). While this reflects a higher level of female engagement in the study, it also raises the possibility of gender-based differences in the use of AI tools, which may influence the interpretation of other results.

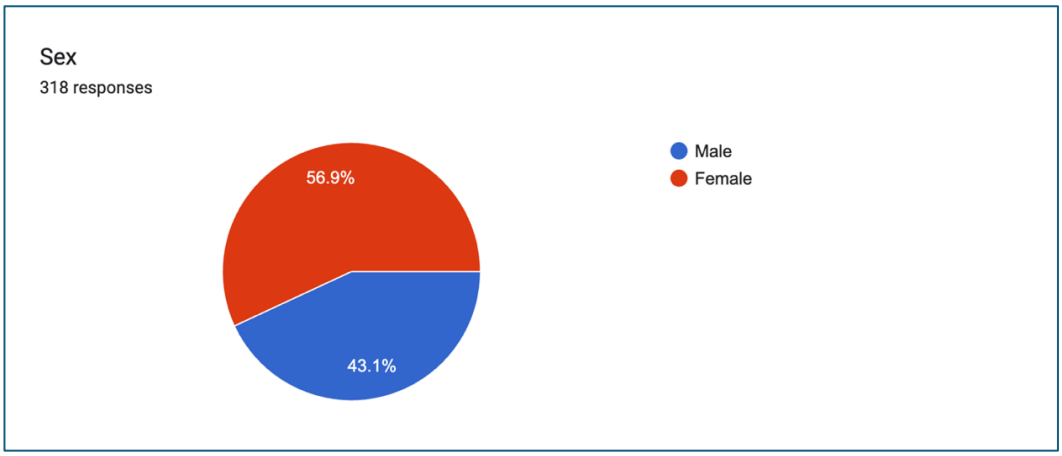

Figure 1. Sex Distribution of Respondents

In terms of academic discipline (Figure 2), Information Technology Education represented the largest share of respondents (36.2%), followed by education (21.4%), Engineering and Architecture (15.4%), Health Allied (12.3%), Business and Management (10.7%), Industrial Technology (1.6%), and Other disciplines (2.5%). This broad participation suggests that ChatGPT is being adopted across diverse fields. However, the dominance of IT students might skew results toward more favorable views of AI tools, as these users are typically more exposed to or comfortable with technology.

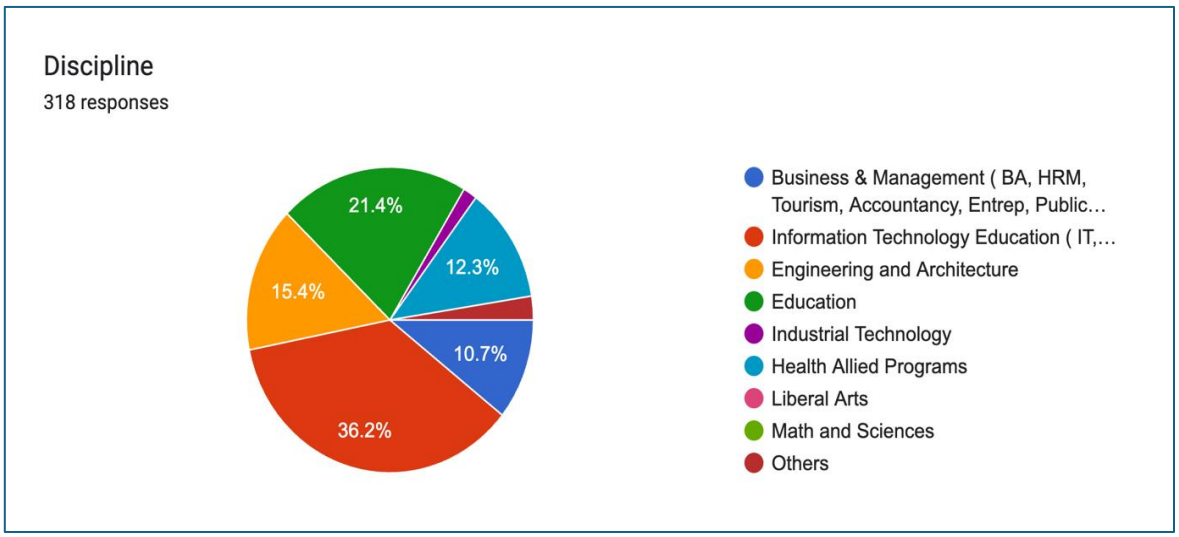

Figure 2. Academic Discipline Distribution of Respondents

Regarding school classification (Figure 3), State Universities and Colleges comprised the largest portion (48.59%), followed by Local Colleges (31.71%) and Private Institutions (19.7%). This imbalance may reflect broader enrollment patterns, but it is also possible that students in public institutions are more actively exploring or

experimenting with free or accessible technologies like ChatGPT due to resource constraints.

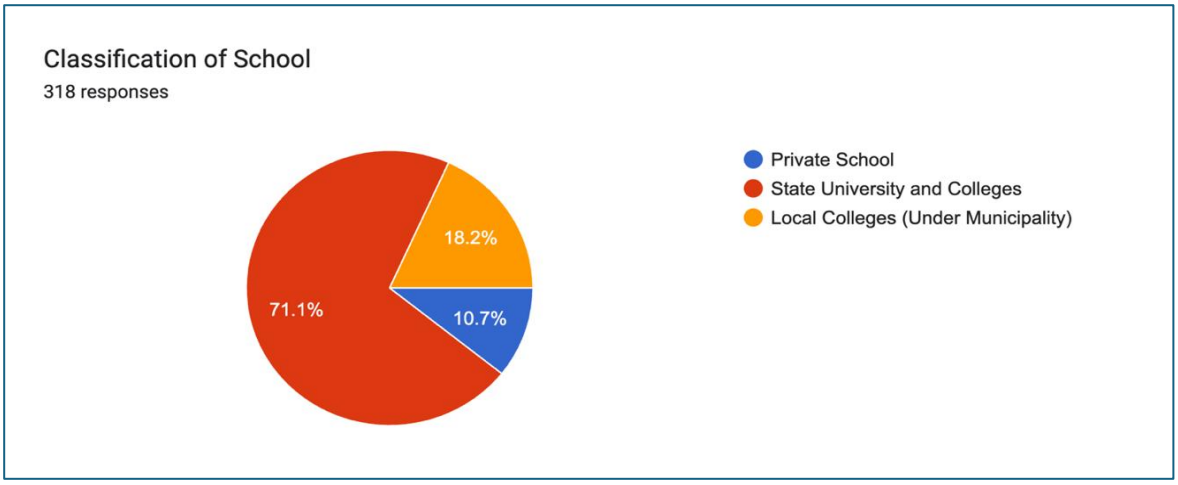

Figure 3. Classification of Respondents' Schools

As shown in Figure 4, 51.6% of respondents reported using ChatGPT regularly for studying, while 21.4% used it occasionally, 18.2% usually, 4.4% seldom, and 4.4% have never used the tool. This widespread use highlights the increasing reliance on AI-assisted learning. However, it is important to critically consider potential downsides, such as over-dependence on AI-generated content, reduced critical thinking, or academic dishonesty. Furthermore, the relatively high proportion of regular users may indicate both the benefits (e.g., accessibility and efficiency) and challenges (e.g., lack of proper guidance or ethical considerations) associated with such tools.

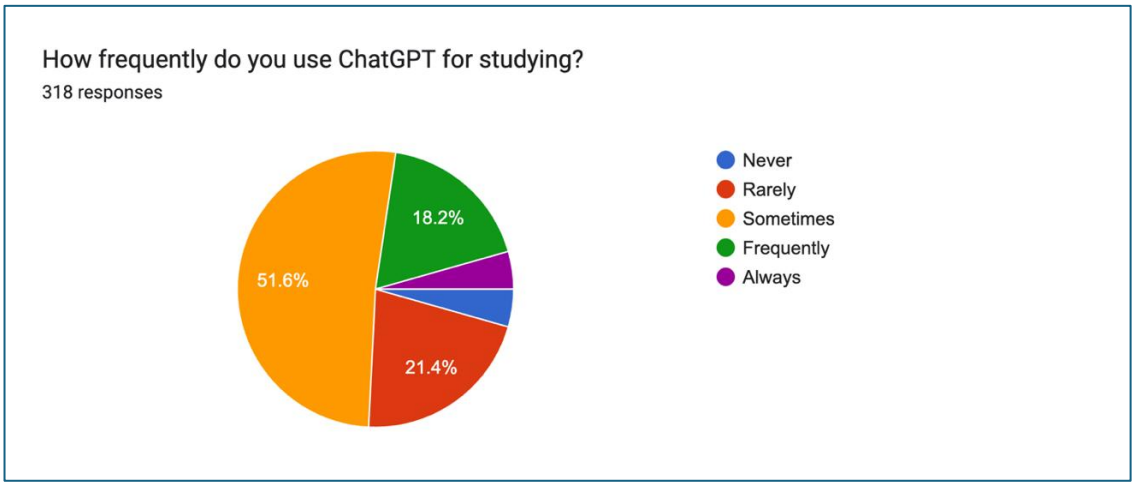

Figure 4. Frequency of ChatGPT Use for Studying

ChatGPT's conversational interface increases user engagement by emulating natural discussions. Halaweh (2023) describes how ChatGPT's interactive discourse features encourage active involvement and long-term engagement in educational activities. ChatGPT promotes a conversational learning environment, encouraging students to ask questions, seek clarification, and participate in discussions, thereby improving their learning experience.

Figure 5 illustrates respondents' perceptions of ChatGPT's most useful features. The data shows that the most popular feature, chosen by more than half of the participants (52.2%), is ChatGPT's ability to give explanations, followed by answering questions (27.4%), making summaries (8.8%), generating text (8.2%), and other features (3.5%).

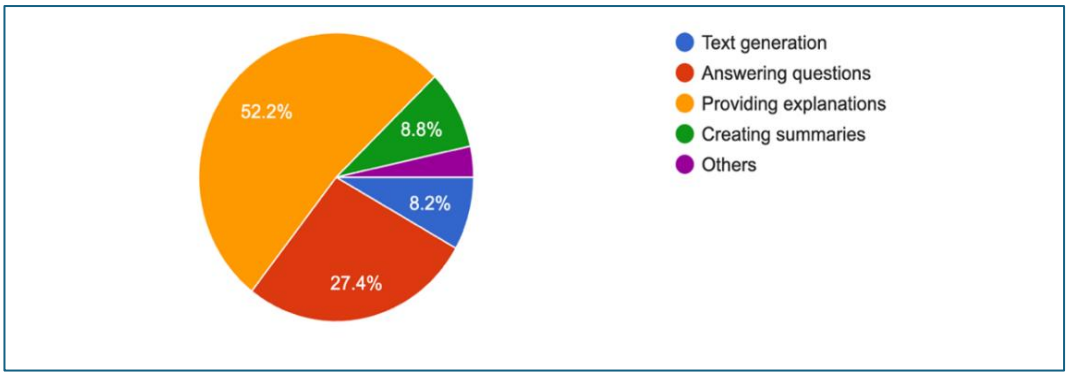

Figure 5. Respondents' perception on ChatGPT's most useful features

The dominant preference for explanatory responses suggests that students value ChatGPT primarily as a cognitive support tool, capable of demystifying complex academic content. This function fits with Vygotsky's (1978) sociocultural theory of scaffolded learning, which says that learners improve when they get help that connects what they already know to what they can learn next. ChatGPT, acting as a form of "cognitive scaffolding," allows learners to receive immediate, on-demand explanations that promote deeper comprehension—especially when instructors are not immediately available.

Moreover, the high percentage attributed to answering questions highlights ChatGPT's role in enabling self-directed inquiry. When viewed through the lens of constructivist learning theory, this use represents an important shift from teacher-dependent instruction to student-driven exploration. In this capacity, ChatGPT empowers learners to actively engage in knowledge construction by posing questions and refining their understanding based on dynamic AI feedback.

While less frequently cited, the remaining categories, creating summaries, generating text, and other functions, still illustrate the platform's versatility. These features reflect ChatGPT's potential to enhance productivity, particularly in information synthesis and content generation tasks. Such capabilities are particularly useful in research-heavy or writing-intensive disciplines, where managing large volumes of information is essential.

Finally, the findings indicate that students primarily value ChatGPT for its explanatory clarity and responsive support, both of which contribute to enhanced engagement and learning efficacy. Yet, to maximize its educational potential, institutions must approach AI integration with strategic oversight, promoting digital literacy and critical thinking alongside technological adoption.

Figure 6 presents the top three purposes for which respondents reported using ChatGPT: (1) to obtain general information or guidance on various topics, (2) to assist with homework and academic assignments, and (3) to support personal learning. These findings offer insight into how students integrate AI tools into their academic routines and self-directed learning strategies.

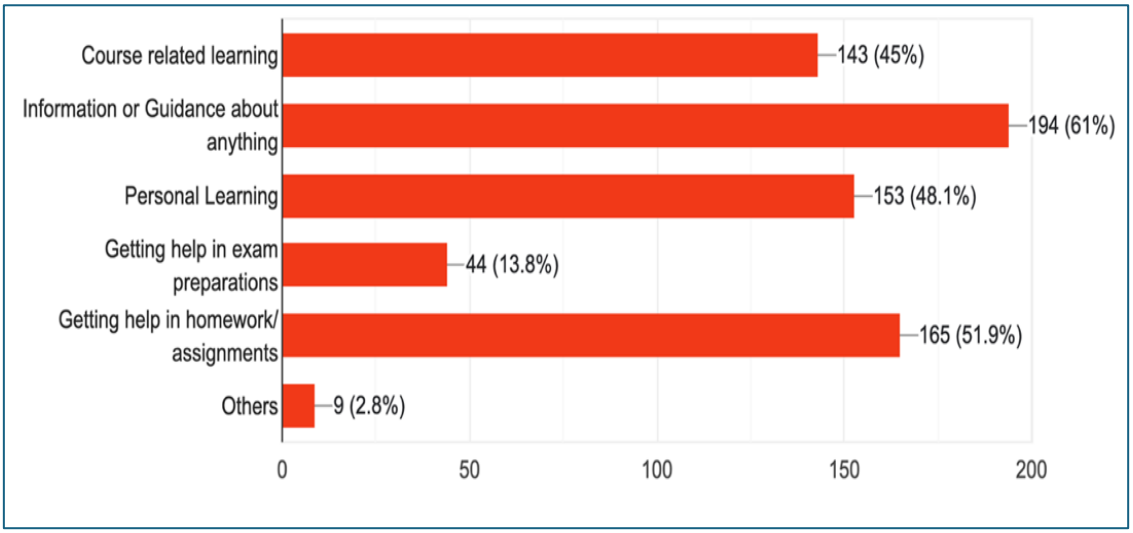

Figure 6. Reasons in using ChatGPT

The predominant use of ChatGPT for information seeking and academic support reflects students' inclination to leverage AI for immediate and context-relevant assistance. This aligns with the findings of Mai et al. (2023), who emphasized that GPT-based tools provide not only fast access to knowledge but also personalized feedback mechanisms that help shape students' cognitive and affective learning experiences. From a theoretical standpoint, these uses correspond with constructivist learning theories, which posit that learners build new knowledge through active

engagement and meaningful interaction with content. ChatGPT's natural language interface supports this interaction by adapting explanations based on user queries, thereby reinforcing personalized knowledge construction.

The second most common use—assisting with homework and assignments—raises critical pedagogical considerations. While such usage can enhance efficiency and reduce cognitive load, it may also pose risks if students become overly dependent on AI-generated content without fully understanding the underlying concepts. The third major purpose, personal learning, underscores the growing role of ChatGPT as a self-directed learning companion. Smith et al. (2023) note that ChatGPT fosters individualized instructional environments by offering real-time explanations, feedback, and support tailored to each learner's pace and style.

Moreover, the platform's role in collaborative learning contexts should not be overlooked. Wang et al. (2024) showed that using AI in group learning, like with ChatGPT, resulted in better grades, less mental effort, and more confidence in students—important elements for doing well in school. This study suggests that ChatGPT's value is not limited to individual learning tasks but extends to socially constructed learning experiences that mirror real-world collaboration.

However, while these findings are promising, it is important to consider them with a balanced perspective. The frequency of ChatGPT use does not necessarily equate to educational effectiveness. Without structured guidance, students may misuse the tool or internalize surface-level knowledge. Additionally, there remain concerns about academic integrity, skill erosion, and the potential oversimplification of complex subject matter.

Finally, the diverse reasons for using ChatGPT reflected in Figure 2 affirm the tool's versatility and broad appeal among students. Grounded in constructivist and self-determination theories, ChatGPT offers multiple affordances for personalized, autonomous, and collaborative learning. However, to harness its full educational potential, institutions must adopt thoughtful integration strategies, ensuring that students are technologically equipped and pedagogically guided in their use of AI-powered tools.

Table 1 summarizes some major findings about the influence of ChatGPT on students. First, most respondents (4.08%) agreed that ChatGPT might help them understand difficult topics, demonstrating its potential as a learning aid. Furthermore, respondents reported higher confidence in their studies (3.84) and increased engagement in learning activities after using ChatGPT (3.48), indicating that it benefits student motivation and involvement. Furthermore, respondents reported that ChatGPT made learning more pleasurable (3.89) and increased their efficiency in

completing assignments (4.20), showing its practical utility. Furthermore, respondents reported improved critical thinking (3.39) and writing skills (3.73), as well as a renewed enthusiasm in learning (3.71), which they attributed to their contact with ChatGPT. Furthermore, respondents highly agreed that ChatGPT is a time-saving tool (4.21) for their academic work, emphasizing its practical value. The fact that respondents gave ChatGPT an overall rating of 3.83 for being an effective platform for raising their academic performance suggests that it could be a helpful tool in educational settings.

Table 1. Impact of using ChatGPT

		SD	*WM*	*Verbal Interpretation*
1	Do you find ChatGPT helpful in understanding difficult concepts?	0.78	4.08	Agree
2	Do you feel more confident in your studies when using ChatGPT?	0.91	3.84	Agree
3	Do you feel more engaged in learning when using ChatGPT?	0.91	3.48	Agree
4	Do you think ChatGPT has made studying more enjoyable for you?	0.84	3.89	Agree
5	Has ChatGPT helped you in completing assignments more efficiently?	0.77	4.30	Strongly Agree
6	Do you think ChatGPT has improved your critical thinking skills?	0.99	3.39	Agree
7	Do you think ChatGPT has improved your writing skills?	1.16	3.73	Agree
8	Do you think that using ChatGPT tool, will increase your interest in learning?	1.10	3.71	Agree
9	Do you think that ChatGPT is a time-saving tool for your academic tasks?	0.85	4.21	Strongly Agree
10	Do you think ChatGPT is a good AI platform for improving your overall academic performance?	1.05	3.83	Agree
	Average Weighted Mean		3.85	Agree

On the other hand, efficiency in assignment completion received the highest weighted mean among the 10 measured indicators, while strengthening critical thinking skills ranked lowest. The overall weighted mean across all questions is 3.85, indicating that respondents generally perceive ChatGPT as beneficial to several academic areas.

Garcia and Martinez (2021) looked at AI-based educational platforms and found that using ChatGPT improved students' writing skills, critical thinking, and overall academic success, which backs up the idea that ChatGPT helps in many areas

of learning. These findings back up the current study's result—based on an average score of 3.85—showing that ChatGPT improves students' academic experiences in areas like understanding concepts, confidence, engagement, writing, critical thinking, and working together.

In Table 2, the negative t-statistic (-4.38) indicates that male students had a significantly higher mean impact score (3.63) than female students (3.27). The p-value, which is less than 0.001, confirms that this difference is statistically significant at the 0.05 level. The result suggests that the influence of ChatGPT varies notably between male and female students. According to the independent samples t-test, male students report a higher mean impact score compared to their female counterparts.

Table 2. Comparisons between the impact of ChatGPT on students across Sex

2.a. Independent Samples T-Test						
			Statistic	df	p	
L	Student's t		-4.38	346	<.001	
2.b. Group Descriptives						
	Group	N	Mean	Median	SD	SE
L	Female	192	3.27	3.40	0.763	0.0551
	Male	156	3.63	3.60	0.755	0.0605

These results align with prior research exploring gender differences in how students use educational technologies. For instance, Fadillah and Akbar (2025) found that male students reported a significantly greater perceived impact from ChatGPT compared to female students. Similarly, Møgelvang et al. (2024) demonstrated that male higher-education students engaged more frequently and broadly with generative AI chatbots, whereas female students exhibited more cautious, text-focused, and critically reflective usage patterns.

These findings suggest that ChatGPT may cater more effectively to male students' learning styles or technological preferences, which warrants further exploration into how AI tools are designed and how they interact with different student groups.

However, it is crucial to consider that the higher mean score among male students does not necessarily mean that female students are less engaged or benefiting from ChatGPT. Rather, this result may reflect a gender-based difference in how students perceive and engage with the tool. Further research could explore whether these differences are due to social, cultural, or educational factors or stem from inherent differences in learning approaches. The findings also prompt the need

for targeted pedagogical interventions that address these differences and ensure that both male and female students benefit equally from AI-powered educational tools.

Future studies should explore the reasons behind these gender-based variations and examine the effectiveness of personalized learning pathways that can address the diverse needs of male and female students. Such research could help optimize the use of AI in education, making it more inclusive and responsive to the needs of all students.

Table 3 presents the results of a one-way ANOVA (Welch's) test examining the impact of ChatGPT usage on students across different types of educational institutions. The analysis shows a significant difference in the average effects of ChatGPT among different types of schools ($p = 0.044$), meaning that how students feel about ChatGPT differs notably between state universities, local colleges run by the city, and private schools.

Table 3. The impact of using ChatGPT on students across educational institutions

3.a. One-Way ANOVA (Welch's)

	F	df1	Df2	p
L	3.23	2	94.2	0.044

3.b. Group Descriptives

	A	N	Mean	SD	SE
L	State Universities and Colleges	295	3.46	0.753	0.0439
	Local Colleges (Under Municipality)	59	3.20	0.809	0.1053
	Private School	54	3.29	0.874	0.1189

A closer look at the information in Table 3.b shows that students at state universities and colleges have the highest average effect score ($M = 3.46$, $SD = 0.753$), indicating they view ChatGPT's impact more positively. Next are students in private schools ($M = 3.29$, $SD = 0.874$), while those in local colleges have the lowest average score ($M = 3.20$, $SD = 0.809$). Although these differences might seem small, the statistical significance indicates that we can reject the null hypothesis and confirm that the type of school influences how students feel about AI tools like ChatGPT.

From a critical standpoint, the findings point to institutional variation as a possible mediating factor in the educational efficacy of AI applications. This can be understood through the framework of sociocultural theory (Vygotsky, 1978), which emphasizes the influence of learning environments, available resources, and institutional support structures on cognitive development. State universities and

colleges often have greater access to digital infrastructure, faculty development initiatives, and technology integration programs, which may facilitate more meaningful and pedagogically aligned use of ChatGPT. In contrast, local colleges under municipal governance may face resource limitations or policy constraints that inhibit optimal AI use, thus contributing to a less impactful experience for their students.

Moreover, these findings also warrant reflection through the lens of digital equity and access theory. The discrepancies across institutional types suggest that not all students benefit equally from technological innovations, even when tools like ChatGPT are universally accessible. Institutional preparedness, faculty training, and curriculum alignment with AI integration are likely critical moderators of ChatGPT's perceived impact.

However, it is essential to interpret these differences with nuance. While state university and college students exhibit the highest average impact score, this does not necessarily imply superior learning outcomes. It's also important to look at factors like how involved students are, the type of tasks that use AI, and the teaching methods used with ChatGPT, as these all need more detailed study. Additionally, standard deviations within each group indicate considerable variability, suggesting that individual experiences with ChatGPT are heterogeneous even within the same institutional setting.

The findings point out the value of context-sensitive AI implementation in education. The important differences shown by Welch's ANOVA highlight the need for customized plans when using AI tools in different educational settings. Instead of implementing a universal strategy, policymakers and educators should consider each institution's distinct technological, cultural, and pedagogical contexts to optimize the educational benefits of tools such as ChatGPT.

Figure 7 reveals a complex landscape of concerns expressed by respondents regarding the educational use of ChatGPT. While the tool is widely utilized across various academic tasks, a significant number of participants articulated critical apprehensions about its broader pedagogical implications. Chief among these is the issue of over-reliance on AI for learning, which many fear may erode students' intellectual independence and self-directed learning capacities. Zhai and Wibowo (2024) warn that relying on AI dialogue systems could hinder the growth of important thinking skills, a worry shared by participants in this study who wondered if always having AI help might reduce their ability to think for themselves and solve problems on their own.

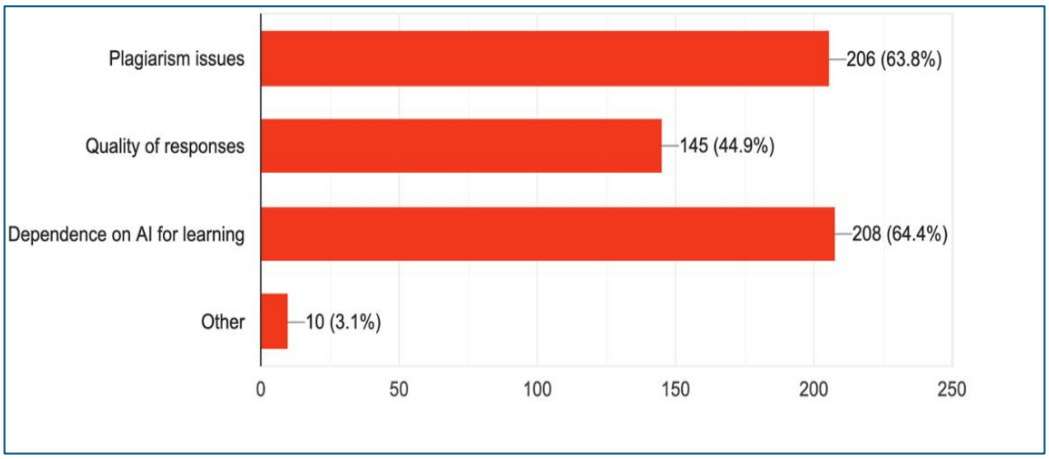

Figure 7. Concerns of students using ChatGPT for educational purposes

Another pressing issue raised is the potential for plagiarism and the ethical misuse of AI-generated content. Garcia et al. (2025) report that students fear the normalization of AI-authored submissions without proper citation could compromise academic integrity. This aligns with broader concerns in the literature about authorship, originality, and the blurred boundaries between assistance and substitution. From a critical literacy perspective, it is not merely a technical matter but a socio-ethical dilemma that calls for a renewed emphasis on digital ethics and academic honesty within AI-augmented learning environments.

The concern regarding ChatGPT's responses' quality, accuracy, and contextual relevance is equally noteworthy, particularly in complex or specialized disciplines. As Garcia et al. (2025) highlight, there remains a justifiable skepticism about the AI's ability to provide nuanced, discipline-specific information. This challenge underscores the limitations of large language models, which, while statistically powerful, may lack the epistemic grounding and domain-specific rigor expected in formal education. Beyond these substantive concerns, respondents identified practical limitations, including difficulties with interface usability, insufficient language adaptability, and limited cultural sensitivity.

In synthesis, while the survey findings highlight several descriptive concerns, a critical analysis reveals deeper tensions between the promise of AI and the pedagogical realities of higher education. These tensions underscore the need for a more deliberate and theory-informed integration of tools like ChatGPT—one that balances technological utility with the preservation of human-centered learning values. Ultimately, addressing these challenges requires a collaborative effort among educators, developers, and policymakers to ensure that AI-enhanced learning environments are not only efficient but also ethical, inclusive, and intellectually empowering.

Figure 8 illustrates a range of student-suggested improvements to enhance ChatGPT's utility as an educational support tool. Notably, the most prominent recommendation centers on improving the accuracy of the AI's responses, reflecting a broader concern about the reliability of AI-generated information. This concern may be interpreted through the lens of Cognitive Load Theory, where inaccurate or inconsistent feedback from ChatGPT potentially increases extraneous cognitive load, thereby hindering effective learning. The emphasis on accuracy suggests that while students appreciate ChatGPT's capabilities, they remain critically aware of its current limitations in content precision, especially in complex or discipline-specific contexts.

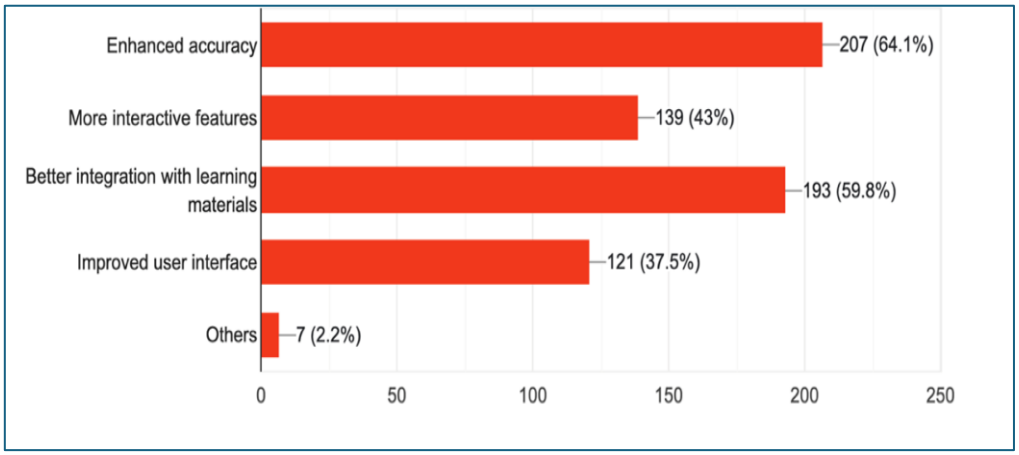

Figure 8. Suggestions of the Respondents to Increase Educational Support of ChatGPT

The second most cited suggestion involves better alignment of ChatGPT with learning materials, including textbooks, syllabi, and curriculum standards. This recommendation underscores a desire for contextual relevance and pedagogical congruence. From a constructivist perspective, learning is most effective when new information is meaningfully connected to prior knowledge. Respondents appear to advocate for AI tools that generate content and integrate seamlessly into their structured academic pathways, supporting deeper conceptual understanding.

A strong emphasis is placed on the need for more interactive features, including adaptive questioning, personalized feedback, and scenario-based simulations. These suggestions show a move from just looking up information to engaging in active, interactive learning, which fits with Vygotsky's idea that learning is something people do together. Respondents are not merely passive consumers of AI-generated content—they envision a tool that co-constructs knowledge with them.

Finally, several respondents proposed other enhancements, such as culturally responsive outputs, improved user interface, and better language localization. While less frequently mentioned, these reflect nuanced concerns about accessibility,

inclusivity, and usability—important factors for ensuring equitable access to AI tools across diverse learner populations. A deeper examination reveals that students critically engage with the technology, even though the data initially presents as a descriptive list of user recommendations. Their suggestions move beyond surface-level convenience and toward pedagogical integrity, cognitive alignment, and learner empowerment. These findings invite educators, developers, and policymakers to consider a more responsive, evidence-based approach to deploying and refining AI tools like ChatGPT in educational contexts.

Conclusions

The results of this study offer compelling evidence that ChatGPT is significantly reshaping students' educational experiences across various academic disciplines and institutional types. With the majority of respondents reporting frequent use of the tool—particularly for explanations, answering questions, and academic support—it is evident that ChatGPT has emerged as a versatile and accessible learning aid. This aligns with constructivist and sociocultural theories emphasizing learner engagement, scaffolding, and contextualized knowledge-building.

The findings suggest that students primarily value ChatGPT for its capacity to simplify complex concepts, provide instant support, and enhance both the enjoyment and efficiency of studying. The highest-rated function—providing explanations—highlights the role of ChatGPT as a cognitive scaffold that fills instructional gaps and promotes deeper comprehension, especially when instructor presence is limited. Moreover, the platform's impact on motivation, assignment completion, writing ability, and engagement further underscores its broad educational relevance.

Gender-based and institutional differences uncovered through inferential statistics reveal that ChatGPT does not impact all students uniformly. Male students reported significantly higher mean effect scores than females, a result that mirrors earlier studies indicating gender-based preferences and patterns in technology use. Likewise, students from state universities and colleges reported a more substantial perceived benefit from ChatGPT than those from local and private institutions—likely due to variations in access, support structures, and digital readiness. These disparities highlight the importance of equity-oriented AI integration, grounded in digital inclusion principles and pedagogical responsiveness.

At the same time, the research outlines key challenges and limitations. Worries about depending too much on AI, maintaining academic honesty, getting accurate responses, and ensuring AI is useful for teaching show that we urgently need to use AI carefully, thoughtfully, and ethically in education. These concerns go beyond mere technical aspects, as they fundamentally impact the essence of learning and intellectual growth in the digital era.

Respondents also offered thoughtful recommendations for improving ChatGPT's educational functionality—including better alignment with curricula, more interactive features, and enhanced cultural sensitivity. These insights reflect students' capacity to engage critically with educational technology and envision AI not simply as a tool for consumption but as a collaborative partner in learning.

This study affirms ChatGPT's transformative potential in academic contexts while also cautioning against uncritical adoption. For educators, administrators, and developers, the challenge lies not in resisting AI's entry into the classroom but in ensuring that its use is pedagogically sound, ethically guided, and equitably accessible. With appropriate oversight, training, and contextual adaptation, ChatGPT can serve as an assistant to students and as a catalyst for deeper, more reflective, and more personalized learning.

Acknowledgment

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