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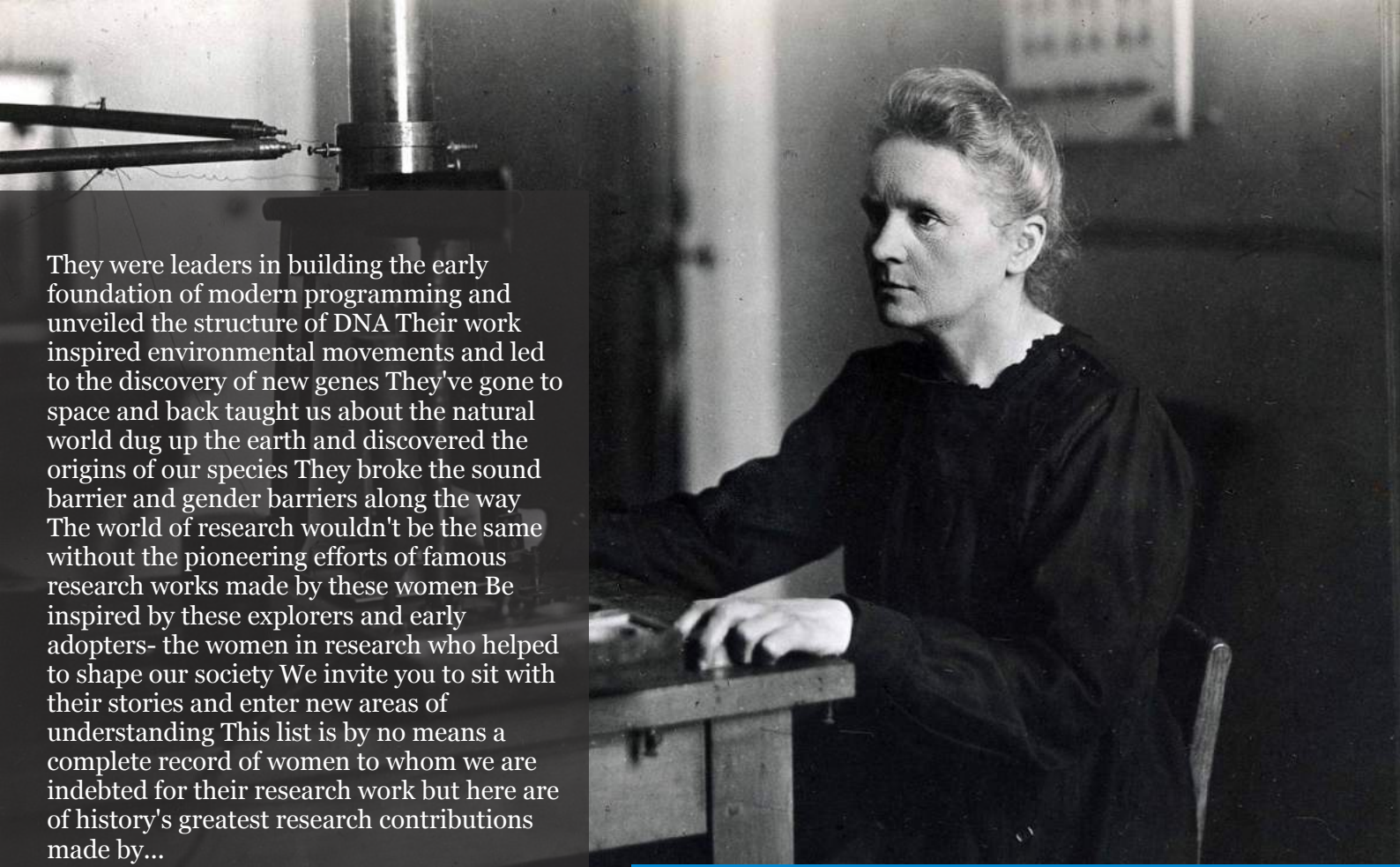
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Journal Content

In this Issue



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- i. Journal introduction and copyrights
 - ii. Featured blogs and online content
 - iii. Journal content
 - iv. Editorial Board Members
-

1. Organizational Triads. **1-12**
 2. Why Astrophysicist Herbert Dingle Rejected Relativity. **13-16**
 3. John Rawls' Justice as Fairness as a Common Good Principle: Critiques and Justification. **17-24**
 4. Public Debt and Economic Development: Evidence from Nigeria. **25-41**
 5. Some Important Clarifications about Misiam and Deontology. **43-48**
 6. The Original Meanings of the Social Sciences as a Foundation for Illustrating a Renewed Reflection on their Current Situation and Future Challenges. **49-60**
 7. Situated Feminisms, Art and New Technologies: A Study of the Aesthetic Technological Experiences of the Women's Movement in Argentina (2013-2017). **61-66**
 8. Language Acquisition, as a Predictor of School Learning and Inclusion Variable. **67-72**
 9. Counterterrorism without Borders U. S. – Uzbekistan Cooperation in the Global Security Framework. **73-77**
-

- V. Great Britain Journals Press Membership

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Organizational Triads

Dr. Polyakov Oleg

State University of Aerospace Instrumentation

ABSTRACT

The article examines the behavioral aspects of the triad model of social organization. In addition to the pressure relationship in the behavior of triads, the support relationship is highlighted, which specifies some features of relations in society. A new concept of organizational triad is introduced, which better reflects real interactions in society. For this triad, the laws of its behavior are considered, which are formulated in the theorem on fixed points of the triad and the theorem on the convergence of the triad to fixed points. Some issues of triad decomposition are also considered. In conclusion, general conclusions on the materials of the article are discussed.

Keywords: triad principle, organizational triad, decomposition of triads.

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Keywords: triad principle, organizational triad, decomposition of triads.

Author: State University of Aerospace Instrumentation.

АННОТАЦИЯ

В статье рассматриваются поведенческие аспекты триадной модели организации общества. Кроме отношения давления в поведении триад выделено отношение поддержки, которое уточняет некоторые особенности отношений в обществе. Вводится новое понятие организационной триады, которое лучше отражает реальные взаимодействия в обществе. Для этой триады рассматриваются законы ее поведения, которые сформулированы в теореме о неподвижных точках триады и теореме о сходимости триады к неподвижным точкам. Рассматриваются также некоторые вопросы декомпозиции триад. В заключении обсуждаются общие выводы по материалам статьи.

Ключевые слова: триадный принцип, организационная триада, декомпозиция триад.

I. ВВЕДЕНИЕ

Триадный принцип устройства общества уже достаточно хорошо известен. Всестороннему его рассмотрению, например, посвящена работа [1]. В [2] исследуется этот принцип применительно к формированию структуры общества. Там показано, что триадный принцип обеспечивает устойчивость функционирования общества и своим источником имеет новый взгляд на понятие капитала, который определяется как та или иная разновидность распределительного права - права на преимущественный доступ к распределяемому. Там же показано, что распределение в обществе организуется взаимодействием двух прав: распределительного права и права на отложенный обмен, из которых распределительное право является главным.

Распределительное право является главным, потому что за ним всегда стоит возможность принудить к его исполнению. Другими словами, за распределительным правом всегда стоит право на насилие. В [2] рассмотрены варианты меток, которыми могут обладать носители распределительного права, например, это может быть должность, количество денег или общественное признание. В соответствии с этим люди, которые получают преимущественное распределение через деньги, получили название дельцов, люди, получающие преимущественное распределение через должность (или титул), получили название воинов, а люди, получающие преимущественное распределение через признание, получили название жрецов. Это условные названия для различных ролевых функций людей в обществе. Дельцы занимаются взаимодействием с материальным миром и формируют экономику в обществе. Воины занимаются взаимодействиями между

людьми и формируют политику. Наконец, люди, которые занимаются взаимодействием с миром идей (моделями мира в разных областях), формируют идеологию. В зависимости от того, какой из этих трех категорий принадлежит право на насилие, формируется тот или иной тип общества. Эти общества были условно названы Республикой дельцов (деньги), Королевством воинов (должность) и Империей жрецов (признание).

Итак, на самом верхнем уровне общества формируется некая триада взаимодействующих групп, которая рассматривается в [1,2,3]. Кроме того, каждый их элементов триады сам может представлять собой триаду. Например, в [4] рассматривается триада промышленности, которая является элементом триады экономики. Другими словами, структура общества представляет собой систему вложенных триад, которые взаимодействуют друг с другом по иерархической вертикали и представляют собой фрактал общества.

В настоящей работе внимание сосредоточено на исследовании свойств отдельной триады и фрактала триад.

II. СИСТЕМЫ С ОБРАТНОЙ СВЯЗЬЮ

В [1] описаны системы с обратной связью, в которых элементы соединены последовательно друг с другом в замкнутый круг. Каждый элемент обладает некоторым ресурсом, который мы обозначим символами A , B , C и т.д. При этом каждый элемент оказывает давление на последующий элемент. Это означает, что, если A и B два следующих

друг за другом элемента, то возрастание A вызовет уменьшение B и, наоборот, уменьшение (ослабление) A вызовет увеличение B .

Понятно, что в таких системах при четном числе элементов наблюдается положительная обратная связь. Например, при четырех элементах A , B , C , D увеличение A вызовет уменьшение B , что в свою очередь вызовет возрастание C , за которым последует уменьшение D , что в свою очередь приведет к еще большему возрастанию A . Такие системы называют системами с положительной обратной связью и они являются неустойчивыми.

С другой стороны, при нечетном числе элементов наблюдается отрицательная обратная связь. Например, в триаде A , B , C увеличение A вызовет уменьшение B , что в свою очередь вызовет возрастание C , которое приведет к компенсации первоначального возрастания A . Системы с нечетным числом элементов являются устойчивыми к дестабилизирующим воздействиям. Триада является самой короткой кольцевой структурой с нечетным числом элементов, поэтому дестабилизирующие воздействия распространяются в ней быстрее, чем в других нечетных структурах, так что и компенсационные процессы в ней происходят быстрее. Таким образом, триада является самой быстрой устойчивой структурой подобного типа. Как показано в [2], распределительное право порождает триаду с отрицательной обратной связью, которая лежит в основе общественного устройства.

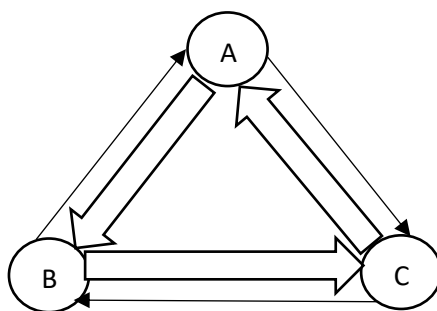


Рис. 1: Мультипликативная триада

На рис.1 изображена мультипликативная триада. Здесь A , B и C представляют собой элементы триады и одновременно величины некоторого ресурса, управляющего давлением, а широкими стрелками показана связь в форме давления одного элемента на другой. В [1] предложена формализация давления в виде обратных соотношений:

$$A=a/C, B=b/A, C=c/B, \text{ где } a, b, c - \text{ константы.}$$

Указанные соотношения передают лишь идею работы триады, но вряд ли могут рассматриваться как математические соотношения, реально работающие в триаде.

Очевидно, для указанных условий выполняется соотношение $(ABC)^2=abc=const$. Другими словами, мультипликативная триада не порождает и не теряет энергию давления. Такое мультипликативное представление триады имеет некоторые проблемы при исследовании динамики ее работы, поскольку требует решения системы дифференциальных уравнений Лотки-Вольтерры [5], адаптированный к триаде в [6]. К тому же, с одной стороны, обратно пропорциональная зависимость не является единственной и обязательной для функционирования триады, а с другой, общественно-экономические системы, моделью которых являются триады, функционируют как правило в форме дискретных систем. Кроме того, внимание только к отношению давления оставляет за бортом вопрос: что является источником роста ресурса в вершине триады, когда давление на нее уменьшается? Таким образом, имеет смысл более глубоко исследовать идею триадного принципа применительно к дискретному варианту и выяснить источник роста ресурса. Для пояснения этих вопросов рассмотрим известную китайскую систему из пяти элементов Усин (Wuxing), представленную на рис.2а.

На этом рисунке символом A обозначено дерево, B – огонь, C – земля, D – металл, E – вода. Тонкими стрелками на рисунке показано отношение порождения: дерево (A) порождает огонь (B) и так далее. Важной особенностью этой системы является также и то, что в ней

присутствует отношение сдерживания или давления. Это отношение действует через элемент: дерево (A) сдерживает землю (C), земля сдерживает воду (E) и так далее. Эти два отношения на пяти элементах имеют непересекающиеся пары элементов (непересекающиеся циклы) и очевидно связаны друг с другом. На рис. 2b изображена система Усин по контуру сдерживания, которая получается из системы по контуру порождения. Как видно из рисунков, отношения порождения и сдерживания взаимосвязаны и действуют через один элемент с единственной особенностью: если при переходе от порождения к сдерживанию направление сдерживания сохраняется, то при переходе от сдерживания к порождению направление порождения меняет направление на противоположное. Например, на рис.2а переход порождения $A \rightarrow B \rightarrow C$ соответствует переходу сдерживания $A \Rightarrow C$ той же направленности, в то время как переходу сдерживания на рис. 2b $A \Rightarrow C \Rightarrow E$ соответствует переход порождения $E \rightarrow A$ обратной направленности.

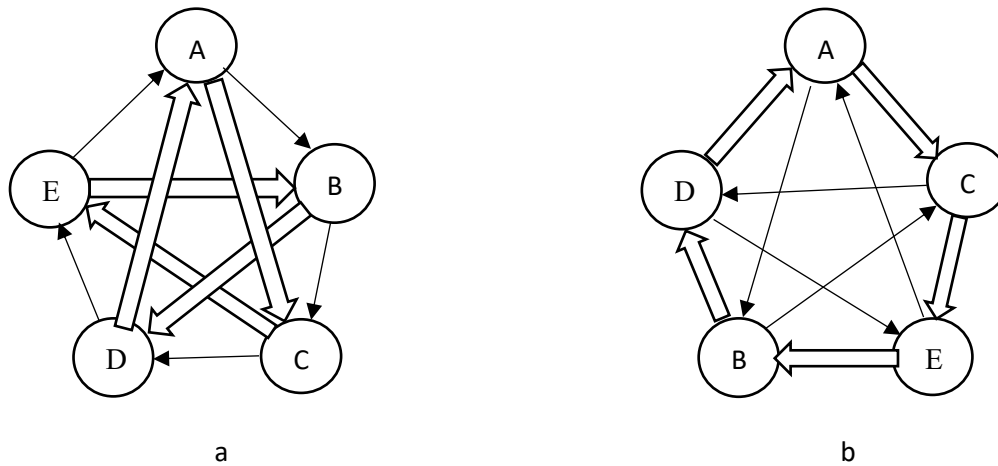


Рис. 2: Система Усин

Наличие отношения сдерживания (давления) в системе Усин означает присутствие в контуре отрицательной обратной связи, делающей эту систему устойчивой. Вместе с тем, в мультипликативной триаде отрицательная обратная связь задается простой обратно пропорциональной зависимостью величины ресурса одной вершины от ресурса предшествующей.

Подобно системе Усин в рассматриваемых триадах также можно выделить отношение порождения, возникающее через элемент. Например, для рис.1 A порождает C , поскольку давление A на B приводит к уменьшению возможности давления B на C , что способствует усилению C . На рис. 1 отношение порождения на триаде показано тонкими стрелками. Отношение порождения можно рассматривать как усиление элементом A элемента C за счет элемента B . Эта схема лежит в основе ресурсной (аддитивной) триады, описанной в [2]. Нетрудно показать, что мультипликативный и аддитивный подходы эквивалентны.

III. ОРГАНИЗАЦИОННЫЕ ТРИАДЫ

Формулы, которые описывают работу мультипликативной или аддитивной триады, весьма условны. Например, в общественной триаде под A можно понимать воинов, под B – жрецов, а под C – дельцов. Кстати, в этой разметке небольшое отличие от триады в [2], в которой еще не было выявлено и учтено отношение порождения (поддержки). Эта

небольшая путаница не влияет на обсуждение свойств триады в [2,3] и связана фактически со смешением отмеченных двух отношений между элементами.

Итак, рассмотрим, например, давление воинов на жрецов. Что это означает? Как это измерить? Что вообще имеется в виду конкретно? Или рассмотрим, например, формулу $B=b/A$. Что означает величина B у жрецов и величина A у воинов? Как эта величина A реально может влиять на B ? Как определить эти величины? Почему именно такая формула? Ведь формул давления может быть множество и для непрерывного и для дискретного случаев. И почему столь неопределенные понятия должны создавать отрицательную обратную связь, которая будет реально действовать? Кроме того, в разных триадах природа давления может быть различной, так что их согласование особенно при вложенных триадах может порождать проблемы. Все эти вопросы абсолютно справедливы и требуют ответа. В этом разделе мы попробуем хотя бы частично разобраться с этими вопросами.

Давайте, выберем первую попавшуюся связь, например, давление A на B . A обозначает воинов. Воины – это просто тип людей, занимающихся регулированием отношений между людьми, то есть властью. Для решения этих задач воины группируются в различные управляющие организации в виде партий, министерств, комитетов, администраций, армейских подразделений, полиции и т.д.

Итак, под A мы будем понимать множество организаций воинов, которые занимаются управлением людьми. Аналогично под B мы будем понимать множество организаций жрецов: религиозные организации, организации в области науки и искусства и т.д. У каждой организации $a \in A$ есть область компетенции, то есть перечень тех организаций $b \in B$ на которые распространяются решения a . Решения одних организаций из A обязывают к определенным действиям и ограничениям организации из B . Итак, мы определили бинарное отношение $S_{AB} \subseteq A \times B$ между элементами множеств A и B следующим образом: $(a, b) \in S_{AB}$, если a может давать распоряжения для b . Аналогично можно определить отношения S_{BC} , S_{CA} . Назовем такие триады организационными.

Очевидно, на множествах организаций как A , так и B , существует некоторая иерархия, которая выглядит, как некоторый частичный порядок на A и B . Задавая S_{AB} , мы можем учесть его, воспользовавшись следующим правилом: если $(a, b) \in S_{AB}$ и $b' \leq b$, то $(a, b') \in S_{AB}$. Пока мы не будем учитывать важность тех или иных решений, степень загруженности организаций из B , получивших предписания от организаций из A и другие возможные особенности системы управления.

Обозначим через a^\uparrow множество всех b таких, что $(a, b) \in S_{AB}$, а через b^\downarrow множество всех a таких, что $(a, b) \in S_{AB}$. Распространим операции \uparrow и \downarrow на подмножества элементов из A и B соответственно: для $X \subseteq A$ обозначим через X^\uparrow объединение всех множеств a^\uparrow ($a \in X$), а для $Y \subseteq B$ обозначим через Y^\downarrow объединение всех множеств b^\downarrow ($b \in Y$). Итак, мы определили два отображения \uparrow и \downarrow подмножеств A на подмножества B и подмножеств B на подмножества A . Смысл этой конструкции заключается в следующем: если в некоторый момент времени группа X организаций из A формирует управляющие указания и задействует на их исполнение предприятия из B , то X^\uparrow будет обозначать все возможно задействованные организации из B . Аналогично, Y^\downarrow обозначает все возможные организации из A , которые могут

задействовать организации из Y . Таким образом, мы рассматриваем давление, как способность давать указания и требовать их исполнения. Такое давление отнимает ресурс управления у организаций, на которые давят, поскольку они вынуждены его тратить на реализацию полученных указаний. Понятно, что это некоторая идеализация реальной ситуации, но мы пока ограничимся такой формой давления.

Итак, если X – множество источников воздействий, то те организации из B , которые будут свободны от этих воздействий и сохранят свой управленческий ресурс нетронутым составят дополнение множества X^\uparrow . С учетом построения X^\uparrow это множество совпадает с пересечением всех дополнений a^\uparrow . Для удобства мы заменим бинарное отношение S_{AB} на его дополнение R_{AB} : $(a, b) \in R_{AB}$ тогда и только тогда, когда $(a, b) \notin S_{AB}$. Аналогично, для R_{AB} определим операции Δ и ∇ : X^Δ равно пересечению всех a^Δ ($a \in X$) и Y^∇ равно пересечению всех b^∇ ($b \in Y$). Чтобы полностью определить отображения Δ и ∇ на булеанах A и B положим $\emptyset^\Delta = B$ и $\emptyset^\nabla = A$. Итак, по построению, если X – множество организаций из A , оказывающих давление, то X^Δ – множество организаций из B , на которые это давление не распространяется. Аналогично, если Y – множество организаций из B , то Y^∇ – множество организаций из A , которые в данный момент не оказывают давление на организации Y . Заметим, что переход от отношений S к отношениям R носит чисто технический характер: так удобнее проводить дальнейшие выкладки. Это напоминает топологические исследования: иногда их удобно проводить в терминах открытых множеств, а иногда – замкнутых.

В математике отображения, подобные Δ и ∇ , называются связями Галуа [7]. Ниже приведены некоторые свойства этого соответствия без доказательств, которые при желании можно найти в [7].

1. Если $X_1 \subseteq X_2$ ($Y_1 \subseteq Y_2$), то $X_2^\Delta \subseteq X_1^\Delta$ ($Y_2^\nabla \subseteq Y_1^\nabla$).
2. Если $X_1 \subseteq X_2$ ($Y_1 \subseteq Y_2$), то $X_1^{\Delta\nabla} \subseteq X_2^{\Delta\nabla}$ ($Y_1^{\nabla\Delta} \subseteq Y_2^{\nabla\Delta}$).

3. Для любого X (Y) верно $X \subseteq X^{\Delta \nabla}$ ($Y \subseteq Y^{\nabla \Delta}$).
4. Для любых X_1, X_2 (Y_1, Y_2) верно $(X_1 \cup X_2)^{\Delta} = X_1^{\Delta} \cap X_2^{\Delta}$ ($(Y_1 \cup Y_2)^{\nabla} = Y_1^{\nabla} \cap Y_2^{\nabla}$).
5. $X^{\Delta \nabla} = X^{\Delta \nabla \Delta \nabla}$ ($Y^{\nabla \Delta} = Y^{\nabla \Delta \nabla \Delta}$).

Свойства 2, 3 и 5 задают на A и B операторы замыкания $\Delta \nabla$ и $\nabla \Delta$ соответственно, так что $X^{\Delta \nabla}$ и $Y^{\nabla \Delta}$ оказываются замкнутыми множествами по этим операторам на A и B соответственно. В силу свойства идемпотентности 5 применение оператора замыкания к замкнутому множеству не изменяет его, так что замкнутые множества являются устойчивыми по отношению к соответствующим операторам замыкания.

$$6. X_1^{\Delta \nabla} \cap X_2^{\Delta \nabla} = (X_1^{\Delta \nabla} \cap X_2^{\Delta \nabla})^{\Delta \nabla}$$

$$Y_1^{\nabla \Delta} \cap Y_2^{\nabla \Delta} = (Y_1^{\nabla \Delta} \cap Y_2^{\nabla \Delta})^{\nabla \Delta}.$$

Из свойства 6 следует, что пересечение замкнутых множеств также является замкнутым множеством.

7. Замкнутые множества, полученные с помощью операторов $\Delta \nabla$ и ∇ ($\nabla \Delta$ и Δ) совпадают.

Свойство 7 означает, что все замкнутые множества на A могут быть получены либо применением оператора $\Delta \nabla$ к различным X , либо применением оператора ∇ к различным Y (аналогично для $\nabla \Delta$ и Δ). В дальнейшем все замкнутые множества на A , упорядоченные по включению, мы будем называть левой решеткой L_{Al} , а замкнутые множества на B - правой решеткой L_{Br} . Левая и правая решетки соединены прямым и обратным отображением Δ и ∇ , которые по смыслу соответствуют глаголу «не оказывать давление». Отображения Δ и ∇ для замкнутых множеств являются дуально изотонными отображениями, о чем свидетельствует следующее свойство.

$$8. \text{Включение } X_1^{\Delta} \subseteq X_2^{\Delta} \quad (Y_1^{\nabla} \subseteq Y_2^{\nabla})$$

выполняется тогда и только тогда, когда $X_2^{\Delta \nabla} \subseteq X_1^{\Delta \nabla}$ ($Y_2^{\nabla \Delta} \subseteq Y_1^{\nabla \Delta}$).

Другими словами, Δ и ∇ - это одно и то же отображение (прямое и обратное), переворачивающее пары по отношению включения. Решетки L_{Al} и L_{Br} являются

полными решетками по отношению включения, поскольку в них есть единицы (множества A и B соответственно) и для любого подмножества замкнутых множеств определен \inf (в соответствии со свойством 6 роль \inf выполняет пересечение замкнутых множеств) [8]. Таким образом, в указанных решетках выполняется также и операция сложения произвольной совокупности замкнутых множеств, которая дает \sup в полной решетке. Например, для двух множеств: $X_1 + X_2 = (X_1 \cup X_2)^{\Delta \nabla}$ и $Y_1 + Y_2 = (Y_1 \cup Y_2)^{\nabla \Delta}$.

9. Решетка L_{Al} по отображению Δ дуально изоморфна решетке L_{Br} в том смысле, что при изоморфизме отношение включения меняет направление, операция пересечения переходит в операцию сложения, а операция сложения переходит в операцию пересечения. Аналогичная формулировка для отображения ∇ .

Итак, три отношения в триаде R_{AB} , R_{BC} и R_{CA} порождают три соответствия Галуа в виде шести полных решеток замкнутых множеств, и трех прямых и трех обратных дуальных изоморфизмов. Каждый элемент триады содержит две полные решетки: элемент A содержит L_{Ar} и L_{Ab} , элемент B содержит L_{Br} и L_{Bl} и элемент C содержит L_{Cr} и L_{Cl} . В [7] показано, что такую пару решеток можно свести в одну, но мы не будем этого делать, чтобы сохранить ясность в описании схемы.

Итак, левые и правые решетки элементов триады связаны отображениями дуального изоморфизма. Но как влияют на общую связь в триаде отображения внутри элементов триады? Рассмотрим это на примере. Пусть, например, в L_{Al} выделен элемент X_A . Этот элемент является замкнутым множеством по оператору $\Delta \nabla_{AB}$. Этому элементу по отображению Δ_{AB} соответствует замкнутый элемент X_B решетки L_{Br} . Элемент X_B не обязательно является замкнутым в решетке L_{Bl} . Элементу X_B в решетке L_{Bl} соответствует ближайший замкнутый элемент $X'_B = X_B^{\Delta \nabla BC}$. В силу свойства 3 $X_B \subseteq X'_B$. Итак, если, например, $X_A^1 \subseteq X_A^2$ в L_{Al} , то в силу свойства 9 $(X_A^2)^{\Delta \nabla AB}$

$\subseteq (X_A^1)^{\Delta AB}$, и в силу свойства 2 $((X_A^2)^{\Delta AB})^{\Delta \nabla BC} \subseteq ((X_A^1)^{\Delta AB})^{\Delta \nabla BC}$. Таким образом, композиция отображений Δ_{AB} и $\Delta_{\nabla BC}$ является дуальным эпиморфизмом из L_{AI} на L_{BI} , который переворачивает образы по отношению включения. Обозначим этот дуальный эпиморфизм через ψ_{AB} . Аналогичные дуальные эпиморфизмы из L_{BI} на L_{CI} и из L_{CI} на L_{AI} обозначим через ψ_{BC} и ψ_{CA} соответственно.

Итак, отображение $\phi_A = \psi_{AB}\psi_{BC}\psi_{CA}$ отображает L_{AI} на себя, как и аналогичные отображения ϕ_B и ϕ_C . В силу дуальной изотонности каждой составляющей композиции отображений, отображения ϕ_A , ϕ_B и ϕ_C также дуально изотонны и являются дуальными эпиморфизмами, то есть для любых $X_1, X_2 \in A$ из $X_1 \subseteq X_2$ следует $\phi_A(X_2) \subseteq \phi_A(X_1)$. Аналогично для ϕ_B и ϕ_C . Отсюда непосредственно вытекает, что отображения $\phi_A\phi_A, \phi_B\phi_B, \phi_C\phi_C$ полных решеток L_{AI}, L_{BI}, L_{CI} на себя являются изотонными (эпиморфизмами). Каждое из таких отображений соответствует двойному проходу триады. В [9] можно найти доказательство так называемой теоремы о неподвижной точке. Суть ее состоит в следующем. Если ϕ – изотонное отображение полной решетки L в себя, то существует хотя бы один элемент $X \in L$ такой, что $\phi(X) = X$. Элементы полной решетки, обладающие этим свойством, называются неподвижными точками. Очевидно, в нашем случае роль ϕ для полных решеток L_{AI}, L_{BI}, L_{CI} выполняют отображения $\phi_A\phi_A, \phi_B\phi_B, \phi_C\phi_C$. Таким образом, в каждой из трех решеток существуют неподвижные точки относительно отображений на себя, получающихся при четном числе прохождений по триаде.

Пусть X_A – неподвижная точка в L_{AI} . Если $\phi_A(X_A) = X_A$, то X_A также является неподвижной точкой для дуально изотонного отображения ϕ_A . В этом случае независимо от числа оборотов триады её вершина A будет находиться в одном и том же состоянии X_A . В силу функционального характера связей триады неизменными будут также и состояния X_B, X_C вершин B и C соответственно. В силу неизменности X_B, X_C они также будут

неподвижными точками в полных решетках вершин B и C .

Пусть теперь $\phi_A(X_A) = X'_A$, причем $X_A \neq X'_A$. Поскольку $\phi_A\phi_A(X_A) = X_A$, то $\phi_A(X'_A) = X_A$ и $\phi_A\phi_A(X'_A) = X'_A$. Таким образом, X'_A также является неподвижной точкой. И опять в силу функциональности связей триады для вершин B и C имеем: $\phi_B(X_B) = X'_B, X_B \neq X'_B, \phi_B(X'_B) = X_B, \phi_B\phi_B(X'_B) = X'_B$ и $\phi_C(X_C) = X'_C, X_C \neq X'_C, \phi_C(X'_C) = X_C, \phi_C\phi_C(X'_C) = X'_C$. Итак, в этом случае триада находится как бы в автоколебательном движении, причем каждый элемент триады колеблется между двумя неподвижными точками. Фактически мы доказали следующую теорему.

Теорема 1. В организационной триаде каждая из вершин имеет одну или несколько неподвижных точек. Если какая-нибудь вершина попадает в неподвижную точку, все остальные вершины также оказываются в неподвижных точках. При этом возможны два варианта. Либо триада оказывается в стационарном режиме, когда состояния ее вершин не меняются со временем, либо все три вершины совершают автоколебательные движения между двумя своими неподвижными точками.

Следствие. Между множествами неподвижных точек в вершинах триады существует взаимно-однозначное соответствие (биекция) по отображениям ψ_{AB}, ψ_{BC} и ψ_{CA} .

Обозначим через α, β и γ соответственно множество неподвижных точек в вершинах A, B и C соответственно. Обозначим через ψ'_{AB} сужение ψ_{AB} на α . Пусть X_B является неподвижной точкой из β . Поскольку $\phi_B(X_B) = X_B$, то у X_B есть прообраз X_A по отображению ψ_{AB} , который в соответствии с теоремой 1 также является неподвижной точкой, так что $\psi'_{AB}(X_A) = X_B$ и ψ'_{AB} является отображением «на» или сюръекцией. Пусть теперь X_A и X'_A две неподвижные точки из α и $\psi'_{AB}(X_A) = \psi'_{AB}(X'_A) = X_B$. Это означает, что $\phi_A(X_A) = \phi_A(X'_A)$ и, следовательно, $X_A = \phi_A\phi_A(X_A) = \phi_A\phi_A(X'_A) = X'_A$. Таким образом, отображение ψ'_{AB} является взаимно-

однозначным соответствием (биекцией). Аналогичные доказательства для отображений ψ'_{BC} и ψ'_{CA} .

Итак, количество неподвижных точек в вершинах триады одинаково, а отображения ψ_{AB} , ψ_{BC} и ψ_{CA} на α , β и γ задают биекции этих множеств. Разумеется, отображения ψ_{AB} , ψ_{BC} и ψ_{CA} вне множеств неподвижных точек могут не являться биекциями.

Как выглядит функционирование триады в неподвижных точках с точки зрения интерпретаций в начале этого раздела? Легко видеть, что при стационарном варианте в каждой вершине триады стабилизируется перечень как организаций, дающих указания, так и перечень организаций, работающих по своему плану без текущих указаний. Фактически, в стационарном режиме организации, формирующие управляющие указания, делятся на две части: продолжающие управлять и находящиеся в резерве на случай выхода из стационарного режима. Аналогично, организации исполнители также делятся на две части: одна часть не получает указаний от организаций из A и работает по своему плану, а другая находится под давлением организаций из A . Если же в процессе работы триада переходит в автоколебательный режим на неподвижных точках, то это выглядит как циклическая смена двух стационарных режимов в силу некоторого «перерегулирования» в одном или обоих режимах.

Разумеется, теорема 1 важна, но недостаточна, чтобы ответить на вопросы об устойчивости организационной триады. Важнейшим вопросом остается вопрос о том, всегда ли организационная триада дрейфует к неподвижным точкам независимо от вида полных решеток в её вершинах?

Понятно, что любые организационные триады, которые имеет смысл рассматривать, конечны, хотя бы потому, что количество организаций во всех вершинах триады конечно. Другими словами, мы имеем дело с конечными полными решетками. Итак, пусть L – конечная полная решетка, являющаяся

цепью, и ϕ – изотонное отображение L в себя. Выберем произвольный элемент $X_0 \in L$. Для элемента X_0 , если L – цепь, возможны три случая: $\phi(X_0) = X_0$ (и тогда X_0 – неподвижная точка), $\phi(X_0) < X_0$ и $\phi(X_0) > X_0$. Пусть, например, $\phi(X_0) < X_0$, тогда в силу изотонности $\phi(\phi(X_0)) \leq \phi(X_0)$. Если $\phi(\phi(X_0)) = \phi(X_0)$, то $X_1 = \phi(X_0)$ является неподвижной точкой. Если же $\phi(X_1) < X_1$, то можно снова применить отображение ϕ к $X_2 = \phi(X_1)$. Поскольку L – конечная полная решетка, то либо для некоторого n будет выполняться $X_n = \phi(X_n)$ и нисходящая цепь остановится на некоторой неподвижной точке X_n , либо эта цепь для некоторого m остановится на наименьшем элементе X_m решетки L . Поскольку X_m – наименьший элемент решетки, то $X_m = \phi(X_m)$ и X_m является неподвижной точкой. Итак, любая нисходящая по ϕ цепь в конечной полной структуре L завершается неподвижным элементом. Разумеется, если все нисходящие цепи завершаются неподвижными точками, не достигая наименьшего элемента, то наименьший элемент не обязательно должен быть неподвижной точкой. Но, если хотя бы одна нисходящая цепь достигает наименьшего элемента, то он оказывается неподвижной точкой. Аналогично рассматривается случай, когда $\phi(X_0) > X_0$. Итак, имея в виду результаты теоремы 1, мы доказали следующую теорему.

Теорема 2. В каком бы состоянии $\langle X_A, X_B, X_C \rangle$ не находилась организационная триада с полными решетками в виде цепей, её свободный дрейф по соответствующим отображениям приводит к состоянию, в котором каждая вершина триады оказывается в неподвижной точке.

При этом под свободным дрейфом понимается следующая последовательность реализации отображений триады. Если, например, триада находится в состоянии $\langle X_A, X_B, X_C \rangle$, где $X_A \in L_{Ab}$, $X_B \in L_{Bb}$, $X_C \in L_{Cb}$, то на первом такте срабатывания триады элементы X_A, X_B, X_C операторами замыкания пространств L_{Ar} , L_{Br} , L_{Cr} одновременно переводятся в замкнутые множества X'_A, X'_B, X'_C пространств L_{Ar} , L_{Br} , L_{Cr} соответственно. На следующем такте

указанные множества отображениями Δ_{AB} , Δ_{BC} и Δ_{CA} одновременно переводятся в новое состояние $\langle Y_A, Y_B, Y_C \rangle$, и так далее. Понятно, что, хотя для удобства обозначений мы рассматривали в доказательствах только триады, теоремы 1 и 2 остаются справедливыми для любых циклов с нечетным числом вершин.

Мы рассмотрели поведение изолированной триады. Реальные триады получают возмущающие воздействия (изменение состояний вершин триады) от внешних событий, от вложенных и охватывающих триад. Это требует разработки механизма определения состояния вершин триады. Если состояние вершины оценивается некоторой числовой величиной, как на рис. 1, то необходимо научиться измерять эту величину. С другой стороны, для организационных триад необходимо контролировать, в каком замкнутом множестве находятся полные решетки в вершинах триады. В [7] эти вопросы рассматриваются в терминах теории распознавания образов. В частности, там вводится понятие признака и исследуются вопросы разложения решеток в решетки признаков. Это позволяет определить число признаков для идентификации замкнутых множеств, количество значений каждого признака, и соответствие между замкнутыми множествами и кортежами значений признаков, что позволяет построить алгоритмы идентификации замкнутых множеств решеток в вершинах организационных триад.

IV. ФРАКТАЛЫ УПРАВЛЕНИЯ

Устойчивость работы триады зависит не только от ее собственных свойств. Если система устроена так, что каждый элемент триады сам является триадой, то такое взаимодействие с вложенной триадой также вызывает дестабилизирующее действие на поведение триады. Поясним это тезис на примере. Для триад, состояние вершин которых характеризуется числовой величиной, иерархические построения могут носить различный характер. Это связано со способом

передачи влияния по иерархии сверху вниз и, наоборот. Для примера, на рис.3 представлена двухуровневая иерархическая триадная структура с жесткой вертикалью управления.

Изображенную здесь двухуровневую структуру мы называем структурой с жесткой вертикалью управления, поскольку в каждой триаде второго уровня выделена главная вершина, через которую осуществляется обмен ресурсом этой триады с триадой первого уровня. Это обеспечивается тем, что главная вершина триады второго уровня одновременно является вершиной триады первого уровня. В такой схеме важными характеристиками являются очередность срабатывания триад и правило использования общего ресурса, находящегося в общей вершине. Если сначала срабатывает главная триада, перераспределяя ресурс между своими вершинами, а только потом триады второго уровня, перераспределяя доступный им ресурс триады первого уровня через свои главные вершины триад второго уровня, то мы получаем жесткую структуру подчинения: триада первого уровня может пользоваться всеми ресурсами в своих вершинах независимо от состояния триад нижнего уровня, в то время как триады второго уровня могут, например, использовать только какую-то часть ресурса из своей главной вершины. Зависимость, определяющая величину этой части, составляет исходную характеристику иерархической триады. Понятно, что, подключив к каждой вершине на рис.3 новую триаду, мы получим трехуровневую триадную структуру и так далее. Всё это очень напоминает формирование фракталов, поэтому мы назвали такие структуры фрактальными.

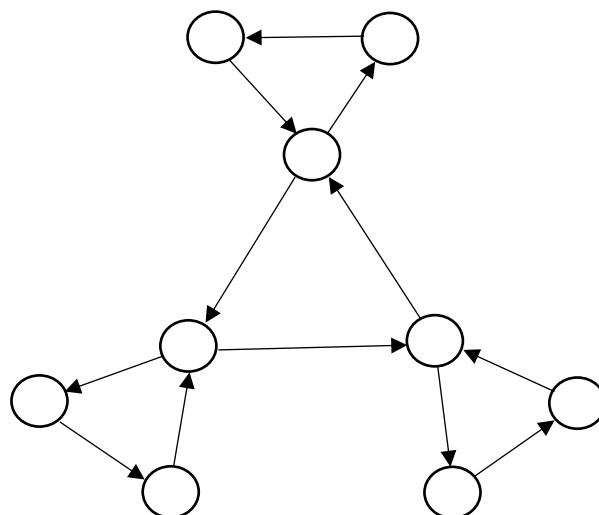


Рис.3: Двухуровневая триадная структура

С организационными триадами ситуация выглядит несколько сложнее. В отличие от изолированной триады, в иерархических организационных триадах есть влияние верхних и нижних триад, а также необходимость управления нижними триадами. Для рассмотрения организационных триад вернемся к уже затронутому выше вопросу об иерархии организаций. Для удобства можно считать (хотя это не принципиально), что иерархия организаций представлена в виде дерева: в корне находится главенствующая организация, а каждый ярус дерева отражает соответствующий уровень в иерархии. В целом иерархическая структура общества содержит несколько деревьев, то есть является лесом. Деревья в лесу связаны между собой через управляющие каналы, которые и моделируются триадами. Если, например, отсечь вершины деревьев на уровне некоторого ранга, который у разных деревьев может отличаться, то корни деревьев с прилегающими к ним вершинами более высокого ранга, чем линия отсечения, составят первый уровень управления (организационной структуры). Эти маленькие деревья, состоящие из отсеченных верхушек, составят верхнюю триаду организационной структуры.

Суть триадной гипотезы состоит в том, что эти верхушки можно разбить на три непересекающихся класса, причем управляющие каналы (давление) в абсолютном большинстве случаев будут идти от одного класса к другому, образуя триаду.

Оставшиеся после усеечения поддерева (каждого дерева в отдельности), находящиеся ниже линии отсечения оказываются также разделены на три класса. И опять тернарная гипотеза утверждает, что в каждом из этих трех классов поддерева можно разбить на три непересекающихся класса так, что в абсолютном большинстве случаев управляющие каналы будут идти от одного класса к другому, образуя триаду давления. Этот процесс усеечения можно продолжать, пока мы не дойдем до нижних триад.

Из описанного процесса следует, что триадная декомпозиция просто упрощает процесс управления в обществе, разбивая его управленческую структуру на устойчивые, обозримые к пониманию и управлению части. Возможно, для изучения системы управления обществом можно было бы ограничиться одной большой изолированной триадой, поведение которой вероятно не будет существенно отличаться от варианта с

декомпозицией. Впрочем, это еще требует обоснования.

V. ЗАКЛЮЧЕНИЕ

Итак, мы рассмотрели некоторые поведенческие вопросы триадной модели. Одним из важных выводов является существование в любой триаде с давлением некоторого отношения порождения или поддержки. Исходя из приведенных рассуждений, отношение поддержки можно определить следующим образом: если А давит на В, а В давит на С, то это означает, что А поддерживает С за счет В. Эта два отношения, явно сформулированные в Усин, присутствуют не только в поведении обычной числовой триады, но и в поведении организационной триады.

Теорема о неподвижных точках гарантирует, что даже при наличии сложных взаимодействий внутри триады, система всегда имеет хотя бы одну устойчивую конфигурацию (состояние). Это объясняет, почему социальные структуры способны сохранять стабильность даже в условиях изменений и внешних потрясений. Когда организационная триада достигает неподвижной точки в какой-либо своей вершине, все ее вершины также оказываются в своих неподвижных точках. Это важная часть теоремы констатирует факт синхронизации неподвижных точек для разных вершин триады. В этом синхронизированном состоянии организационная триада находится либо в стационарном, либо в автоколебательном режиме. Кроме того, оказывается, что число неподвижных точек в триадах одинаково и они взаимно-однозначно связаны между собой.

Стационарные режимы. Если система приходит к состоянию, которое не меняется при дальнейших взаимодействиях между элементами триады, это означает, что достигнута устойчивая конфигурация (состояние). В социальном контексте это соответствует устойчивому распределению ролей и функций между группами, когда ни

одна из них не способна изменить общий баланс без внешних воздействий.

Автоколебательные режимы. Возможна ситуация, когда система циклически переходит между двумя устойчивыми состояниями (двумя неподвижными точками в каждой вершине триады). Это отражает динамическое равновесие, когда структура сохраняет свою целостность, несмотря на внутренние изменения.

Если на триаду не оказывается дестабилизирующее воздействие извне, каждый элемент триады является цепью, триада в силу теоремы 2 всегда дрейфует к одному из своих устойчивых состояний, которое представляет из себя тройку неподвижных точек вершин триады. Описанные результаты справедливы для любых циклических конструкций с нечетным числом элементов и отношением давления одного элемента на последующий. Из описания организационной триады видно, что сама эта конструкция носит достаточно общий характер. В качестве начальных отношений между элементами можно выбрать и другие смысловые взаимодействия, которые бы отвечали идее некоторого давления.

В завершении, на понятийном уровне мы обсудили некоторые аспекты декомпозиции триадных моделей с тем, чтобы наметить дальнейшие направления исследований. Такие структуры по своему виду имеют фрактальную организацию, которая обеспечивает управляющую связь между иерархическими уровнями.

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Why Astrophysicist Herbert Dingle Rejected Relativity

Dr. Pierre Sabatier

ABSTRACT

Referring to the example of the famous twin paradox, astrophysicist Herbert Dingle argued that Special Relativity is false: two clocks, he said, cannot run slow relatively to each other. His argument implied that the two clocks and their readings were real, in accordance with naive realism. It will be shown that they are not real but part of the observers' subjective perception of reality - in which case, nothing prevents them from being different. Thus, it is naive realism which is wrong, not Relativity.

Keywords: special relativity, naive realism, perception, reality, twin paradox.

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I. INTRODUCTION

Most physicists consider philosophy a confused, approximate, needlessly complex discourse, in any case alien to scientific rigour - "a marshy territory, full of bogs and often invaded by the Germans" as it was described (*) on which they venture most unwillingly. When they have to, they go the shortest way: common sense philosophy, i.e. naive realism - of which scientific realism is a some more elaborated variant (Miller, 2004, Liston). They regard this view as the simplest and the most rational, the one with which everybody intuitively agrees because of its obviousness. So that most authors don't even care to formulate it explicitly and generally take it as implicit.

This vague and tacit consensus is nonetheless a philosophical option. But an option which is difficult to question as far as it is not expressly designated as such - making the debate more blurred.

The controversy started around the middle of the XXth century by astrophysicist Herbert Dingle

against the majority of the scientific community about Special Relativity is an example of such confusion (Dingle, 1972, Sochi, 2016). Under the appearance of a scientific debate, it was in fact a philosophical debate about reality. If both sides could not agree, it was paradoxically because they shared the same naive realistic worldview.

We'll come back to it later. First let us consider the issues at stake.

II. REALITY AND PERCEPTION

Naive realism has several variants, which can be summed up to two basic assumptions:

- There exists an all-encompassing observer-independent reality.
- This reality is "what is perceived or perceivable", as Bergson put it (Bergson, 1968).

In short, if I perceive something, it is because this something exists out there, independently of me - because it is real. Therefore, what I perceive is real.

So far, so good. But only until the act of perception is committed. Because it changes the nature of the perceived object.

The act of perception is an act of *interiorizing* the outer world by the observer: in committing it, he symbolically appropriates the outer world by reconstructing it abstractly in his consciousness on the basis of the stimuli he receives from it. In the course of an extremely complex coding process, he separates it from its physicality and transforms it into a non-physical replica of itself, an abstract representation which he interiorizes.

The purpose of this symbolical appropriation of the world is biological in the first place: it is the

way in which the observer manages to know his surroundings in order to use their resources for the production of his own existence (Akins, 1996, Heyer, 2002, Bruce and Green, 1985).

To correctly fulfill its function, perception must then be as reliable as possible - within the scope of the perceiving subject's needs and capabilities. There is no universal perception, that could take in all the aspects of the part of reality the subject interacts with. Each species obeys its own requirements and develops its own perceptive strategy with regard to the ecological niche in which it has settled. The criterion of reliability of this strategy is the efficiency of the empirical actions it permits. The fact that the living species succeeded in surviving in more or less harsh surroundings during millions of years shows how reliable their perception has proven to be.

But it is nevertheless limited, so that the information it produces, if reliable, gives only a partial and more or less approximate view of its object. The more so that within one given species, each individual makes his own choices and has his own priorities. More than a neutral and passive reproduction of reality, it is a subjective and active interpretation of it. So that there are not two identical perceptions of the same object or event.

This being said, though perception is subjective in the last resort, every member of the human species has the same perceptive system - then roughly the same perceptions, so that they confirm each other, inducing to think that they are objective. Thus, having access to reality through their perception and considering it highly reliable, human beings logically conclude that what they perceive and what is are one and the same thing.

Yet, for all the previously cited reasons, they are not. All the more so for example because the act of perception is always posterior to the event or object that is perceived: on the one hand because the stimulus travels a more or less long time before reaching the observer (sometimes thousands of years in the case of a remote star). On the other hand because after receiving the

stimulus the optical apparatus needs some time to construct a visual image (Turner, 2007). So that perception is always late relatively to reality: we perceive not what is but what was - and is no more.

Besides, in the case of visual perception, what we see is not the object itself but the flow of photons bouncing off it, so that they reveal it and hide it at the same time. And anyway, what reaches our senses is something else than what we think it is.

And lastly, are perceived only the aspects of reality which are accessible to the observer's sensory apparatus - the observables - which are only part of what exists, so that reality cannot be reduced to what is perceived or perceivable.

In short, contrary to what is assumed by the scientists's implicit naive realism, what is perceived is not reality as it is in itself, it is reality as it is in its physical interaction with the observer, it is reality filtered and reconstructed by the observer's sensory system: reality as it appears to him, not as it is.

This means that if we take the information given by perception as real and objective, we may come to wrong conclusions - that no mathematical formalization, as elaborate as it may be, will be able to correct. We will then run into unexpected contradictions - which we'll politely call paradoxes.

III. DINGLE AGAINST RELATIVITY

Now let us go back to Herbert Dingle and the twin paradox, which he used to demonstrate his critic of Relativity (Dingle, 1972).

This paradox is well known: a pair of twins are living side by side on Earth, then one of them flies away on a longspatial trip at a speed close to the speed of light. The twin who remains at home then notices that the traveller's time elapses less quickly than his own: when he is back on Earth, his twin has become younger than he (Langevin, 1923).

But, observes Dingle, this effect is reciprocal: for the traveller, the one moving is his brother, so

that he is the one who becomes younger. In other words, each twin becomes younger than the other, each clock runs slower than the other, which is impossible. At the risk of shocking the scientific establishment Dingle concluded that Special Relativity was false.

His opponents tried their best to prove him mistaken. But it does not seem that they succeeded in a convincing way. After several attempts, Popper himself eventually failed to disprove Dingle's argument and renounced to publish the article he had written (Hayes, 2010).

From the point of view of naive realism, Dingle was undoubtedly right: two clocks cannot run slow relatively to each other. At least if they are both real, as assumed by naive realism.

It does not seem that both sides have considered that they might not be. Naive realism does not permit such an hypothesis. And, for the reasons that were exposed at the beginning of this article, there is no questioning naive realism.

But if we consider real only that which exists independently of the observers, it is clear that the slowing down of time does not belong to this category. Each twin perceives the other's time as slowed down, says Relativity : the slowing down of his brother's time is what he *perceives*, not what *exists* independently of him. And what he perceives depends on him and his relation with what surrounds him. If this slowing down of time were an objective, real, observer-independent phenomenon, each of them would observe not only his brother's time being slowed down, but also his own, his proper time. But this is not what takes place - reality is not self-contradictory.

What is perceived by each twin, i.e. the slowing down of his brother's time, is then only the subjective way in which he perceives reality, the interpretation he gives of it in his own, separate, reference frame. And then nothing prevents two observers in two different reference frames to have two different perceptions of reality, to perceive the other's time as slower than his own. It is the opposite that would be weird.

Conversely, if what is perceived were objective reality, the situation would be more alarming : it would mean that we have here two objective realities and not one. More generally, it would mean that there are as many objective realities as there are observers- i.e. that there is no objective reality at all, that what is is just what is perceived, in accordance with George Berkeley famous formula "Esse est percipi aut percipere" - that we are in a solipsistic world, not a realistic one (Berkeley, 1713).

IV. CONCLUSION

With his example of the twin paradox, Dingle wrongly accuses Relativity : it is not Relativity which is at fault, it is its interpretation by naive realism, with which it has been associated. This in turn means that Relativity and naive realism are not compatible, that the latter does not permit to interpret correctly Relativity, that Relativity demands a more elaborate realism. But a realism which requires us to admit the inadmissible : to admit that, contrary to what is quasi-unanimously believed all around the world, what I perceive, what is out here, in front of me, this tree, this cloud, this streetlamp, this fishmonger, are not Reality, independent, objective, etc, but only My reality, my own subjective - or intersubjective - representation of reality.

The alternative is to dismiss Relativity, as did Herbert Dingle.

(*) *I apologize to the author of this superb definition: in spite of doing my best, I could not recall his name.*

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John Rawls' Justice as Fairness as a Common Good Principle: Critiques and Justification

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ABSTRACT

John Rawls' concept of justice as fairness as a common good principle is founded on two arguments. The first argument concerns the critiques that were brought forth concerning Rawls' conception of justice. They were done by philosophers who either supported or objected to Rawls' concept of justice as fairness, put differently, the critiques are either positive or negative. However, the bottom line is that they are both critical and constructive at the same time. Their critiques were basically directed to Rawls' thought and position on Social Contract Theory, original position, the veil of ignorance, reflective equilibrium, priority of rights and liberties, two principles of justice, Rawls' concepts on society, persons, social cooperation, social institutions and basic structure, primary goods just to mention a few. Some of the critiques were responded to by Rawls himself. The second argument concerns a justification as to why Rawls' concept of justice as fairness is a common good principle. This is done firstly, by the author after considering the philosophers' critiques and secondly through a philosophical analysis that encompasses constructive elements of Rawls' conception of justice. The goal of this justification is to present Rawls' sense of inclusivity, objectivity, commitment, mutual responsibility and cooperation as elements that are needed to foster and uphold the common good principle.

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John Rawls' concept of justice as fairness as a common good principle is founded on two arguments. The first argument concerns the critiques that were brought forth concerning Rawls' conception of justice. They were done by philosophers who either supported or objected to Rawls' concept of justice as fairness, put differently, the critiques are either positive or negative. However, the bottom line is that they are both critical and constructive at the same time. Their critiques were basically directed to Rawls' thought and position on Social Contract Theory, original position, the veil of ignorance, reflective equilibrium, priority of rights and liberties, two principles of justice, Rawls' concepts on society, persons, social cooperation, social institutions and basic structure, primary goods just to mention a few. Some of the critiques were responded to by Rawls himself. The second argument concerns a justification as to why Rawls' concept of justice as fairness is a common good principle. This is done firstly, by the author after considering the philosophers' critiques and secondly through a philosophical analysis that encompasses constructive elements of Rawls' conception of justice. The goal of this justification is to present Rawls' sense of inclusivity, objectivity, commitment, mutual responsibility and cooperation as elements that are needed to foster and uphold the common good principle.

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I. INTRODUCTION

The desired outcome of this article is to present a discussion that is geared towards making

a justification that demonstrates the reason as to why Rawls' concept of justice as fairness is a common good principle. The philosophical critiques on Rawls' concept of justice as fairness are utilized as the solid foundations for this discussion together with the focus on how Rawls managed to respond to them. It is only after engaging into this pursuit that the author will give his justification. This article concentrates therefore, on the critiques that were done by philosophers who are deemed important and relevant according to the author. These include; Alasdair MacIntyre, Paul Wolff, Michael Walzer, Ronald Dworkin, Amartya Sen, Robert Nozick and Michael Sandel. Immediately following their critiques, the author will give a justification that validates Rawls' concept of justice as fairness as an essential element to the common good principle.

1.1 Alasdair MacIntyre's Critiques on Rawls' Concept of Justice

Alasdair MacIntyre is in agreement with Rawls that the equality principle with regard to human needs is the foundation of his own concept of justice as fairness. In accordance with Rawls' second principle of justice, MacIntyre endorses Rawls' consideration of his notion of the least advantaged, something MacIntyre refers to as "the worst off sector of the community," that takes into account individuals who are least fortunate in terms of money, income and other goods.¹ Consequently, MacIntyre is in favor with the idea that "Rawls allows that common sense views of justice connect it with desert, but argues first that we do not know what anyone deserves until we have already formulated the rules of justice... and secondly that when we have formulated the rules of justice it turns out that it is not desert that is in

¹ Alasdair MacIntyre, *After Virtue 2nd ed.*, London: Gerald Duckworth & Co. Ltd, 1985, 248.

question anyway.”² MacIntyre’s critique is something appraisable and adds value to Rawls’ ideas of justice and the common good.

1.2 Paul Wolff and Michael Walzer’s Critiques on Rawls’ Concept of Justice

In his criticism of Rawls’ concept of justice as fairness, Paul Wolff reveals that Rawls’ concept of justice as fairness is asocial in nature because it completely disregards the interests of individuals.

Wolff employs the following as the foundation for his argument:

The heart of Rawls’ philosophy is the idea of the bargaining game, by means of which the sterility of Kant’s formal reason was to be overcome, and a principle was to be established that would combine strength and avoid the weakness of utilitarianism and intuitionism. The idea is original, powerful, and elegant, but it simply does not stand up. The original sketch of the bargain game was comprehensible, but it was open to crushing objections. The device of the veil of ignorance enables Rawls at least initially to avoid the pitfalls of the first model while seeming to link his philosophy to Kant.³

Michael Walzer is convinced that matters of justice are not about abstract and external principles just like Rawls purports. It is a matter of seeking implicit answers from the common practices and traditions. He reasons this way because “Any given society is just if its substantive life is lived in a certain way, that is, in a way that is faithful to the shared understanding of the members.”⁴ Regarding Rawls’ concept of justice as fairness, the philosophers mentioned above present us with both constructive and critical critiques. When it comes to matters of justice, everyone has the right to think and act in their own way subsequently, it is something that may be appreciated. These philosophers have the

reasonable freedom and right to agree with Rawls’ theory of justice or not.

1.3 Ronald Dworkin’ Critique on Rawls’ Concept of Justice

Dworkin’s critique is divided into three sections which address the three ideas of Rawls’ concept of justice as fairness. These include the following; Rawls’ social theory, his idea of original position and the veil of ignorance and lastly, his reflective equilibrium.

II. THE SOCIAL CONTRACT THEORY

Concerning Rawls’ social theory doctrine, Dworkin contends with the fact that “Rawls says that the contract is a powerful argument for his principles because it embodies philosophical principles that we accept, or would accept if we thought about them.”⁵ He is convinced beyond reasonable doubt that Rawls’ concept of the contract has to be part and parcel of a deontological theory. It has to be a theory that considers the idea of right as both serious and fundamental within the context of political morality.⁶ He posits that Rawls’ concept of right has to be viewed from a natural perspective and not from neither legal nor conventional perspectives and must not so ever, depend on the deliberations from legislature and social customs.⁷ This is a constructive criticism towards Rawls’ idea of justice as fairness and so, adds value to the pursuit of our justification.

2.1 The Original Position and Veil of Ignorance

Dworkin claims that “Many of Rawls’s critics disagree that men and women in the original position would inevitably choose these two principles. The principles are conservative and the critics believe they would be chosen only by men who were conservative by temperament, and not by men who were natural gamblers.”⁸ He is in agreement with Rawls that “They are men and women with ordinary tastes, talents, ambitions,

² MacIntyre, *After Virtue 2nd ed.*, 249-250.

³ Paul Robert Wolff, *Understanding Rawls: A Reconstruction and Critique of A Theory of Justice*, (Princeton: Princeton University Press, 1977), 179.

⁴ Michael Walzer, *Spheres of Justice*, (Oxford: Basilwell, 1983), 313.

⁵ Ronald Dworkin, *Taking Rights Seriously New Edition*, (New York: Gerald Duckworth & Co Ltd, 1997), 205.

⁶ Dworkin, *Taking Rights Seriously New Edition*, 206.

⁷ Dworkin, *Taking Rights Seriously New Edition*, 214.

⁸ Dworkin, *Taking Rights Seriously New Edition*, 185.

and convictions, but each is temporarily ignorant of these features of his own personality, and must agree upon a contract before his self-awareness returns.”⁹ His interpretation and criticism of Rawls' idea of justice as fairness draws attention to a beneficial component required to achieve the common good and consequently, upholds a common good principle.

Dworkin argues in favor of Rawls by stating that the original position offers us the justification for embracing the two principles of justice over other constitutional foundations. This has to be done in order to secure everyone's interest and must include an idea of antecedent interest and not actual interest. This is due to the fact that, first, the conditions surrounding the decision-making process and judgement determine the judgement of antecedent interest and second, the veil of ignorance readily hinders the parties from learning better principles that they can easily accept and adopt.¹⁰ His argument is substantiated by the fact that “Rawls supposes, for example, that his men would inevitably choose conservative principles because this would be the only rational choice, in their ignorance, for self-interested men to make.”¹¹ His clear comprehension of the rationale behind Rawls' use of the veil of ignorance is of great importance and therefore is relevant when one wants to deal with the common good.

Dworkin concurs with Rawls that the original position is of utmost importance. It serves as the foundation for Rawls' defense of his concept of justice as fairness and which in return, makes his moral theory to present a different mental capacity or rather a new and a different psychological approach. Dworkin concludes that our moral power and sense of justice are fundamentally impacted by Rawls' embodiment of conditions in the original position.¹² Consequently, a limiting power is presented by the parties' ignorance in the initial position over the distorted interests and interests that parties

have.¹³ Dworkin here proves that he is knowledgeable about the reason why the veil of ignorance is important concerning Rawls' concept of justice as fairness. His criticism therefore adds value to the pursuit of our justification.

2.2 Reflective Equilibrium

Dworkin advocates that “Distinctive feature of Rawls's methodology, which he describes as the technique of seeking a ‘reflective equilibrium’ between our ordinary, unreflective moral beliefs and some theoretical structure that might unify and justify these ordinary beliefs. It might now be said that the idea of an original position plays a part in this reflective equilibrium.”¹⁴ Dworkin confirms that Rawls' technique of reflective equilibrium is significant to Rawls' readers' day-to-day lives. This technique enables them to determine which political arrangements and decisions are just and unjust.¹⁵

Just like Rawls, he insists that it is a sole responsibility of moral philosophy in line with Rawls' technique to provide the structure that upholds principles of justice and that is in support of people's convictions or intuitions with two goals in mind, namely; “First, this structure of principles must explain the convictions by showing the underlying assumptions they reflect; second, it must provide guidance in those cases about which we have either no convictions or weak or contradictory convictions.”¹⁶ In Dworkin's view:

The technique of equilibrium supposes what might be called a ‘coherence’ theory of morality... based on two general models namely natural and constructive... Natural model theories of justice, like Rawls's two principles, describe an objective moral reality; they are not, that is, created by men or societies but are rather discovered by them... Constructive model “It treats intuitions of justice not as clues to the existence of independent principles, but rather as

⁹ Dworkin, *Taking Rights Seriously New Edition*, 185.

¹⁰ Dworkin, *Taking Rights Seriously New Edition*, 188.

¹¹ Dworkin, *Taking Rights Seriously New Edition*, 190.

¹² Dworkin, *Taking Rights Seriously New Edition*, 194.

¹³ Dworkin, *Taking Rights Seriously New Edition*, 215.

¹⁴ Dworkin, *Taking Rights Seriously New Edition*, 190.

¹⁵ Dworkin, *Taking Rights Seriously New Edition*, 190-191.

¹⁶ Dworkin, *Taking Rights Seriously New Edition*, 191.

stipulated features of a general theory to be constructed.¹⁷

2.3 Amartya Sen's Critique on Rawls' Concept of Justice

Amartya Sen, like other philosophers, reiterates that “By far the most influential and I believe the most important theory of justice to be presented in this century has been John Rawls' justice as fairness.”¹⁸ Sen identifies the goodness of Rawls' conception of justice. He provides the following reasons for the claim he makes. The first reason is that fairness is crucial, fundamental and prioritized in Rawls' theory of justice. In this case, fairness must precede justice. The second reason is that Rawls advocates for the nature of objectivity for practical reasons within the public framework. The third reason is Rawls' moral powers founded on rational choices and their distinction are very useful tools in explaining his conception of justice. The fourth reason is that Rawls' commitment to prioritizing liberty as being part and parcel of the primary goods is very significant. This is because liberty is separated and it overrides other social arrangements. Rawls' concept of liberty is shared by all and determines personal liberty which gives a person's overall advantage and personal life. Liberty must therefore be taken as a basic necessity for public reasoning and social evaluation purposes. The final reason is that Rawls' theory highlights a solution to the problems of inequalities and social disparities like poverty, gender biases and social status.¹⁹ Sen's criticism is very constructive because it upholds the elements and things needed whenever the common good is discussed and hence, adds value to the pursuit of our justification.

Nevertheless, Sen points out that there are indeed some weaknesses in Rawls' theory of justice which need improvement. He warns that the total priority of liberty is too extreme and dangerous. This is because at its expense, it violates personal

liberty and violates other human wants caused by hunger, starvation and medical neglect among others. He poses a challenge to Rawls' difference principle and insists that opportunities, variations and conversion of primary goods into good living must be put into consideration.²⁰ This same idea is well elaborated when he talks about Rawls' emphasis and distribution of social goods without considering people's capacity to use them as means to pursue their very ends and redress the actual existing inequality.²¹

2.4 The Critique of Rawls' Concept of Justice by Robert Nozick

Rawls' theory of justice has been backed by libertarian philosopher Robert Nozick. In line with this understanding, he contends that “A theory of justice is a powerful, deep, subtle wide-ranging systematic work in political and moral philosophy which has not seen its like since the writings of John Stuart Mill, if then. It is a fountain of illuminating ideas, integrated together into a lovely whole. Political philosophers now must either work within Rawls' theory or explain why not.”²²

On the other hand, he is in disagreement with some of Rawls' arguments concerning his concept of justice. The first disagreement is founded on the idea of social cooperation as it relates to Rawls' definition of society as “A cooperative venture for mutual advantage.”²³ and Rawls' two principles of justice that “Provide a way of assigning rights and duties in the basic institutions of society and they define the appropriate distribution of the benefits and burdens of social cooperation.”²⁴ In Nozick's view, it presents a distributive social justice that makes Rawls' position on it to be problematic. This is due to the fact that it is challenging to decide how to distribute all the benefits of cooperation within the context and spirit of entitlement theory. He claims at the same time that Rawls does not factor

¹⁷ Dworkin, *Taking Rights Seriously New Edition*, 196.

¹⁸ Amartya, Sen, *Inequality Reexamined*, (New York: Oxford University Press, 1992), 75.

¹⁹ Amartya, *The idea of justice*, (Cambridge: Harvard University Press, 2009), 62-64.

²⁰ Amartya, *The idea of justice*, 65-66.

²¹ Amartya, *The idea of justice*, 75-84.

²² Robert, Nozick, *Anarchy, State and Utopia*, (Oxford: Blackwell Publishers Ltd, 1974), 183.

²³ Rawls, *Theory of Justice*, 4.

²⁴ Rawls, *Theory of Justice*, 4.

in the aspect of non-cooperative situations and cases.²⁵

The second point of contention relates to the difference principle and cooperation terms. As was previously discussed, Rawls contends that the difference principle serves as a just foundation for social cooperation between those who are advantaged and those who are not and that the conditions of cooperation must be reasonable. Nozick finds this interpretation perplexing and so, disputes the ideas of fairness of social cooperation and reasonableness of the terms of cooperation. His main reason is supported by the fact that “A deep suspicion of imposing in the name of fairness, constraints upon voluntary social cooperation... so that those already benefiting most from this general cooperation benefit ever more.”²⁶ In keeping with Rawls’ argument on difference principle that describes how disadvantaged persons are willing to cooperate with the advantaged one and vice versa, and therefore, there is no principle of neutrality since there is no provisional grounds for complaints from both sides. Consequently, in Nozick’s view, Rawls supports the idea that a disadvantaged person should never complain when he receives less because inequality is for his advantage.²⁷

Finally, Nozick contends that a historical understanding of distributive justice cannot be produced by Rawls’ original position. This is because “If historical entitlement principle is fundamental, then Rawls’s construction will yield approximations of them at best; it will produce wrong sorts of reasons for them and its derived results sometimes will conflict with precisely correct principles.”²⁸

2.5 Michael Sandel's Critique on Rawls' Concept of Justice

Michael Sandel totally endorses Rawls’ general structure for his theory of justice, which emphasizes the importance of justice, the priority of right over good, and the priority of self

over its end.²⁹ As claimed by him, Rawls adopts Kant’s structure for theory of justice yet he takes a different approach since for Kant “The priority of right, or the supremacy of the moral law and the unity of the self or the synthetic unity of apperception could only be established by means of a transcendental deduction and the positing of a noumenal or intelligible realm as the necessary presupposition of our capacity for freedom and self-knowledge.”³⁰

Rawls while defending the primacy of justice insists that “The self is prior to the end which is affirmed by it; even a dominant end must be chosen from among numerous possibilities.”³¹ Sandel is in total agreement with him when he confirms that “The priority of the self over its ends means that I am not merely the passive receptacle of the accumulated aims, attributes, and purposes thrown up by experience.”³² He attributes two reasons to his argument. The first reason is moral in nature that advocates for the autonomy and respect of the person who holds dignity. The second reason is founded on an epistemological requirement which advocates for an independent identification of a person.³³

Sandel confirms that Rawls’ original position “Enables us to envisage our objective from a far but not so far as to land in the realm of transcendence.”³⁴ For Sandel, Rawls’ original position is equipped with two ingredients, i.e. what is not known by the parties and what is known. What is not known is the deprivation of knowledge about them and that they have a desire and value of certain primary goods. The parties are therefore made ignorant of particular ends that permit them to be fair and make rational choices that safeguard social cooperation, common interests and equal liberty for others. What is known is that parties have the ability to progress while still deciding to follow the

²⁵ Nozick, *Anarchy, State and Utopia*, 185-189.

²⁶ Nozick, *Anarchy, State and Utopia*, 194-195.

²⁷ Nozick, *Anarchy, State and Utopia*, 192-97.

²⁸ Nozick, *Anarchy, State and Utopia*, 2002.

²⁹ Michael Sandel, *Liberalism and the Limits of Justice 2nd ed.*, (Cambridge: Cambridge University Press, 1998), 15-23.

³⁰ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 24.

³¹ Rawls, *Theory of Justice*, 560.

³² Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 19.

³³ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 19-20.

³⁴ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 24.

principles of justice.³⁵ Sandel ultimately agrees with Rawls that the three stages of the original position that must serve as the basis for the principles of justice and must be done in a procedural manner. This is why he discusses that “First comes the thin theory of the good embodied in the description of the initial choice situation. From the thin theory are derived two principles of justice, which defines in return, the concept of the good and provides an interpretation of such values as the good of the community.”³⁶

Sandel, having said that, claims that there are objections to Rawls' conception of justice. He argues that Rawls' moral concept of a person as a subject is not compatible with the empirical features and is therefore inadequate.³⁷ He debates that Rawls' concept of a person in the original position portrays a radical incorporeal subject who cannot make any choices and who at the same time, is too formal and abstract and consequently, is incapable to have contingent motivations.³⁸ Sandel articulates clearly that Rawls' principles of justice in the original position are only discovered and not chosen as opposed to Rawls' claims. This is because they lack the spirit of deliberation and voluntarism and pave the way to cognitivism in the contractual agreement that assists in discovering and understanding the right principles to be chosen.³⁹ For Sandel, Rawls' person's self-reflection towards existing wants and desires is limited and therefore, his aims, values and conception of the good can never be the product of choice.⁴⁰

2.6 Rawls' Replies and Clarifications

In response to Paul Robert Wolff, Rawls guarantees that people's interests are reliant on the institutions that are in place and the principles of justice that they uphold. He goes farther and makes it clearly apparent that his concept of

justice as fairness is based on individualism while also taking into account people's social nature.⁴¹

Rawls justifies his position by stating that:

That original position does not presuppose the doctrine of abstract individualism. This is defined as the doctrine that the fundamental aims and interests of individuals are determined independently from particular social forms; society and the state are regarded as institutional arrangements that answer to these antecedent individual ends and purposes, as specified by a fixed and invariant human psychology.⁴²

Rawls confirms that his two principles of justice govern entitlement principle which is founded on the contributions that are attributed to the forms of cooperation and which are determined by the basic structure of the society. He reiterates that parties in the original position who enter into a contract in order to choose and adopt the principles of justice must do so in an institutional manner. This exercise, consequently, makes his theory of justice to be a social one and not as claimed by Wolff, that is, asocial.⁴³

As maintained by Rawls, his reliance on the Kantian idea of justice was intended to address the political history of the United States, which had been devoid of consensus for a considerable amount of time and required that the basic social institutions be set up in a way that would promote the equality and freedom of morally upright citizens.⁴⁴ This Rawls' view makes political philosophy's goal “To propose to it certain conceptions and principles congenial to its most essential convictions and historical traditions.”⁴⁵

In answer to Alexander Sydney, Rawls cites several arguments for why he is convinced that the idea of a contract is crucial to his theory of

³⁵ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 24-25.

³⁶ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 25-26.

³⁷ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 21.

³⁸ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 27-28

³⁹ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 127-132.

⁴⁰ Sandel, *Liberalism and the Limits of Justice 2nd ed.*, 159-163.

⁴¹ Rawls, “The Basic Structure as Subject”, Alvin Goldman and Jaegwon Kim ed. *Values and Morals*, (Boston: Reidel, 1978), 67.

⁴² Rawls, *Collected Papers*, Samuel Freeman ed., (Cambridge: Harvard University Press, 1999), 267-268.

⁴³ Rawls “The Basic Structure as Subject”, 62-63.

⁴⁴ Rawls, “Kantian Constructivism in Moral Theory”, *The Journal of Philosophy*, 88, 1980, (515-72), 517.

⁴⁵ Rawls, “Kantian Constructivism in Moral Theory”, 518.

justice. These arguments are better understood as “(1) it “reminds” us that separateness of persons is fundamental to justice as fairness; (2) a contract “introduces publicity conditions”; and (3) “reaching a unanimous agreement without a binding vote is not the same thing as everyone’s arriving at the same choice or forming the same intention.”⁴⁶

2.7 Justification from Researcher's Perspective

Rawls makes use of a strictly procedural structure in his idea of justice as fairness. It includes determining how to divide social advantages and burdens, how to allocate fundamental rights and duties and how to arrive at fair and just equality of opportunity. Appropriate social structures, systems and arrangements must govern all of the aforementioned.⁴⁷ Rawls' concept of justice as fairness is justified as the common good principle since the idea of the common good likewise, promotes the same considerations.

Rawls has postulated that free, equal, rational, and reasonable persons with the aim of protecting the rights of others choose and adopt Rawls' two principles of justice in the initial position of equality in order to further their interests. In the original position, social and mutual cooperation and obligation must be evident and be realized through a social and hypothetical contract.⁴⁸ Rawls' device for hypothetical agreement is designed to reveal moral principles in order to seek and ascertain reasonable grounds for reaching that agreement.⁴⁹ This understanding depicts the sense of inclusivity, commitment, responsibility and cooperation, things which are very vital when dealing with the common good. The purpose of the concept of the veil of ignorance is to “Nullify the effects of specific contingencies which put men at odds and tempt them to exploit social and natural circumstances to their own advantage.”⁵⁰ To put it another way, Rawls highlights that some mentality, behaviors

and actions that make people to be biased, prejudiced and discriminative are to be excluded in the original position. This understanding is very key because their existence is really detrimental to the existence of the common good. As a result, Rawls' concept of justice as fairness serves as a justification for the common good principle.

Similarly, Rawls' justice as fairness in relation to his two principles of justice addresses the problems and concerns of just institutions that are applied to the basic structure of society as well as those that deal with people who have a duty to respect the just institutions and each other. People too have a natural tendency to be good and do good to others.⁵¹ Their obligation is brought to light when certain background conditions are attained without extortion, coercion or even violence. The moral principle of faithfulness and the result of the fairness principle must serve as the obligation's navigation device. It needs to encompass implications of the fairness principle, such as the requirement to honor promises made within the social contract.⁵² This argument supports Rawls' idea of justice as fairness as a justification to the common good principle by claiming certain essential components of the common good.

Equal and fundamental human rights and liberties are the subject of Rawls' first principle of justice. Permission of economic and social inequalities is the subject of the second principle.⁵³ Truly speaking, one cannot talk about the common good when human rights and people's freedom are not considered and respected. Permitting economic and social inequalities ensures the prosperity and development of the people and the society, which in return supports the common good idea and therefore is a justification.

Last but not least, Rawls' idea of justice as fairness is highly accommodative. In order to reconcile contradictory and inconsistent judgments, Rawls promotes the idea of reflective equilibrium. He

⁴⁶ Rawls, *Collected Papers*, p. 249.

⁴⁷ Rawls, *Theory of Justice*, 83-87.

⁴⁸ Rawls, *Theory of Justice*, 11-17.

⁴⁹ Rawls, “Kantian Constructivism in Moral Theory”, 519.

⁵⁰ Rawls, *Theory of Justice*, 136.

⁵¹ Rawls, *Theory of Justice*, 114-15.

⁵² Rawls, *Theory of Justice*, 343-46.

⁵³ Rawls, *Theory of Justice*, 60.

upholds that overlapping consensus is a concept that accommodates some comprehensive doctrines that can easily fit well with his theory of justice. This makes the researcher of this study assert that Rawls' concept of justice as fairness is a common good principle.

III. CONCLUSION

A discussion on this article has been majorly on both criticisms and justification. The criticisms are from various philosophers who have various philosophical thoughts yet are guided by the libertarian and communitarian approaches. The Philosophers' primary goal has been to confront and resolve the majority of the urgent and contentious problems pertaining to Rawls' approach and his idea of justice as fairness. Both positive and negative criticisms have been their target. Rawls' primacy of justice, the contractarian process of justice as fairness, social cooperation, original position, veil of ignorance, moral powers, priority of liberty, primary goods, and the notion of the person are some of the underlying principles of their criticisms. Both sides of the criticism are significant from the perspective of the researcher since, in one way or another, they assisted Rawls in refining his theory of justice, which is evident in his other later works besides his first published book entitled "A Theory of Justice". After taking into account Rawls' position and critiques, the idea of justice as fairness to the common good principle is hereby justified.

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Public Debt and Economic Development: Evidence from Nigeria

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ABSTRACT

In developing economies, public debt has increasingly been used as a fiscal policy instrument to finance development objectives amid revenue shortfalls, raising concerns about its effectiveness in delivering long-term economic development. Thus, this study investigated the impact of public debt on economic development in Nigeria over the period 1986 to 2023. The study employed time series data on economic development, proxied by the human development index, external debt, domestic debt, gross domestic saving, and oil revenue collected from the Central Bank of Nigeria Annual Statistical Bulletin, World Bank Development Indicators, and the Debt Management Office, Nigeria. In the analysis, descriptive statistics, trend analysis, unit root test, and autoregressive distributive lag technique were employed. The cointegration test revealed that a long-run equilibrium relationship exists among the variables. From the empirical evidence, external debt had a negative and significant impact on economic development, while domestic debt had a positive but insignificant impact on economic development. In conclusion, the study highlights that domestic debt has a more favorable association with development outcomes, while external debt poses risks if not properly managed. Based on the findings, the study recommended, among others, the government should adopt debt ceiling policies, as well as effective debt sustainability frameworks. The public procurement reform should be sustained and strengthened. This will encourage due process in government dealings. Also, there is a need for the government to partner with civil society organizations to monitor how external debt is being distributed and expended.

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In developing economies, public debt has increasingly been used as a fiscal policy instrument to finance development objectives amid revenue shortfalls, raising concerns about its effectiveness in delivering long-term economic development. Thus, this study investigated the impact of public debt on economic development in Nigeria over the period 1986 to 2023. The study employed time series data on economic development, proxied by the human development index, external debt, domestic debt, gross domestic saving, and oil revenue collected from the Central Bank of Nigeria Annual Statistical Bulletin, World Bank Development Indicators, and the Debt Management Office, Nigeria. In the analysis, descriptive statistics, trend analysis, unit root test, and autoregressive distributive lag technique were employed. The cointegration test revealed that a long-run equilibrium relationship exists among the variables. From the empirical evidence, external debt had a negative and significant impact on economic development, while domestic debt had a positive but insignificant impact on economic development. In conclusion, the study highlights that domestic debt has a more favorable association with development outcomes, while external debt poses risks if not properly managed. Based on the findings, the study recommended, among others, the government should adopt debt ceiling policies, as well as effective debt sustainability frameworks. The public procurement reform should be sustained and strengthened. This will encourage due process in government dealings. Also, there is a need for the government to partner with civil society organizations to monitor how external debt is being distributed and expended..

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I. INTRODUCTION

The attempt by the government to finance budget deficits and projects with high capital requirements led to the emergence of public debt. The budget may include capital expenditures for things like building roads, railways, refineries, steel plants and public social goods like electricity, but there aren't enough funds to support these projects. Investment is a key factor in a country's development, and even while it necessitates domestic savings, it is insufficient to guarantee development (Oloyede, 2002). Governments are responsible with raising living standards through increased salaries, job creation, improved education and more economic and social options with the objective to guarantee that residents have access to necessities like food, shelter, healthcare and protection (Ughulu & Ughulu, 2020).

According to Soludo (2003), there are two main reasons why countries borrow money: macroeconomic ones, like financing increased investment or consumption or to get around strict budgetary restrictions. This suggests that investment serves as a foundation for countries to achieve economic expansion. Government borrowing is used to make large investments in the economy's manufacturing and industrial sectors, which raise income levels, lower poverty and unemployment and boost Gross Domestic Product (GDP). This is a common strategy used by countries to close the gap between revenue and spending, especially when revenues are not enough to cover rising expenditures. The

government of Nigeria has employed deficit finance as a means of fostering economic development and expansion. Since many countries look to borrow from both domestic and foreign financial institutions, including the World Bank and the International Monetary Fund (IMF), public debt is inevitable for governments. No developing country, like Nigeria, can function successfully and efficiently on its own; it needs assistance. The fundamental goal is that developing countries need foreign loans because they lack the funds to undertake capital-intensive projects.

Both the amount of domestic and foreign debt has risen throughout the past year. According to reports, the external debt increased from \$5.66 billion in 2011 to \$9.71 billion in 2014 during President Jonathan's leadership. According to the Debt Management Office Nigeria's statistics (DMO), the nation's external borrowings have been steadily rising since then. Between 2015 and the end of the first quarter of 2020, they were \$10.71 billion, \$11.40 billion, \$18.91 billion, \$25.27 billion, \$27.67 billion, and \$27.666 billion, respectively. This indicates that President Buhari's current government has the most external debts (Debt Management Office, 2020; Akinsanmi, 2020). On the other hand, the nation's internal debt increased from \$41.97 billion in 2012 to \$58.02 billion in 2014 before falling to \$45.99 billion in 2016. The amount of the outstanding domestic debt was \$52.08 billion at the end of 2017, \$54.16 billion in 2018, and \$56.38 billion at the end of 2019, after government began borrowing more from domestic sources in 2017. The entire amount of outstanding domestic debt was \$51.64 billion as of the end of March 2020 (Debt Management Office, 2020).

The Nigerian government has responded to these issues by putting in place a number of programs aimed at promoting and maintaining high growth profiles. With an anticipated yearly growth rate of more than 9%, the government's 2008 Vision 20:2020 plan aims to place Nigeria among the world's 20 biggest and most developed economies by 2020 (Ojo, 2010). Moreover, in 2017, the ERGP was presented with the aim of connecting Nigeria's economy with a 4.5% annual growth rate

(Okwuni, 2019). Despite these attempts, the country remains among the least developed and inflation continues to go up. Nigeria is struggling with broken infrastructure, negative changes in various industries, low comfort for the people and a high poverty rate, despite the benefits of borrowing money. Even though government debt is often paid for by borrowing from both inside and outside the country, these issues remain. There has been a continual increase in Nigeria's budget deficit since 1980, with most of the biggest increases occurring in different years (CBN, 2014). The above issues of public debt fluctuation without significant improvement in infrastructure motivate this study.

Several studies (Hlongwane, 2023; Asravor et al., 2023; Isidora and Luciano, 2020; Nymphas, Emmanuel and Auta, 2023; Biliqees, 2022) have concentrated on the impact of public debt on economic growth and other macroeconomic indicators. Only a few studies (Ikwuo, Ikwor et al., 2024; Anaemena, Onwuatuolo et al., 2023; Ogwu, 2023; Okafor and Isibor, 2022) directed their analysis specifically toward economic development. But the research shows that the role of public debt in economic progress is unclear. To give an example, Anaemena, Onwuatuolo et al. (2023) and Benjamin and Alexander discovered that neither kind of debt played a major part in supporting economic development. On the other side, studies by Okafor and Isibor (2022) and Ogwu (2023) showed that domestic debt was the only type to show positive results. These conflicting results is another motivator of the study.

Hence, based on the aforementioned issues, the study will investigate the impact of public debt on economic development in Nigeria. The following sections is divided into review of literature, methodology, results and discussion and concluding remarks and recommendations.

II. REVIEW OF LITERATURE

2.1 Conceptual Review

2.1.1 The Concept of Public Debt

Public Debt Concept Public debt, national debt and sovereign debt are other names for government debt. In comparison, the yearly government budget deficit is a flow variable that represents the difference between government income and expenditures for a single year. The total of all previous deficits is the debt, which is a stock variable that is quantified at a particular moment in time. "Bureau of the Public Debt Homepage".

Numerous writers and academics have offered explanations for public debt. One of the most straightforward explanations of the idea may be found in Favour, Idenyi, Oge, and Charity (2017). Public debt, according to their definition, is the entire sum of money that the federal, state, and municipal governments owe at any one moment. According to Rais and Anwar (2012), public debt is the debt incurred when the government chooses to borrow money rather than raise taxes to cover the budget deficit. Public debt is defined as the entire amount of debt owed by the federal, state, and municipal governments, as evidenced by public spending through borrowing rather than taxes (Nassir and Wani, 2016, quoted in Eze et al., 2019). Public debt is, however, different from national debt (which is same as federal government debt). The latter precisely indicates the amount borrowed by the national government alone, whereas the former shows the total amount of debt acquired by all levels of a nation's government.

Public debt is defined by the Central Bank of Nigeria (2013) as government borrowing. Additionally, the nation's top bank asserts that it happens when the government chooses to borrow money in order to close budget deficits or support economic growth. This corresponds to the debt owed by every level of a nation's government. The public sector, which includes the government and its agencies, is responsible for these debts. It is, in essence, the entire amount of debt owed by the

State (Chartered Accountants Australia and New Zealand, 2016; Szybowski, 2018).

Public debt is typically contracted to bridge budgetary gaps, for capital formation during economic depression, to finance developmental projects (Akhanolu, Babajide, Akinjare, Oladeji, Osuma), to finance public goods that promote the welfare of the people and increase the growth of the country (Gill and Pinto, 2005), even though the government has other sources of income, such as raising taxes and printing money (Institute of Chartered Accountants of Nigeria, 2014). "Macroeconomic reasons (higher investment, higher consumption (health and education) or to finance transitory balance of payments deficits [to lower nominal rates abroad, lack of domestic long-terms credit or to circumvent hard budget constraints]" are the two main reasons why nations borrow, according to Soludo (2003) (cited in Central Bank of Nigeria, 2013:3). Other reasons, generally advanced to justify the need for a country (or its government) to obtain loans or borrow are as follows:

- Rapidly increasing population, especially in many developing countries; this results into government borrowing in order to expand public enterprise and public utilities to meet the need of the rising population;
- Outbreak of war/crisis and natural disasters, such as: flood, earthquake, sectarian violence and other natural catastrophe, could make the government borrow in order to embark on rehabilitation and reconstruction projects and provision of relief to victims; Opting for public debt allows a more effective way in which country can leverage on opportunities of investment with long congestion periods;
- Government also borrows as an alternative to redundant dependence on printing of money which may result to peaked and capricious inflation;
- Excessive spending, that may be caused by the militarization of the economy, extensive administration or high social transfer (The Institute of Chartered Accountant of Nigeria, 2014; Gill and Pinto, 2005:3; Szybowski, 2018:61).

Domestic debt is the gross liability of government, and if properly considered should include federal, state and local governments transfer obligations to the citizens and corporate forms within the country. They are debt instrument issued by the federal government and denominated in local currency. State and Local government can also issue debt instrument, but instrument currently in use consist of Nigerian treasury bills, government development stock, treasury bonds and federal government bonds.

Domestic debt is debt that originates from within the geographical region of a country which is contracted through debt instrument such as treasury certificate. Internal debt is an asset arrangement that results in citizens giving up their existing purchasing power in exchange for government security; this arrangement has no direct correlation to an increase in real resources. In other words, it is a situation in which the borrowing units obtain the funds from themselves. Therefore, it is possible to say that taxpayers are borrowing from them. The government creates internal debt by tapping personal and corporate savings directly and indirectly. The issue of government bonds or security constitutes `direct government absorption of domestic savings. An indirect method of absorbing private sector's savings by government is by borrowing from the banking system through the sale of bonds and security. However domestic financing or borrowing can also be through outright money creation of borrowing from the CBN. This borrowing has no effect on increasing or decreasing national income.

External Borrowing to refer to as resources borrowed from a foreign nation that are paid back over time with principal and interest. The outstanding amount of balance of payments support that was not able to be paid back when it became due is known as external debt. On the other hand, external debts are due by a nation to international organizations or nations; in other words, the creditors are foreigners. In that event, the servicing and repayment of those foreigners will result in a harm to the nation's resources. "The amount of money that citizens of a nation

have expended and outstanding contractual obligations to non-residents to repay principal, with or without interest or to pay interest, with or without principal, is known as the external debt (World Bank, 2019).

2.1.2 Concept of Economic Development

According to Todaro and Smith (2015), economic development is the gradual improvement of a community as a whole. It entails converting impoverished economies into contemporary industrial ones (Myint & Krueger, 2000). Increases in measures like life expectancy, poverty rates and literacy rates are frequently used to gauge this process (Pritchett et al., 2013). The United Nations Development Programme's (UNDP)-Human Development Index (HDI) is a composite metric that evaluates nations according to GDP per capita, life expectancy and educational attainment (UNDP, 2011).

2.2 Review of Theoretical Literature

2.2.1 The Keynesian Theory

In 1936, John Maynard Keynes wrote *The General Theory of Employment, Interest and Money*. Keynes' upbringing in the classical economics tradition was severely criticized in the article. Keynes advocated for the state to take "an ever-better accountability for openly organizing investment in the economy" and for the inclusive socialization of investment. According to Keynes, the government should borrow money to fund projects like public works and deficit spending would boost the economy's purchasing power and generate jobs. Keynes believes that since fiscal policy serves the interests of the whole public, it is the best way to stimulate economic growth. According to Keynes, when the government borrows money from the general population to pay for its expenses, unemployed people's money is taken out of their pockets, which has no impact on their level of consumption. When the government reinvests these monies in the economy, the aggregate demand rises, which in turn boosts output and employment. Therefore, borrowing by the public can have an impact on macroeconomic performance.

The repayment of debt decreases the resources that can be utilized for investment, which is the transmission mechanism via which debts impact growth. Additionally, public debt can burden future generations by reducing the flow of income from a smaller stock of private capital, so acting as an implicit tax on the resources produced by a nation. This could therefore result in higher long-term interest rates, a reduction in accumulation of capital and a crowding out of private investments that are essential for productivity growth.

2.2.2 Classical Macroeconomics Theory

According to Say (1830), supply generates demand on its own. Put another way, the money made during the production phase is always adequate to purchase all of the items and services that are produced. This indicates that an economy's purchasing power is always enough to cover the cost of all generated products and services. In other words, the total amount of goods and services supplied and demanded is always equal.

The foundation of classical macroeconomics is Say's Law, which is predicated on self-regulating markets. The self-policing money market or credit guarantees that savings do not negate Say's Law. The credit market makes sure that household savings end up in the hands of companies who use them to fund investments. Rising interest rates are said to decrease investment and increase the tendency to save as explained by classical economics. The variable interest rate will always be adjusted to help match the savings of households and the spending by companies. In classical economics, the rise in spending to invest is enough to take up all extra revenue from lower tax or tariff income. As long as investment and savings equal each other, Say's Law will work and situations involving overproduction, persistent unemployment or lower output would not happen. According to classical theory, an increase in savings has positive results since it encourages investment and allows everyone in the economy to be employed at the highest levels at all times.

2.2.3 Harrod-Domar Growth Model

Harrod (1939) and Domar (1946) posit that savings boost economic growth by increasing investment, arguing that since savings are primarily used for investment, an increase in investment will subsequently result in an increase in economic growth. The model looks like this:

$$G = (\Delta Y/Y) = (s/k)$$

Where Y is output or income, s is the savings rate, k is the capital output ratio and G is the output growth rate. The model demonstrates that savings and growth are directly correlated. Because savings lead to investment, which in turn spurs economic growth, raising the savings rate will accelerate output growth.

2.2.4 Human Development Theory

The goal of human development theory, as put out by academics such as Sen (2001), is to increase each person's freedoms and capacities. According to this theory, real progress entails improving social facilities, economic possibilities, political liberties, security and transparency. This could result in government policies in Nigeria that enhance social safety nets, healthcare and education, allowing people to live fulfilling lives and successfully contribute to economic progress.

2.3 Review of Empirical Literature

This study provides empirical review for both cross-country and country-specific research as follows:

Hlongwane (2023) examined the relationship between a number of macroeconomic variables, including real economic growth, domestic and external debt, budget deficit, inflation rate and investment and the impact of public debt on economic growth in South Africa using the ARDL bound test approach. The empirical findings demonstrated that there is a long-term equilibrium relationship between the budget deficit, inflation rate, economic growth and foreign and domestic debt. Additionally, external debt has a negative impact on South Africa's RGDP during both eras.

Asravor et al. (2023) assessed the connection between Ghana's economic growth and the sustainability of its domestic debt. Using information from the Ministry of Finance and the World Bank for the years 1994–2018. The actual results from the ARDL model showed that while an increase in imports slowed economic development and prosperity, an increase in Ghana's domestic debt improved economic growth performance.

Isidora and Luciano (2020) looked into the effect of domestic and local borrowing on the growth of capital markets in South American nations. The study's use of the regression model showed that the inflation rate has a detrimental impact on the growth of the financial markets.

In their analysis of the symmetric and asymmetric effects of external debt on inflation in Sudan between 1970 and 2020, Sharaf and Shahan (2023) used an ARDL model to look at the symmetric effect and a nonlinear ARDL (NARDL) model to look at the asymmetric effect. The empirical results demonstrated that, over the long term, external debt had no statistically significant impact on inflation. Furthermore, the NARDL model showed that both positive and negative external debt shocks have a statistically significant long-term effect on inflation. The findings also showed that inflation is positively and statistically significantly impacted by the domestic money supply.

Ikwuo, Ikwor, Abagha et al. (2024) examined the impact of public debt on economic development in Nigeria (2000–2023) using an econometric analysis of Ordinary Least Square, regression analysis, Augmented Dickey Fuller (ADF), Unit Root Test, Johansen Co-integration Test, and Error Correction Model. The co-integration test evaluation showed that there is an equilibrium long-term relationship between the variables. The analysis's empirical findings demonstrated that Nigeria's economic development is negatively and negligibly impacted by domestic debt.

Ogwu (2023) looked at how Nigeria's economic development, paying off debt and deficit financing changed over the years 1981 to 2022. In the study,

economic development was proxy by HDI and inflation, interest rates, debts and other external and government debt were considered uncontrollable factors. According to the research, an increase in domestic debt led to an improved HDI over the years. Besides, countries with high levels of economic development often experience less inflation, lower interest rates and healthier debt and debt service. In an additional study, Anaemena, Onwuatuelo et al., (2023) examined how government debt affects Nigeria's economy. Researchers collected data from the Central Bank of Nigeria's Statistical Bulletin and the variables examined were HDI and PCI which depended on the exogenous factors of internal and external debts. According to the results of the Granger causality test, neither domestic nor public debt seems to affect PCI or HDI.

Nymphas, Emmanuel and Auta (2023) carried out an evaluation of how the level of Nigeria's state debt had an effect on economic expansion from 1981 until 2020. Stationarity of the effects of external debt, external debt servicing payments and domestic debt on GDP was tested using the unique Phillips Perron test and the Augmented Dickey Fuller unit root test (ADF) which were run on data from the Central Bank of Nigeria and the World Development Indicator. With the ARDL method, it was concluded that both domestic and foreign debt greatly contribute to Nigeria's economic growth. In addition, Nigeria's economic growth over time is weakened because of the money it pays to foreign lenders.

Biliquees (2022) investigated the impact of state debt on economic growth in Nigeria using secondary data spanning 1987 to 2020. The study's findings, as determined by the ARDL approach, showed that foreign debt has a favorable impact on Nigeria's economic expansion. Furthermore, with a coefficient value of 0.0005, local domestic debt has had a substantial and adverse impact on Nigeria's economic growth.

Between 1981 and 2020, Christopher, Godly and Johnbosco (2023) examined the asymmetric link between oil rents and human growth in Nigeria. The research variables' time-series data

came from the World Development Indicators (WDI) and the Human Development Report of the United Nations Development Programme (UNDP). Oil rent has a positive and negligible effect on HDI, according to empirical results obtained using the nonlinear autoregressive distributed lag model. Chima and Chidi (2023) conducted a similar study from 1980 to 2020 using the same methodology in conjunction with the linear and non-linear autoregressive distributed lag (NARDL) approach. The results showed that there are uneven relationships between Nigerian well-being and oil revenue.

Okafor and Isibor (2022) looked at how state debt influenced Nigeria's economic development from 1999 to 2020 using domestic and foreign debt. Since the relationship between the variables needed to be identified, statistics such as mean and standard deviation were calculated. Data for the research was processed by applying the multiple linear regression method. The results indicate that local debt is beneficial for the economic development of Nigeria, whereas external public debt reduces the country's development as indicated by GDP.

To look at government debt on the Nigerian economy, Abdulkarim and Saidatulakmal (2021) ran an ARDL estimate between the time periods 1980-2018. Of the exogenous variables, interest rates, investment in fixed capital, foreign investment, debt service, debt owned domestically and external debt were used and real GDP represented economic growth. Researchers have noted that external debt increased growth of the economy in the short run but reduced long-term economic expansion. The country's economy saw improvements over the years thanks to local domestic debt, but the effect on short-term growth was very slight. In that period, the nation had its economic development hindered by having to make debt payments.

Abdulkarim and Saidatulakmal (2021) used information from 1980 to 2018 to assess the effect of public debt on Nigeria's economic growth. The findings revealed that, even though external debt helped the economy in the short term, it caused harm to long-term growth. Although domestic

debt boosted long-term development, it hurt growth in the current year. There was a delay in economic growth caused by paying off debt which proved the debt overhang effect.

Benjamin and Alexander (2021) studied the link between public debt and economic development in Nigeria from 1981 to 2019 with the help of Johansen cointegration, Ordinary Least Square and Vector Error Correction Mechanism. According to the findings, the growth of Nigeria's economy was limited by their governmental debt. It was revealed that Nigeria's economic growth depends on the prices of oil, changes in interest rates, inflation levels and the amount of investment.

Through the analysis of secondary data sources, Nyekachi (2020) looked at how crude oil trade affected human welfare in Nigeria over the period of 1981 to 2017. Crude Oil Trade was explained by using Crude Oil Revenue as an exogenous variable. Besides, FDO and EXR were used as control variables in all the models. The use of co-integration and error correction mechanism (ECM) showed that, while crude oil revenue seemed linked to human welfare, the relationship was of little significance.

Mathias and Wilson (2019) looked at how gross domestic savings influence the growth of the Nigerian economy between 1986 and 2019 with the help of the error correction model. World Bank World Development Indicators provided the data for gross domestic product, household final consumption expenditure, gross domestic savings, general government final consumption expenditure and net export. Apart from net export, it was found that all the variables have a positive and significant impact on GDP.

2.4 Gaps in Literature

Public debt and its effect on economic development have been the main subjects of the studies included in this review. Harrod-Domar Growth Model, Keynesian theory and classical macroeconomic theory formed the main basis of the discussion. Several studies (Hlongwane, 2023; Asravor et al., 2023; Isidora and Luciano, 2020; Nymphas, Emmanuel and Auta, 2023; Biliqees,

2022) reviewed have concentrated on the impact of public debt on economic growth and other macroeconomic indicators. Only a few studies (Ikwuo, Ikwor et al., 2024; Anaemena, Onwuatuelo et al., 2023; Ogwu, 2023; Okafor and Isibor, 2022) directed their analysis specifically toward economic development. But the findings from previous research show that the impact of public debt on economic progress is unclear. To give an example, Anaemena, Onwuatuelo et al. (2023) and Benjamin and Alexander discovered that neither kind of debt played a major part in supporting economic development. On the other side, studies by Okafor and Isibor (2022) and Ogwu (2023) revealed that domestic debt was the only type to show positive influence. These conflicting results motivated this study. Also, despite these insights, other critical gaps remain unaddressed in the existing literature. First, none of the reviewed studies considered gross domestic saving as a potential mechanism for reducing reliance on borrowing and promoting development. Second, oil revenue, which constitutes Nigeria's primary source of income was excluded from the models examined. Hence, this study includes gross domestic saving and oil revenue among its variables to better examine the effect of public debt on Nigeria's economic growth.

III. METHODOLOGY

This study utilized the ex-post facto research design. According to (Ogwu, 2023), ex-post facto research design makes use of already existing data on historical events. Such information is already in occurrence and cannot be manipulated. The justification for using this design is that the current study utilized already existing quantitative data on the controlled variable and regressors for which the applicable variables cannot be manipulated. This study made use of time series data spanning between 1986 and 2023, and were sourced from Central Bank of Nigeria Annual Statistical bulletin and World Development Indicators (WDI). To determine the order of integration, the econometric methods of the Unit Root Test (ADF) and the preliminary diagnostics test of Ordinary Least Square (OLS) model were employed prior to the application of the appropriate econometric methods of data analysis.

The functional relationship between the dependent variable and the regressors is model in-line with the framework specified by Ogwu (2023), expressing that Nigeria's economic development could be enhanced through government external debt (GED), government domestic debt (GDD), cost of serving debt (CSD), inflation rate (INFL) and interest rate (INTR). Thus:

$$HDI_t = f(GED, GDD, CSD, INFL, INTR) \quad 3.1$$

Based on the empirical literature gap in this study, Ogwu (2023) model is modified in terms of the variables. That is, Human Development Index (HDI) as proxy for economic development,

External Debt (EXDBT), Domestic debt (DDBT), and using Gross Domestic saving (GDS) and oil revenue (OILR) as check variables. The re-modified functional form is re-expressed as:

$$HDI_t = f(EXDBT_t, DDBT_t, GDS_t, OILR_t) \quad 3.2$$

Rewriting 3.2 in econometric form gives the equation below;

$$HDI_t = \gamma_0 + \delta_1 EXDBT_t + \delta_2 DDBT_t + \delta_3 GDS_t + \delta_4 OILR_t + \varepsilon_t \quad 3.3$$

The study carried out logarithmic transformation of the variables so as to linearize the relationship in the model. The expected relationship of the exogenous variables with economic development is that $\delta_1 - \delta_4 > 0$.

After examining the unit root test to make sure there was no spurious regression, the ARDL bounds testing method from Pesaran, Shin and Smith (2001) was applied. This is done after examining the properties of the series shown in the Table 2. Because some of the variables are

stationary at level, I(0) and others are stationary only after one difference, I(1), the ARDL method analysis was chosen. Equation (3.3) outlines the equations for the specification of the ARDL model which are presented below.

$$\begin{aligned} \Delta \ln HDI_t = & \pi_0 + \sum_{j=1}^{\tau} \theta_1 HDI_{t-j} + \sum_{j=0}^{\rho} \theta_2 \Delta \ln EXDBT_{t-j} + \sum_{j=0}^{\rho} \theta_3 \Delta \ln DDBT_{t-j} + \sum_{j=0}^{\rho} \theta_4 \Delta GDS_{t-j} \\ & + \sum_{j=0}^{\rho} \theta_5 \Delta OILR_{t-j} + \delta_1 EXDBT_t + \delta_2 DDBT_t + \delta_3 GDS_t + \delta_4 OILR_t \\ & + \varepsilon_t \end{aligned}$$

3.4

IV. RESULTS AND DISCUSSION

4.1 Descriptive Analysis

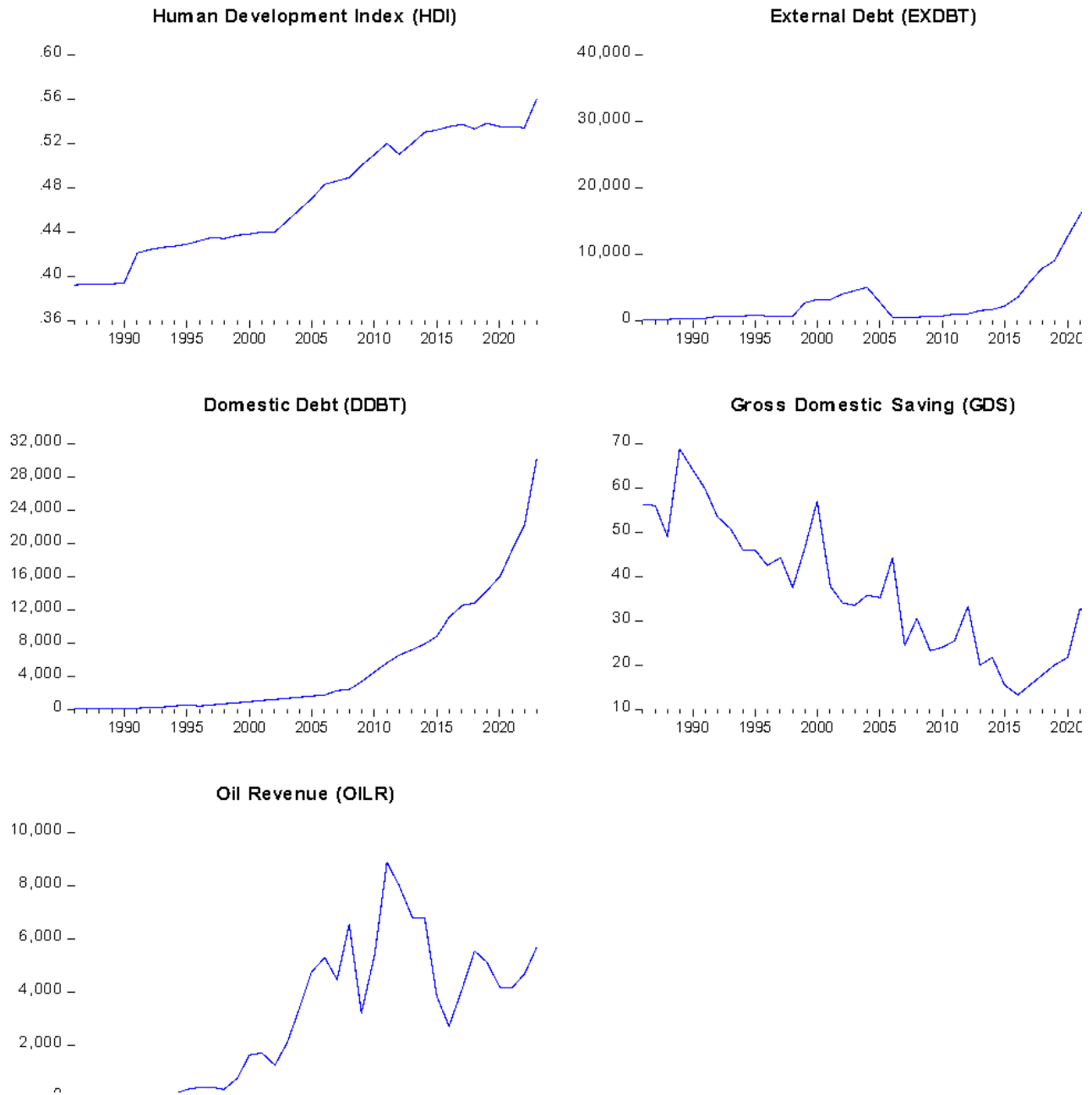
Table 1: Descriptive Statistics Result

	HDI	EXDBT	DDBT	GDS	OILR
Mean	0.471447	3991.047	5255.427	36.92868	2972.170
Median	0.465000	961.8768	1448.116	34.90000	2942.919
Maximum	0.560000	38220.00	30210.00	68.81000	8878.970
Minimum	0.392000	41.45000	28.44000	13.08000	8.107300
Std. Dev.	0.052816	7191.904	7263.571	14.83816	2652.154
Skewness	0.017966	3.306307	1.714205	0.283084	0.402720
Kurtosis	1.580699	15.03501	5.453020	2.142134	1.978459
Jarque-Bera	3.191535	298.5660	28.13789	1.672759	2.679444
Probability	0.202753	0.000000	0.000001	0.433276	0.261919
Sum	17.91500	151659.8	199706.2	1403.290	112942.5
Sum Sq. Dev.	0.103211	1.91E+09	1.95E+09	8146.328	2.60E+08
Observations	38	38	38	38	38

Source: Authors' computation (2025)

Table 1 reveals that Human Development Index (HDI) recorded a mean value of 0.4714, external debt (EXDBT) averaged ₦3,991.047 billion, while domestic debt (DDBT) recorded a mean of ₦5,255.427 billion. Gross Domestic Saving (GDS) as a percentage of GDP averaged 36.9287%, and oil revenue (OILR) showed a mean of ₦2,972.170 billion. The standard deviation values indicate varying levels of dispersion, with EXDBT (₦7,191.904 billion) and DDBT (₦7,263.571 billion) showing the highest variability. The coefficient of skewness shows that all the variables are positively skewed, suggesting longer right tails

in their distributions. However, the normality distribution results (based on the Jarque-Bera probability values) indicate that all variables, except external debt and domestic debt, are normally distributed.



Source: Authors' computation (2025)

Figure 1: Trend Analysis of the Selected Variables

Between 1986 and 2023, Nigeria's HDI rose steadily from 0.392 to 0.56, reflecting gains in education, health, and income, especially post-2000. External debt grew sharply after 1999, hitting ₦38,220 billion by 2023, while domestic debt rose from ₦28.44 billion to ₦30,210 billion, with major growth after 2005. Gross domestic savings fell from 56.31% of GDP in 1986 to 34.6% in 2023, bottoming at 13.08% in 2016. Oil revenue peaked at ₦8,878.97 billion in 2011 but declined to ₦5,663.59 billion by 2023 due to market volatility.

4.2 Unit Root Test Analysis

Table 2: ADF Unit Root Stationarity Test

Variable	ADF @ Level	Critical Value 5%	ADF @ 1 st Difference	Critical Value 5%	Prob.	Status I(d)
$\ln HDI_t$	-2.2389	-3.5403	-5.2471***	-3.5403	0.0007	I(1)
$\ln EXDBT_t$	-1.7293	-3.5403	-4.2299**	-3.5403	0.0101	I(1)
$\ln DDBT_t$	-2.9575	-3.5403	-4.6726***	-3.5403	0.0033	I(1)
$\ln GDS_t$	-2.2917	-3.5403	-8.1328***	-3.5403	0.0000	I(1)
$\ln OILR_t$	3.7794***	-2.9484	----	---	---	I(0)

Note: *, **, and *** denote stationarity at significance level of 10%, 5% and 1%, respectively

Source: Authors' computation (2025)

The unit root stationary test was evaluated using Augmented Dickey-Fuller (ADF) unit root test. The outcomes show that human development index (HDI), external debt (EXDBT), domestic debt (DDBT), and gross domestic savings (GDS) became stationary after first differencing, while only oil revenue was stationary at level form. Thus, the series combine the integration of I(0)

and I(1) fulfilling the requirement for the use of bounds test cointegrating relationship.

4.3 Cointegration Test Result

The cointegration test adopted in this work is the bounds test approach by Pesaran, Shin and Smith (2001).

Table 3: Cointegration Bound Test Result

F-Bounds Test		Null Hypothesis: No levels relationship		
Test Statistic	Value	Signif.	I(0)	I(1)
F-statistic	4.164302	5%	3.05	3.97
K	4			

Source: Authors' computation (2025)

The result above indicates cointegrating relationship given the fact that F-statistics obtained as 4.164302 is higher than the critical value at level I(0) and I(1) series at 5% levels of significance. Based on this, the null hypothesis

which assumes that there is no cointegration among the series is rejected. This implies further that in the long run human development index, external debt, domestic debt, gross domestic savings, and oil revenue have similar trend.

4.4 Model Estimation: Long and Short-run Results (1, 4, 2, 2, 2)

Table 4: ARDL Long and Short Run Results

Dependent Variable: HDI_t				
Panel I: Long Run Results				
Variable	Coefficient	Std. Error	t - Stats	Prob.

$\ln EXDBT_t$	-0.0158***	0.0059	-2.6599	0.0165
$\ln DDBT_t$	0.0016	0.0297	0.0527	0.9586
$\ln GDS_t$	-0.0121	0.0238	-0.5057	0.6196
$\ln OILR_t$	-0.0069	0.0076	-0.9053	0.3780
Panel II: Short Run Results				
<i>Variable</i>	<i>Coefficient</i>	<i>Std. Error</i>	<i>t – Stats</i>	<i>Prob.</i>
<i>C</i>	-0.5534***	0.0981	-5.6397	0.0000
$D(\ln EXDBT_t)$	-0.0154***	0.0053	-2.9330	0.0093
$D(\ln EXDBT_{t-1})$	-0.0058	0.0057	-1.0120	0.3257
$D(\ln EXDBT_{t-2})$	0.0122**	0.0055	2.2281	0.0397
$D(\ln EXDBT_{t-3})$	-0.0106**	0.0045	-2.3905	0.0287
$D(DDBT_t)$	0.0203	0.0143	1.4244	0.1724
$D(DDBT_{t-1})$	0.0309	0.0150	2.0682	0.0542
$D(\ln GDS_t)$	-0.0287**	0.0121	-2.3778	0.0294
$D(\ln GDS_{t-1})$	-0.0483***	0.0115	-4.1844	0.0006
$D(\ln OILR_t)$	0.0124	0.0060	2.0662	0.0544
$D(\ln OILR_{t-1})$	0.0164**	0.0063	2.5836	0.0193
ECM_{t-1}	-0.6903***	0.1214	-5.6863	0.0000
R ² = 0.6941, Adjusted R ² = 0.5411,		Durbin-Waston=1.9025		

Note: *, ** and *** denote significance at 10%, 5% and 1% level

Source: Authors' computation (2025)

The ARDL long- and short-term effects of domestic debt (DDBT), external debt (EXDBT), gross domestic savings (GDS), and oil revenue (OILR) are demonstrated by the results above. Impact of oil revenue and gross domestic savings on HDI's proxy for economic progress. In Panel I, the exogenous variables are analyzed to reveal their long-term effect on HDI and in Panel II, the same variables are shown to represent their immediate effect.

In the long-run model, External debt shows a statistically significant negative correlation with economic development, which is not in line with economic expectations. Economic development will decline by 0.0158% for every unit increase in external debt. The coefficient of domestic debt is statistically negligible, aligns with a priori economic expectations, and has a positive association with economic progress. For every unit rise in domestic debt, economic development increases by 0.0016%. However, both oil revenue

and gross domestic savings are statistically insignificant, have a negative correlation with economic development and diverge from apriori economic expectations.

In the short-term period, higher external debt deviates apriori expectation, and has a negative impact on the country's economic development. Although domestic debt has no discernible effect on economic development, it is positively correlated with it and is consistent with apriori economic expectations. Gross domestic saving had a statistically significant effect on HDI, deviates from the connection predicted by economic theory and shows a negative correlation with economic development. Oil revenue is

positively related to economic development, even though it does not significantly affect economic growth, as expected by the theory. The speed from the short-term dynamic to the long-term equilibrium relationship is 69.03%, according to the statistically significant and accurately described error correction mechanism.

4.5 Post-Estimation Test

In order to guarantee the model's stability and dependability of the ARDL technique, validation of Classical Regression Model assumptions for normality, heteroscedasticity and serial correlation was carried out and is shown in Table 5.

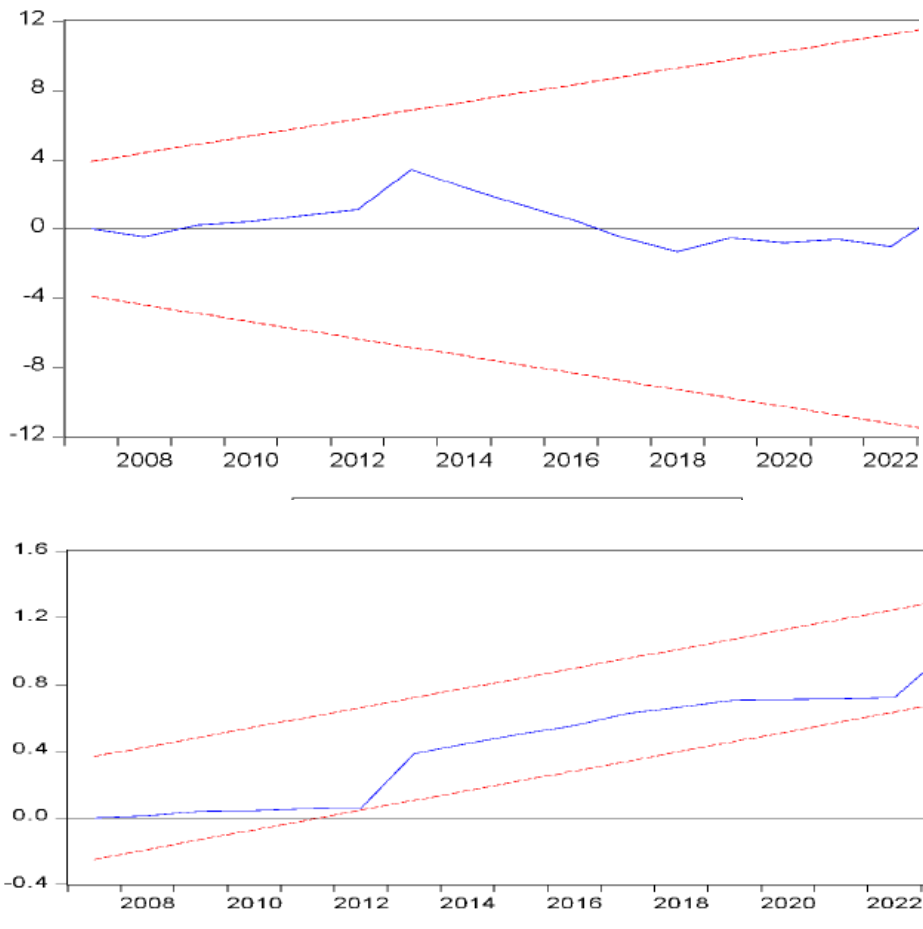
Table 5: Diagnostic Results

Tests Statistics	CLRM Assumptions	χ^2 Statistics Value	Prob. Value	Decision Rule
Breusch-Godfrey LM	Serial Correlation	0.9772	0.9899	Serial independence
Breusch-Godfrey	Heteroscedasticity	0.1232	0.0671	Constant Variance
Jarque-Bera	Normality	0.7866	0.6748	Normal residuals
CUSUM of Squares	Stability	-	-	Stable Model

Note: CLRM = Classical linear regression model

Source: Authors' compilation (2025)

According to the aforementioned findings, the model met the requirements of the classical linear regression model for serial correlation, the random term's constant variance, the normality distribution, and stability. By looking at the CUSUM of squares plot in Figure 2, it is clear that the distributions' estimates do not change or experience any structural failures.



Source: Authors' computation (2025)

Figure 2: CUSUM of Square plot

V. DISCUSSION OF FINDINGS AND POLICY IMPLICATIONS

The discussion of findings of ARDL results between public debt and economic development in Nigeria is as follows.

Firstly, external debt negatively impacts on economic development but is statically insignificant, which is not consistent with economic theory. Economic development decreases by 0.0158% for every unit increase in external debt. External debt also deviates from theoretical predictions in the short run and continues to have a statistically significant detrimental effect on economic development. This result in the short-term aligns with that of the long-term period. This short-term outcome is consistent with the long-term one. The results are consistent with Okafor and Isibor (2022). Policy Implication: It is urged to exercise prudence when

taking on external debt; instead, policy should concentrate on increasing the effectiveness of debt usage and making sure borrowed money is used for profitable ventures. Secondly, the coefficient of domestic debt over the long term is statistically weak, conforms to theoretical expectations, and shows a positive relationship with economic development. A unit rise in domestic debt raises economic development by 0.0016%. In the short-term, domestic debt shows no notable impact on development but remains positively related and consistent with theoretical assumptions. The short-run result supports the long-term observation. This finding corroborates with the result of Okafor and Isibor (2022) and Ogwu (2023). Policy implication, emphasis should be placed on improving the structure and application of domestic debt to foster long-term economic advancement. Thirdly, gross domestic saving is statistically significant in the dynamic model, it still deviates from expected theory and is

negatively correlated with development. In contrast, it is statistically not significant in the static model. The small variation in results is because importance only became apparent in the short-term context. Policy Implication: For beneficial development impact, it is imperative to increase the conversion of savings into investments. Last but not least, oil revenue seems to be statistically negligible, inversely correlated with development, and inconsistent with long-term economic theory. However, oil revenue is consistent with theoretical expectation and has a positive but insignificant impact on economic development in the short-term dynamic model. The finding agreed with the work of significant Chima and Chidi (2023). Policy decisions should focus on diversifying the revenue stream because it helps to smooth out economic changes and ensure better results.

VI. CONCLUDING REMARKS

Public debt impacts on economic development in Nigeria was investigated by this study from the period of 1986 to 2023. Using time series data, sourced from World development indicators and Central Bank of Nigeria annual statistical bulletin, the model was analyzed using the ARDL technique. The empirical findings revealed that external debt negatively and significantly impacts economic development. Economic development was positively impacted by domestic debt but not statistically significant. In addition, gross domestic saving negatively affected economic development while oil revenue has a positive directional effect on economic development in the short run, but negatively impairs development progress in the economy in the long-term period. In conclusion, the study highlights that despite the fact that domestic debt promotes favorable development, it is external debt that carries a huge burden and impedes the overall progress of Nigeria's economic development.

Policy recommendations: The government has to develop effective and prudent borrowing practices and properly watch how external debt is distributed to channel loans into areas that promote the economy's growth and development. Policy changes ought to boost the efficiency of

domestic debt and in parallel, strengthen reforms that help people save money and invest it for the nation's development. Invest in Non-Oil Areas: By putting energy into agriculture, manufacturing and technology and using them for revenue, Nigeria can address the long-term problems that come from depending on oil. These suggestions, when properly carried out, could benefit Nigeria's economy by making growth more inclusive.

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ABSTRACT

Yravedra's (2024) recent reply to our critique of his study on the modern felid-hyena faunal assemblage of Misiam (Olduvai Gorge, Tanzania) fails to provide any empirically-based refutation of our arguments concerning its multi-depositional nature. Furthermore, he has not provided evidence to counter claims of unethical conduct, specifically, the absence of proper permits required by Tanzanian authorities for his independent research. Here, we provide evidence supporting both of these points.

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Some Important Clarifications about Misiam and Deontology

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ABSTRACT

Yravedra's (2024) recent reply to our critique of his study on the modern felid-hyena faunal assemblage of Misiam (Olduvai Gorge, Tanzania) fails to provide any empirically-based refutation of our arguments concerning its multi-depositional nature. Furthermore, he has not provided evidence to counter claims of unethical conduct, specifically, the absence of proper permits required by Tanzanian authorities for his independent research. Here, we provide evidence supporting both of these points.

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I. FACTUAL CONSIDERATIONS

We provided factual information about the analysis of the modern leopard-hyena palimpsest

at Misiam (Domínguez-Rodrigo et al., 2022, 2024), which was met with an unnecessarily aggressive response from Yravedra (2024). By the tone and content of Yravedra's response, any informed researcher can see that none of the arguments we previously presented have been properly addressed or refuted. Contrary to his assertions, we did not divert attention from the debate, but instead went directly to its core, and our objections remain unanswered. Furthermore, ethical issues—such as the publication of research for which Yravedra had no official Tanzanian permits—remain unresolved. Contrary to Yravedra's claims, our arguments hinge on:

- Biased retrieval of materials in the Yravedra's collection (which justifies the absence of small and compact fragments, and deters him from using this absence as the effect of water transportation).
- Lack of any statistically meaningful sample of oriented bones which could justify re-sedimentation. Most of the pockets of anisotropic fabric occur on the upper platform (where gravity is not operating because of its flat horizontal surface), and document autochthonous re-sedimentation in a couple of small rills, not allochthonous transportation.
- Lack of justification for transposing a few locally displaced bones to the whole assemblage. In both our original publication and our critique to Yravedra's analysis we acknowledged moderate gravitational movement of part of the assemblage, but showed that there were multiple depositional *loci*, with the densest one unaffected by this process (Domínguez-Rodrigo et al., 2022, 2024).
- A thick cover of rock and vegetation that prevented mass movement of bones over the area covered by the Misiam bone assemblage

prior to its discovery. A few images of bones on a slope cannot be taken for a reliable substitute of taphonomic arguments justifying gravitational transportation of a whole assemblage. Yravedra's (2024) new figure 5 is pointing out at twigs and vegetation as well as bones on that slope (we published the same spot in our figure S6) (Dominguez-Rodrigo et al., 2024). Small rocks with carbonate patina abound on that slope and their color mimics bones, which, with the exception of two specimens, makes it virtually impossible to differentiate bones from scattered white rocks or other items in that image. See Supplementary Information for a more detailed description of lack of surface runoff processes at Misiam.

- Yravedra uses two bones inside a hole as proof of hyena denning, as if other agents (e.g., leopards, porcupines) could not have done it, especially given the overall completeness of the scapula displayed. Remains of porcupine spines and leopard hair have been found at different times in that den, but no remains of hyenas have ever been documented.
- Yravedra questions the shallow excavation/scrape of a trench, against our opposite arguments, which if true it would reflect the effect of collective hallucination by those of us who participated in it (and have graphically documented it). The fact that Yravedra did not "document" the trench does not mean that the trench was not made, as shown in Domínguez-Rodrigo et al.'s (2024) supplementary files (Fig S1). The coordinates of the trench are: -2.989609/35.347291 (GAIA GPS).
- Yravedra denies the existence of our scraped trench, but then he goes on to argue that no compact bone was retrieved from it. This is inaccurate. Most of the few compact bones retrieved at Misiam come from the scraped trench, containing also bones from all anatomical sections (see Table 1). This complete skeletal profile shows *in locus* deposition of a minimum of two carcasses and disproves that these elements were

accumulated through either water or gravity displacement.

- Yravedra's location of Misiam is also inaccurate, unless the bones that he collected were deposited in a different location from which we collected the rest of the assemblage. If he refers to the location of the densest patch that we all documented in 2016-17, then the actual location is displayed in our Figure 1.

We do not believe that Yravedra is telling the truth when he says that the count of 144 specimens for which we showed orientation data matches the total number of bones that he collected across the Misiam area. Our orientation data derive exclusively from the excavated/scraped trench. As all co-authors of this paper acknowledged, the effort collecting the assemblage involved several other people, as well as the performance of the shallow excavation of the trench described in Domínguez-Rodrigo et al. (2024). Our published photos (Figure S1, 2024) attest to that, and underscores Yravedra's intent to warp reality. This is even more prominent when he claims where we collected the extended assemblage, which he never saw because he was no longer a team member and was not in the field with us. Contrary to his assertions, the precise location of our trench was indicated in our Figures 1 and 2 (Domínguez-Rodrigo et al., 2024). Yravedra also misunderstood that our description of the location containing the wildebeest skulls is not contradictory, since different skull sets were found in different locations. Those that he refers to as found in the leopard's lair occur right on the platform which is part of the lair's extended roof. Whether they were placed there by Yravedra after collecting them somewhere else is a different matter. They were clearly arranged by somebody in the position documented there. They could have come from the bottom of the ravine where the trench was made, as a skull concentration was documented also in that area prior to collection, and where some partial skulls can still be found.

It is important to remark that Yravedra's access to the collection was not restricted, since he never requested access after his dismissal from our project. Yravedra's reprisal brings into the discussion arguments unrelated to Misiam. He

mentions that Calder et al. (2022) raised concerns about our methods in another research, which were extensively addressed and properly responded in Moclán and Domínguez-Rodrigo (2023). Calder et al. (2022), who mischaracterized a substantial amount of studies to create a straw-man argument, were unable to provide evidence of a single case of overfitting in their diatribe against the use of machine learning in Anthropology. In contrast with our rebuttal, the critique by Calder et al (2022) of Yravedra and colleagues' statistical shortcomings remains unanswered. Likewise, McPherron et al.'s (2022) flawed arguments about potential overfitting in our experimental samples -refuted by the analysis of the raw data that we provided to them- were also thoroughly deconstructed in Abellán et al. (2022). Yravedra also uses arguments from Palmqvist et al. (2023), which is chiefly a paper critical with Yravedra's own analysis of the Fuentenueva 3 site (Orce, Spain), and it is completely unrelated to us. Lacking arguments to refute our critique, Yravedra comments on other issues about experimental samples used in other papers, which are completely unrelated to the current debate on Misiam. This is not the place nor time for a response to these issues.

II. ETHICAL CONSIDERATIONS

Most of the comments made by Yravedra in this regard stem from his lack of grasp of the commitments that one acquires when working under a team structure. We do not know if the image that we used of the wildebeest skulls was one of the photos that Yravedra took. All of us took photos, and all these photos belong in the team for which funding and permits are granted. As a matter of fact, all the images taken by the team (except personal ones) end up voluntarily downloaded in a project's working station. This is where we took the skull photo from. Nobody retrieved it from Yravedra's personal camera, and if it ended up in the workstation it must have been with his complicity. These images are the intellectual property of the team and not of individuals, who should not operate independently, given that their funding and permits derive from the team and its management.

Yravedra has disguised his lack of independent permits to conduct the Misiam research and we believe this is an important ethical breach. If he had them, it would be very easy to prove us wrong by showing them. If Yravedra obtained independent additional funds, these were never used for the 2016-17 research at Misiam in Olduvai, since his travel, permits and expenses were fully covered by TOPPP (The Olduvai Paleoanthropology and Paleoecology Project). The projects for BK (by the Spanish Ministry of Culture and Palarq) referred to by Yravedra were granted to conduct research at the site, not as independent work, but as part of TOPPP's research agenda (as a matter of fact, the allocation of funds was managed by TOPPP's co-PIs). We encouraged Yravedra to lead the application for funding only for his curricular benefit and to diversify our funding sources, but we never agreed to let him independently work at BK, as he indirectly acknowledged when publishing his fieldwork report and including the TOPPP team members associated to the project (including one of the co-PIs who applied for that funding with him) (Yravedra et al., 2020). Yravedra's disloyal behaviour, based on the belief that TOPPP could sponsor his particular research, encouraged him later to claim that BK was "excavated by TOPPP between 2006-12 and then by José Yravedra between 2016-19" (<https://fundacionpalarq.com/megafauna-sin-parangon-en-bell-korongo-olduva-i/>). The truth is that he was assigned by TOPPP with the responsibility of managing the excavation of BK as a team member until his dismissal. The site was (still is) under control by TOPPP. The available permits prove this (Supplementary file). We follow the policy of assigning every site to senior team members under the direct control of our management. The dismissal of Yravedra took place when it became obvious that he ambited to supersede the management's mandate, and when he refused to sign a document abiding by the project rules.

In addition, we insist that Yravedra never received permission from the Tanzanian authorities to carry out this research at Olduvai independently from TOPPP in the years that the Misiam assemblage was collected or later. His permits for

the work at Olduvai were exclusively derived from the permits granted to TOPPP and its directors (See documents in the Supplementary file). Under this condition, he conducted his independent research against Tanzanian regulations, and against any ethical and deontological protocols on how to operate when working under a team structure in a project led by somebody else in a foreign country. These are the facts; all the rest is irrelevant.

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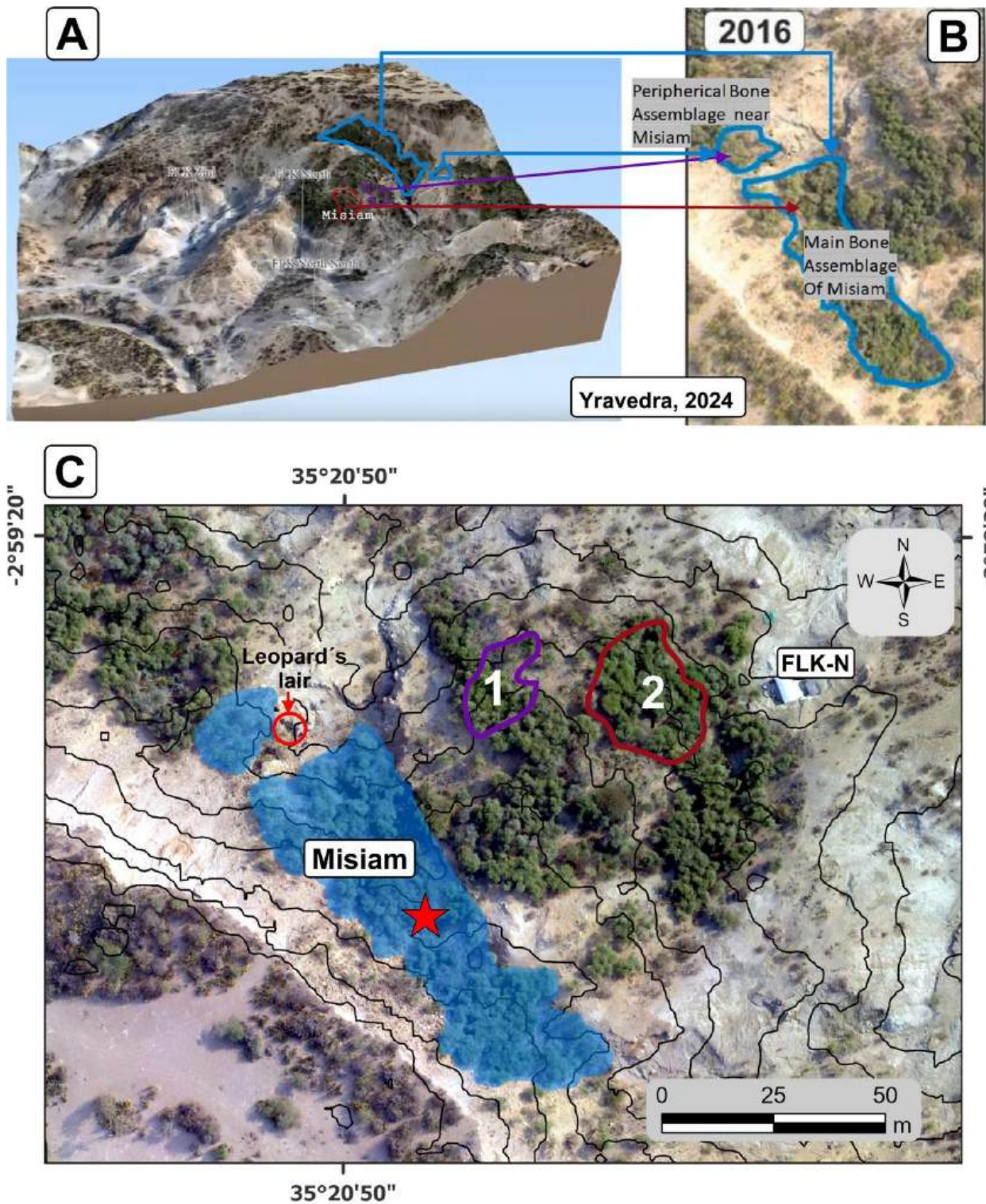


Figure 1: A, figure 2 of Yravedra, (2024), showing the location of Misiam according to the author and Yravedra and Linares-Matás (2024). B, correlation forced by Yravedra (2024) on Figure 2 of Domínguez-Rodrigo et al. (2024). C, orthophoto and topographic map obtained with drone showing the extension of the Misiam site (blue), with the position of the excavation (red star). 1 and 2 the location of the Main Bone Assemblage of Misiam and the Perpherical Bone Assemblage near Misiam, according to Yravedra (2024), as opposed to their real location (blue areas).

Table 1: Number of identifiable specimens (NISP) found in the scraped trench, as identified in the field while conducting fabric analysis. Only 144 specimens showed a clearly defined A-axis to be used for orientation measurements.

	NISP
Cranium	6
Mandible	6
Teeth	5
Atlas	2
Axis	2
Cervical Vertebrae	10
Thoracic Vertebrae	13
Lumbar Vertebrae	7
Sacrum	2
Vertebrae indet frags	23
Ribs	39
Scapulae	11
Pelves	10
Compact bones	3
Humerus	11
Radius-Ulna	4
Metacarpal	4
Femur	8
Tibia	8
Metatarsal	8
Indet	44



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The Original Meanings of the Social Sciences as a Foundation for Illustrating a Renewed Reflection on their Current Situation and Future Challenges

Juan Enrique Opazo Marmementini

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STARTING POINT

The mere act of attempting to say something about the social sciences—their origin, history, development and destiny—is, in itself, an ambitious and excessive endeavor. Who could even produce a state of the art of any of the disciplines or subdisciplines that today fall under that broad label? To say something meaningful in this regard, we would have to rely on the enormous collective efforts that some groups of scholars and certain institutions have undertaken in recent years (Wallerstein, I., 2006; Heilbron, J.; L. Magnusson & B. Wittrock, 1998; Porter, T. and D. Ross, 2003; UNESCO, 2010; UNESCO, 2013).

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The Original Meanings of the Social Sciences as a Foundation for Illustrating a Renewed Reflection on their Current Situation and Future Challenges

Los Sentidos Originales de las Ciencias sociales como Fundamento Para Ilustrar una Renovada Reflexión Sobre su Situación Actual y sus Desafíos Futuros

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I. PUNTO DE PARTIDA

El sólo hecho de pretender decir algo acerca de las ciencias sociales, de su origen, su historia, su desarrollo y su destino comporta, en sí misma una pretensión ambiciosa y desmedida, ¿quién podría elaborar siquiera un estado del arte de alguna de las disciplinas o subdisciplinas que pueden agruparse bajo ese gran rótulo hoy? Para decir algo con sentido al respecto, tendríamos que recurrir a los enormes esfuerzos colectivos que algunos grupos de estudiosos y algunas instituciones han llevado a cabo en los últimos años (Wallerstein, I., 2006; Heilbron, J.; L. Magnusson & B. Wittrock, 1998; Porter, T. and D. Ross, 2003; UNESCO, 2010; UNESCO, 2013).

¿Qué es lo que nos sugieren esas síntesis en términos generales? Primero, que no existen buenas razones para continuar con las separaciones que con tanto esmero procuraron establecer las ciencias sociales en los procesos por institucionalizarse, en el transcurso de los siglos XIX y XX. Segundo, que la infraestructura y la capacidad para realizar investigación de calidad en este ámbito del conocimiento está desigualmente distribuida entre regiones y países. Y, en tercer lugar, que la naturaleza de los desafíos y problemas de la sociedad actual demandan, cada vez más, enfoques inter, multi y transdisciplinarios.

Más allá de los múltiples y diversos espacios institucionales en donde se desarrollan las ciencias sociales se presenta, hoy en día, un punto

de inflexión de gran relevancia. Esto, tiene que ver con la capacidad cada vez mayor de procesar información, así como con la contundente irrupción de la Inteligencia Artificial (IA) en todos los ámbitos de la vida cotidiana, incluido el quehacer científico. El Bigdata y la IA, en tanto desarrollos tecnológicos de vanguardia, están incidiendo de forma acelerada no sólo en aquello que nos pasa como sociedad, sino también en la manera en que procuramos comprenderla.

Para las ciencias sociales, estos desarrollos están teniendo profundas connotaciones en su razón de ser: ontológicas (en términos de cuál es su foco de estudio); epistemológicas (en cuanto a los fundamentos de cómo nos aproximamos al conocimiento de los fenómenos sociales); metodológicas (en la medida en que surgen nuevas estrategias a través de las cuales recabamos la información que conforma y valida nuestros estudios), y, por cierto, éticas (en términos de qué se puede o no hacer con la información que capturamos, y el conocimiento que construimos y utilizamos a partir de ello).

En el intento de hacer frente a esos desafíos surgen algunas interrogantes: ¿constituye la situación descrita algo plenamente novedoso?, ¿estamos, para utilizar la expresión de Foucault, en presencia del surgimiento de una nueva “episteme”? y si esto es así, ¿cuáles son sus características y cómo incide esto en el destino de las ciencias sociales y sus eventuales aportes a los problemas que la sociedad actual le demanda?

La reflexión que proponemos en este escrito no tiene que ver con dibujar escenarios futuros y anticipar lo que podría ocurrir. Tomaremos un

camino diferente: nuestra invitación es retornar al origen, esto es, al surgimiento de las primeras nociones de ciencias sociales, sus sentidos y sus énfasis. Quizás, a partir de este ejercicio podamos sacar aprendizajes interesantes para ampliar nuestra mirada y comprender, en parte, el tránsito en el que hoy nos encontramos.

El objetivo de este trabajo es esbozar y discutir una genealogía de las primeras nociones acerca de las ciencias sociales, a partir de lo que estudiosos y especialistas nos han sugerido al respecto. Nuestra hipótesis es que, en ese tránsito, en el que las ciencias sociales pasan de ser un grupo indiferenciado de discursos y prácticas con intenciones transformadoras, a un conjunto de disciplinas que comienzan a diferenciarse e individualizarse, se presenta un cambio sustantivo, un quiebre. ¿Qué podemos aprender de ese proceso para ilustrar los retos que hoy enfrentan las ciencias sociales considerando los desarrollos tecnológicos presentes y potenciales? Esta inquietud tiene, como todo ejercicio intelectual, un sentido de actualidad. En efecto, surge a partir de un desasosiego. Un descontento con la concepción y práctica de unas ciencias sociales imbuidas de cientificismo, de la hegemonía de un empirismo ingenuo, que, en muchos casos, renuncia a la necesaria reflexión pausada y sustantiva que requieren los procesos de transformación social e institucional que vivenciamos de forma tan acelerada.

En la medida en que las corrientes principales del hacer ciencia se sustentan únicamente en lo que realizan las denominadas ciencias duras y/o ciencias exactas, las ciencias sociales sufren un retroceso en su dimensión reflexiva, así como en el sentido y orientación que se auto atribuye.

Cuando Gadamer (1977) nos invitó a ampliar los horizontes de las “ciencias del espíritu” –concepto que, por lo demás, él mismo atribuye a una inadecuada traducción al alemán de las “social sciences” de Mill-, no lo hace con un afán meramente retórico, sino a partir de un genuino interés por encontrar un marco más pertinente para su auto comprensión y, de allí, otorgarle sentido a su quehacer. Resulta interesante que hoy, más de 60 años después de la publicación de

su gran obra, Verdad y Método, esa invitación resulte todavía más necesaria. Trazar las huellas de la vinculación de las “ciencias del espíritu” con la tradición del humanismo no fue para Gadamer sólo un trabajo de erudición y revisión histórica, sino un urgente llamado a pensar acerca de lo que realmente son y lo que hacen.

Este documento se estructura en función de los siguientes acápites. Se parte por recuperar los sentidos e intenciones originarias de las ciencias sociales, a la luz de nueva evidencia disponible. Luego se releva la connotación práctica aplicada y específica que adquiere la idea de ciencias sociales hacia fines del siglo XVIII. En tercer lugar, destacamos los trazos generales del paso que va desde las ciencias sociales en un sentido general, a la propuesta de una ciencia de la sociedad, así como a un conjunto de otras disciplinas independientes. Finalizamos el escrito con una reflexión sobre la necesidad de pensar el derrotero de las ciencias sociales, a la luz de lo expuesto.

II. EL ORIGEN DE LA NOCIÓN DE CIENCIAS SOCIALES Y SUS DIVERSOS SENTIDOS¹

Históricamente, la noción de ciencias sociales es anterior a la idea de sociedad –entendida como objeto de estudio-. Al mismo tiempo, la noción de ciencias sociales es anterior a la idea de una ciencia de la sociedad –en tanto una disciplina específica y diferenciada-. Investigaciones recientes sugieren un interesante campo para indagar acerca de los sentidos y usos originales de la noción de ciencias sociales y sus énfasis (Lalevé, 2023).

Para avanzar en una caracterización sistemática de las connotaciones que tuvo la noción de ciencias sociales en sus inicios hay que acudir tanto a filósofos como historiadores. Desde el punto de vista filosófico, lo primero que se nos advierte es el potente nexo entre filosofía moral y

¹ Si bien la diferencia entre “ciencia social” y “ciencias sociales” comporta más que una cuestión puramente semántica, en este escrito nos referiremos a la noción de ciencias sociales en términos plurales sin entrar en el debate acerca de si es posible una sola ciencia social y en qué términos sería eso posible.

ciencias sociales. Gordon (1991) destaca la centralidad de este vínculo, sobre todo en el siglo XVIII, en donde todavía las distintas ciencias sociales estaban lejos de adquirir una fisonomía e identidad propias. Bryson (1932), por su parte, nos advierte acerca de las relaciones que, de alguna forma, toda ciencia social guarda con la filosofía moral, en términos de las perspectivas que va considerando o no en el proceso de convertirse en una ciencia independiente. Esto va desde la forma lógica y abstracta de proceder; el modo en que cada disciplina se funda siempre sobre supuestos, más o menos explícitos, relativos a la naturaleza humana; hasta el afán por enfrascarse de forma directa en aplicaciones que apuntan a la mejora de la sociedad. “Todo esto era parte integrante de la filosofía moral en la que tuvieron sus inicios y que los historiadores de las ciencias sociales han tenido muy poco en cuenta” (Bryson, 1932: 323). Mientras más indiferenciadas están las ciencias sociales, menos pueden desvincularse de los fundamentos, de todo orden, que una aproximación más integral a lo social humano demanda.

Historiadores de las ideas, así como estudiosos de las ciencias sociales, han sostenido que la noción de ciencias sociales habría sido acuñada y utilizada por primera vez en el contexto de la revolución francesa. McDonald (1993) atribuye su invención a Condorcet (McDonald, 1993: 171). Sucesivas investigaciones llegaron al consenso de que habría sido el abate Sieyès quien, en 1789, en su texto “Qué es el tercer estado” habría utilizado esta expresión por primera vez (Baker, 1975: 391 y siguientes; Head, 1982: 123-124; Wittrock, Heilbron & Magnusson, 1998; Wokler, 1998: 42). En ese contexto, refiriéndose a la relación entre la aristocracia y el tercer estado, señala Sieyès que, “[s]i deseamos considerar el tema, con independencia de todo interés particular y atendiendo a los iluminadores principios que provee la ciencia social, veremos que la cuestión adopta un aspecto enteramente nuevo. En efecto, se entiende que no se pueden asumir ni las peticiones del tercer estado, ni la defensa de los privilegiados, sin remover las convicciones más asentadas” (Sieyès, 2019: 34).

No obstante, el reciente descubrimiento de Lalevée (2023) indica que ya en 1767, en el contexto de la publicación seriada “Éphémérides du citoyen ou Bibliothèque Raisonné des Sciences morales et politiques”, Victor Riquetti, marqués de Mirabeau, un fisiócrata declarado, seguidor y colaborador de Quesnay, se habría referido a la idea de ciencias sociales por primera vez. Si se revisa la evidencia que presenta Lalevée², en el Tomo IX de la publicación indicada, del año 1767, no aparece la expresión “la science sociale”, sino la expresión “la science économique” (Mirabeau, 1767, Tomo IX: 68). En el Tomo X, del mismo año, aparece la expresión “la science sociale”, y lo hace en el contexto de una cronología que este autor está exponiendo respecto al devenir de las naciones europeas:

“Esta digresión os ofrece más o menos la historia fiscal de todas las naciones pasadas y presentes, es decir, la de su constitución política y fiscal; porque una vez más, este es el punto fundamental. Tomo como ejemplo el de toda Europa, que, digamos, es la más avanzada en ciencias sociales y en todos los conocimientos que de ellas se derivan: no tiene sentido volver a visitar cosas del pasado, si no sacamos conclusiones de ella para el futuro (Mirabeau, 1767, Tomo X: 63).

La intención de Lalevée es comparar las nociones que Mirabeau, Sieyès y Condorcet tuvieron acerca de la idea de ciencias sociales. “Estos pensadores desarrollaron diferentes respuestas a esta pregunta, y lo hicieron a través de diferentes maneras de pensar sobre el significado y el propósito de una ciencia de la sociedad, o ciencias sociales” (Lalevée, 2023: 1024, cursivas nuestras). La tesis de este autor resulta provocativa pues, a diferencia de interpretaciones que visualizan una evolución lineal del pensamiento ilustrado francés respecto al desarrollo de las ciencias sociales, plantea una posición diferente: “la historia de las primeras ciencias sociales francesas se entiende mejor no como un proceso de avance gradual, sino más bien como uno de reinención en serie” (Lalevée, 2023: 1025).

² Ver Lalevée 2023, Nota a pie de página N° 1, página 1023.

El punto es que Lalevée no diferencia rigurosamente entre la idea de ciencias sociales y la de una ciencia de la sociedad. Quizás esta distinción no tenga tanto sentido o resulte demasiado exigente y no posea una utilidad analítica inmediata, en el periodo que va desde 1760 hasta fines del siglo XVIII, dado que no existía todavía claridad respecto a un objeto de estudio específico, ni se tenía claro un conjunto de criterios compartidos por una comunidad de pensadores que pudiera fundamentar unos límites disciplinarios con precisión. Sin embargo, la distinción entre ciencias sociales y una ciencia de la sociedad tendrá una connotación de suma relevancia, en función de las perspectivas que van a proponer Saint Simon y, sobre todo, Comte, a partir de la década de 1820. A nuestro juicio, la idea de una ciencia de la sociedad, en el sentido de estos autores, constituye un punto de ruptura con la noción de ciencias sociales a la que se refirieron los ilustrados franceses, al menos, hasta Condorcet y los llamados “ideólogos” (grupo representado por aquellos pensadores que buscan fundamentar una ciencia de las ideas entre cuyos representantes el más destacado fue Destutt de Tracy).

Lalevée destaca que la primera connotación vinculada a la idea de ciencias sociales, en los términos en que Mirabeau la concibe, fue más bien negativa. “En su explicación, esta ciencia estaba asociada con las políticas de expansión imperial y comercial que los estados europeos habían seguido desde principios de la era moderna, y esas políticas habían colocado a estos estados al borde del colapso. La ciencia social, desde esta perspectiva, era la ciencia de los experimentos fallidos” (Lalevée, 2023: 1024). Así, en la lectura de este autor, mientras que para Sieyès el foco desde el cual se les observa tiene que ver con el problema de la representación política y los conflictos entre la aristocracia y el tercer estado, para Mirabeau, las ciencias sociales se asociaban a la expansión imperialista de los estados europeos y su consiguiente fracaso.

A pesar de que estas dos primeras nociones de ciencias sociales distinguidas por Lalevée no parecen haber gozado de una consideración pública significativa, algunos autores han

señalado una estrecha relación entre los tempranos planteamientos de los fisiócratas, partidarios de lo que llamaron “l’art social” (el arte social, que identificaron con las “ciencias del orden social” y con las “ciencias de la vida humana”), y el uso que culminaron haciendo de la idea de ciencias sociales los “ideólogos”, luego de 1795, en Francia (Baker, 1975; Head, 1982). En esta línea, Head (1982) postula que la idea de ciencia social de los “ideólogos” está prefigurada ya en los escritos de los economistas fisiócratas, quienes, concibiéndola bajo el rótulo de “l’art social”, la entendieron *como una “ciencia unificada de política pública”* (117, cursivas nuestras). Resulta interesante que Head vincule, a diferencia de Lalevée, esta perspectiva aplicada de la ciencia social, desde sus inicios, otorgándole así un antecedente de continuidad a la idea.

A juicio de Lalevée, para Condorcet, la tarea de las ciencias sociales habría sido contribuir a la racionalidad de los actores para fortalecer y validar sus decisiones, en aras del bienestar de la humanidad en su conjunto. Como veremos con mayor detenimiento, esta connotación resultará crucial para la auto comprensión de las ciencias sociales en términos de su misión, su orientación general, y sus eventuales aportes. Para profundizar en esta impronta reformista, se deben discutir las connotaciones que sobre las ciencias sociales se tuvieron en el periodo de la revolución francesa.

III. LA CONNOTACIÓN DE CIENCIAS SOCIALES EN EL CURSO DE LA REVOLUCIÓN FRANCESA

La noción de ciencias sociales si bien habría quedado establecida en los años previos a la revolución francesa, su validación, se habría dado en el curso de ésta. En ese contexto, el uso del término evidencia una clara impronta práctica aplicada (Baker, 1964; Baker 1975; Head, 1982; Crépel & Rieucan, 2005; Lalevée, 2023).

Para una comprensión más cabal del cambio conceptual y los énfasis que adquiere la noción de ciencias sociales en ese marco, es preciso hacer referencia a un conjunto de hitos históricos del periodo. Nos interesan aquellos sistematizados

por Brian (1998). Primero, a partir de 1772 comienzan a realizarse los primeros survey de forma sistemática por parte de la administración del Estado en Francia. Luego, a partir de la década de 1770, el avance en el campo de la teoría de las probabilidades en matemáticas fue notable en términos teóricos, pero también en cuanto a su aplicación a los ámbitos sociales y naturales. En tercer lugar, en las décadas de 1780 y 1790 el cálculo integral y diferencial fue innovado a partir de los aportes de los matemáticos que formaban parte de la Academia de París. Finalmente, en ese tiempo, en Francia, se incrementa la publicación de trabajos en materias relativas a política económica y a población (Brian, 1998: 207 y siguientes). Habría que agregar aquí el desarrollo de las estadísticas aplicadas a la población hacia fines del siglo XVIII y comienzos del siglo XIX, como nos lo sugieren los estudios de Donnelly (1998). Así, los desarrollos de vanguardia de las matemáticas, en especial la teoría de las probabilidades, fue puesta en relación directa con los problemas sociales de la época, ya desde la década de 1770.

¿Qué connotaciones arrastra consigo la noción de ciencias sociales en el específico y convulsionado periodo en que se enmarca la revolución francesa? la figura clave aquí es Condorcet. A partir de su nombramiento como secretario permanente de la Academia de Ciencias de París, en 1776, Condorcet abrazó la causa de promover el avance científico en todos los ámbitos. Lo esencial de ese impulso fue el vínculo que realiza entre ciencia y reforma social. En su temprana concepción de las ciencias sociales, Condorcet procura vincular directamente el conocimiento matemático, principalmente aquel referido a la teoría de las probabilidades, al avance de lo social. La ciencia social, en ese período es “matemática social”. Adicionalmente, los términos “sciences morales, sciences politiques y sciences morales et politiques, aparecen frecuente e indistintamente en la obra de Condorcet en las décadas de 1770 y 1780, para ser reemplazados gradualmente en sus escritos posteriores por los más modernos de “ciencias sociales” e, incluso, “ciencias metafísicas y sociales”” (Baker, 1975: 197; Crépel & Rieucan, 2005).

El clamor inmediato surgido luego de la toma de La Bastilla, generó la rápida organización de varios grupos de pensadores e intelectuales. Uno de esos grupos fue la llamada “Sociedad de 1789”. Condorcet fue uno de sus miembros fundadores. Uno de los objetivos de este grupo fue aportar al proceso con una propuesta de rearticulación del orden social. Allí, las ciencias sociales debían cumplir un rol de racionalizadores de las decisiones: la ciencia social es “l’art social” (el arte social). “Considerábamos el arte social como una verdadera ciencia, basada como todas las demás en hechos, experimentos, razonamientos y cálculos; susceptible, como todas las demás, de progreso y desarrollo indefinidos, y volviéndose progresivamente más útil a medida que se difunden sus verdaderos principios” (Condorcet, citado en Baker 1975: 274). Vinculado al concepto de ciencia social adoptado por la “Sociedad de 1789” estaba el objetivo de desarrollar y explotar al máximo los recursos económicos de la nación.

La forma en que Condorcet y otros miembros del grupo reaccionan frente al proceso, fortalece los planteamientos y esperanzas de reorganización social sobre una base racional. Esa es la razón por la que este autor, en parte de sus escritos, trajera a colación a Francis Bacon, pero no al Bacon del *Novum Organum*, sino al de *La Nueva Atlántida*, novela utópica publicada en 1626. Allí, el rol del conocimiento es central para la organización social, y el rol de la ciencia y la técnica son fundamentales para un modo de vida armónico, base para el bienestar general de la población.

El modo más relevante en que trataron de ser integradas y proyectadas las ciencias sociales, fue a través de las propuestas de reforma del sistema educativo, en plena revolución. “Fue Talleyrand quien en primer término presentó un plan para la educación pública a la Asamblea Legislativa, en septiembre de 1791, en donde se destaca la importancia de enseñar los principios del “arte social”. Sin embargo, será Condorcet quien desarrolle una propuesta en el contexto de una serie de artículos acerca de educación pública, publicados durante 1791 en la *Bibliothèque de l’homme public* -una revista que ofrece un compendio de escritos sobre ciencias morales y políticas- fundada por él mismo en su continuo

intento por guiar la opinión pública según principios racionales” (Baker, 1975: 285).

Cuando Condorcet presenta su plan de formación a la Asamblea Nacional, en 1792, la ciencia social ha adquirido una connotación más precisa y claramente aplicada (Wokler, 1998: 42 y siguientes). En ese contexto, la *ciencia social, estrictamente definida, no se ocupa tanto del análisis empírico de los fenómenos sociales, como de una teoría de la organización social que debe ser racionalmente desarrollada a partir de esos primeros principios*” (Baker, 1975: 201, cursivas nuestras). Por esa razón es que las ciencias sociales son integradas en el curriculum como materias a ser enseñadas en los Liceos para la formación de todo ciudadano. Los contenidos de esas materias agrupadas en las ciencias sociales tuvieron que ver con un “intento de conformar una introducción a la “ideología”: comenzando con el análisis de las sensaciones, desarrollando los principios del lenguaje y la lógica de las ciencias y, finalmente, demostrando la aplicación de estos principios a la moral y las ciencias políticas.

En orden a apoyar este desarrollo curricular, se encargó a Destutt de Tracy -quien también fuera miembro de la “Sociedad de 1789”- la elaboración de los textos” (Baker, 1975: 392). Hasta 1805, este autor habría culminado de escribir tres tomos. En 1806 y 1807, sigue trabajando en el material que nutriría el curriculum de las ciencias sociales. El trabajo que desarrolla en ese periodo es un análisis de El espíritu de las Leyes, de Montesquieu, en donde señala haber encontrado los elementos fundantes de un sistema de ciencia social completo (Baker, 1975: 393).

No obstante, la hostilidad de Napoléon hacia las reformas en el sistema educativo en la línea de las ciencias políticas y morales, habrían desalentado la publicación de estos estudios por parte de Destutt de Tracy en Francia. A partir de este hecho, surge una de las líneas que lleva la noción de ciencias sociales desde el contexto francés, al inglés. En efecto, Destutt de Tracy prefiere enviar su trabajo a los Estados Unidos. Y habría sido nada menos que Thomas Jefferson, amigo de los “ideólogos”, quien recibió el trabajo para su

traducción y publicación y quien, de alguna forma, aceptó y validó el neologismo en inglés: social sciences.

Sin embargo, la llegada de la idea de ciencias sociales a Inglaterra no habría sido directamente por esta vía, sino por una curiosa transición que involucra a España. La recepción de las ideas de Bentham en España, estuvo estimulada por uno de sus discípulos, el suizo Dumont, quien estimuló las traducciones al español de los escritos de este autor. La primera de varias traducciones de este tipo que aparecieron durante la década de 1820 contenía una selección de las principales doctrinas de Bentham bajo el siguiente título: “Espíritu de Bentham: Sistema de la Ciencia Social”. En una carta al editor de este trabajo, el español Toribio Nuñez (traductor y divulgador de las obras de Bentham), Bentham lo felicitó sobre la pertinencia del uso del término.

La idea de ciencias sociales no se afianzó en el ámbito de la intelectualidad inglesa, hasta después de la década de 1820. En efecto, la investigación de Senn (1958), llegó a la conclusión de que Mill habría utilizado la idea de ciencia social hacia 1836. Iggers (1959) señaló que luego de 1829, el término ciencia social se usó con frecuencia entre los escritores ingleses, y que el mismo Mill la habría utilizado incluso antes de esa fecha. Burns (1959) confirmó que el uso de la idea de ciencia social por parte de Mill puede datarse con claridad ya en 1829.

Sin embargo, ese uso está ya en la línea de la interpretación que Comte hace de las ciencias sociales en el viaje que lo llevará a concebir una ciencia de la sociedad. Ese uso puede rastrearse hasta su escrito de 1822, denominado Plan des Travaux Scientifiques Necessaires pour Reorganiser la Societe, y traducido más tarde como Systeme de Politique Positive. Ese uso supone ya el desarrollo de un ámbito de estudio en vías de diferenciación y especificación.

Antes de que ese proceso comience a consolidarse, esto es, antes de que las ciencias sociales comiencen a desaparecer como discurso indiferenciado, es necesario rescatar un hito crucial relativo al legado intelectual de Condorcet,

luego de su muerte, en 1794. En el marco dramático que toma el curso de la revolución en ese periodo, Condorcet, alcanza a culminar su obra más conocida, el *Esquisse d'un tableau historique des progres de l'esprit humain* (Bosquejo de un cuadro histórico del progreso del espíritu humano). Este texto, un clásico del pensamiento moderno y uno de los más importantes que se ha escrito sobre la idea de progreso, habría sido completado en octubre de 1793. Si bien la idea de ciencias sociales no aparece con frecuencia en el texto, el planteamiento general del Bosquejo las considera de forma implícita.

La tesis de Baker respecto de este crucial escrito es que, “el propósito fundamental de Condorcet no fue presentar las leyes de una sociología histórica que amenazaría con absorber la acción, sino *demostrar la libertad del hombre para promover el progreso humano mediante el arte social racional*” (Baker, 1975: 343, cursivas nuestras). Nos interesa rescatar esta perspectiva, porque es precisamente la interpretación y apropiación que los teóricos de la ciencia de la sociedad hacen de ese trabajo a posteriori, lo que evidencia un tránsito histórico de relevancia: el comienzo de un proceso de diferenciación. En ese proceso, las nociones y sentidos originales vinculados a las ciencias sociales, culminan por diluirse.

IV. DE LAS CIENCIAS SOCIALES A LA CIENCIA DE LA SOCIEDAD

Lalevéé (2023) llama la atención en términos de que hubo varias versiones de ciencia social antes de que la sociología surgiera como disciplina. Compatible con esa idea, a juicio de Baker (1975), la propuesta de ciencias sociales de Condorcet cabe comprenderla en una dirección diferente de lo que fue el surgimiento posterior de una sociología positiva, esto es, de una ciencia de la sociedad.

Baker (1964, 1975), sugiere en sus estudios que Condorcet habría sostenido tres ideas fundamentales sobre las ciencias sociales, que cabe considerar y destacar de forma separada. “La primera de ellas, para la cual conservó

consistentemente el término ciencia social, constituía los principios racionales de organización social derivados de la naturaleza del hombre por el método del análisis de sensaciones e ideas. Esta fue la idea que se convirtió en la preocupación central de los “ideólogos”, y que, pese a la caída en desgracia de Condorcet, dominaron el sistema educativo finalmente establecido por la Convención en 1795. Las ciencias sociales fueron consagradas como parte del curriculum, en términos de clases de “ciencias morales y políticas”, en el Instituto de Francia, en la sección de esa clase dedicada a “ciencias sociales y legislación”.

Una segunda idea de Condorcet sobre las ciencias sociales, tuvo que ver con la consideración de una ciencia estadística integral del hombre en sociedad, que sometería los hechos de la existencia humana a un análisis empírico mediante cálculos matemáticos. No fue hasta la década de 1830 que esta segunda concepción de las ciencias sociales de Condorcet alcanzó su pleno desarrollo, pero no en la línea que iban a emprender Saint Simon y Comte, sino en la de la “física social” del matemático belga Quetelet.

Una tercera dimensión de las ciencias sociales radicaría en que el “arte social” racional revolucionaría continuamente las condiciones de la existencia humana. Condorcet creía que un arte así, una vez convertido en científico mediante la matematización de la elección social, pasaría a ser el instrumento consciente del progreso humano. Sin embargo, en la filosofía de la restauración esta distinción se habría perdido ... la idea del arte social fue absorbida por la filosofía histórica que debía sostenerla” (Baker, 1975: 372 y siguientes).

Cuando Saint Simon aparece en escena, la idea de una disciplina acerca de lo social, estaba en el aire. Tal como destaca Iggers (1959), la idea de una ciencia de la sociedad fue considerablemente más antigua que el propio término. El mismo Saint Simon habría ensayado varios conceptos para referirse a ella: la “física de los cuerpos organizados” (en contra de los cuerpos brutos), “ciencias morales y políticas” y, particularmente, “fisiología social” y “ciencias del hombre” (433-434).

La sociología de Comte, así como las perspectivas conservadoras de Bonald y de Maistre, de las que tanto él como Saint Simon se nutrieron, compartió un diagnóstico claro acerca del problema suscitado por la revolución francesa: la destrucción de las instancias intermedias de la sociedad, la familia, las corporaciones y las asociaciones de toda índole, y la exacerbación del individuo y del Estado. Como nos recuerda Nisbet (1981): para Comte, el individualismo es la enfermedad del mundo occidental, y, por tal razón, su visión del problema básico de la Europa de entonces, no era político, sino espiritual.

Como destaca Hawthorne (2002), la salida fue entender a la sociedad europea no como mera aglomeración, sino desde el punto de vista de una “doctrina orgánica” (71). En tal sentido, no debe extrañarnos que la perspectiva de una ciencia de la sociedad se erigiera en términos de una mirada más bien estructuralista y anti voluntarista de la sociedad (Wittrock, Heilbron & Magnusson, 1998: 26). Precisamente, en una línea muy distinta a las nociones de ciencias sociales sostenidas en Francia, con anterioridad.

Saint Simon y Comte utilizaron a Condorcet en la línea de identificar una sucesión de etapas o estadios sociales. Así, el progreso quedaba comprendido en fases cada una de las cuáles expresaba sus propios problemas. En esa línea interpretativa, señala Baker (1975), la política queda supeditada a la historia. Ese es un planteamiento contrapuesto al de Condorcet, quien nunca desconoció la necesaria articulación de voluntades ilustradas para la toma de las mejores decisiones prácticas y racionales. Para ello el uso de las matemáticas y, en específico, de la teoría de las probabilidades, constituía una herramienta indispensable. “He allí la base de la tensión que en su pensamiento se erige entre “elitismo científico y el liberalismo democrático. Los intentos por resolver esta tensión, constituyen la aportación más característica de Condorcet al pensamiento político y social de la Ilustración” (Baker, 1973: 386). En cambio, para Comte, la aplicación de las matemáticas al estudio de la sociedad constituía, a la vez que un error, una impertinencia (Burns, 1959: 432; Baker, 1975; Porter, 2008: 35).

Cuando Comte re inventa el neologismo sociología, en la segunda mitad de la década de 1830, el panorama relativo a los eventuales aportes de las ciencias sociales se había ya desplazado. La ciencia de la sociedad se erige en una atenta mirada sobre los procesos sociales en curso y, aun en su progresismo, revisa con cautela -cuando no con horror- algunas de las consecuencias del proceso revolucionario. El intento de una ciencia social cuya misión y sentido era aportar a la toma de decisiones de forma racional, apoyada por los avances de las matemáticas de la época, es asociada con esas consecuencias no deseadas. Así, con esta dilución del sentido más bien práctico de las ciencias sociales, caen también los afanes reformistas que inspiraron esa reunión técnicamente fructífera entre teoría de las probabilidades y decisiones racionales, frente a problemas prácticos.

Para Comte el propósito de una ciencia de la sociedad será otro: “la revolución que caracteriza la virilidad de nuestra inteligencia consiste esencialmente en sustituir en todo, la inaccesible determinación de las causas propiamente dichas, por la simple averiguación de las leyes, o sea de las relaciones constantes que existen entre los fenómenos observados ... nosotros no podemos conocer verdaderamente que las diversas relaciones mutuas propias de su cumplimiento, sin penetrar nunca en el misterio de su producción” (Comte, 1984: 40)

Con este planteamiento, Comte se asegura de cerrar el paso a dos afanes claves asociados a las nociones de ciencias sociales de fines del siglo XVIII y comienzos del XIX: por una parte, no es posible el conocimiento de las causas de los fenómenos, sino las relaciones que se dan entre éstos. Por otra, el uso del desarrollo de las matemáticas, para instruir la toma de decisiones racionales frente a problemas prácticos inmediatos de todo orden, carece de sentido. Para Comte, el progreso se logra, sí, pero con orden, y esa no es tarea de individuos utilizando su intelecto libre y racionalmente, sino del espíritu positivo. El supuesto teleológico del progreso en la perspectiva de Comte resulta, de este modo, evidente: la agencia humana, de carácter político,

no tiene cabida frente al paulatino, pero inevitable advenimiento de la nueva era positivista.

V. REFLEXIONES FINALES: SOBRE ALGUNAS LECCIONES DEL TRÁNSITO HISTÓRICO ENTRE CIENCIAS SOCIALES Y CIENCIA DE LA SOCIEDAD, A LA LUZ DE LOS DESAFÍOS DEL PRESENTE

Las “ciencias humanas”, argumenta Foucault (1968), no podían tener existencia antes del siglo XIX. En un afán provocador, el filósofo francés sugiere que no puede haber “ciencia humana” sin que exista, primero, el “hombre”. Por ello, a su juicio, sólo pudieron aparecer “hasta que, bajo el efecto de algún racionalismo presionante, de algún problema científico no resuelto, de algún interés práctico, se decidió hacer pasar al hombre, al lado de los objetos científicos” (334 – 335). Por cierto, se trata de un asunto cuyos aspectos epistemológicos son innegables, pero que no son suficientes para explicar ese proceso. El mismo Foucault no puede dejar de reconocer las circunstancias histórico materiales en que surgen las “ciencias humanas”, cuando destaca que “también fueron necesarias, sin duda, las amenazas que después de la revolución han pesado sobre los equilibrios sociales y sobre aquello mismo que había instaurado la burguesía, para que apareciera una reflexión de tipo sociológica” (334).

Por otra parte, destaca Foucault en su análisis que: “es el retiro de la mathesis y no el avance de las matemáticas lo que permitió al hombre constituirse como objeto del saber” (340) y, en tal sentido, destaca que las matemáticas dejaron de aportar al desarrollo de las “ciencias humanas”. El problema es que Foucault integra en ese movimiento a Condorcet, y no realiza la necesaria distinción entre el planteamiento de este autor, en orden a concebir una ciencia social que iluminada por el avance de las matemáticas sirva a la toma de decisiones racionales para el beneficio de la humanidad, y las posiciones de Comte, cuya lectura de Condorcet -como hemos visto- está en la línea de establecer la aparición sucesiva de un conjunto de etapas históricas caracterizada, cada cual, por sus especificidades.

En rigor, y para nuestros efectos, Foucault se está refiriendo como “ciencias humanas”, a aquel conjunto de disciplinas que comienzan ya a tomar un cariz específico e independiente. Aquel conjunto de discursos –como adecuadamente las califica- que se han desprendido ya de esa idea de las ciencias sociales previas, indiferenciada y cuya misión era servir de base a la reforma social, nutriendo la reflexión racional en el proceso de la toma de decisiones.

Foucault culmina por cerrar su estudio sobre el saber, con una sugerente profecía: “El hombre es una invención cuya fecha reciente muestra con toda facilidad la arqueología de nuestro pensamiento. Y quizá también su próximo fin. Si esas disposiciones desaparecieran tal como aparecieron, si, por cualquier acontecimiento cuya posibilidad podemos cuando mucho presentir, pero cuya forma y promesa no conocemos por ahora, oscilaran, como lo hizo, a fines del siglo XVIII el suelo del pensamiento clásico, entonces podría apostarse a que el hombre se borraría, como en los límites del mar un rostro de arena” (375).

¿No son acaso los temores acerca de ello lo que hoy inunda por doquier los debates acerca de los impactos de los avances tecnológicos de vanguardia? ¿no será que parte de esos desarrollos representan, precisamente, lo que evidencia un cambio radical de esas disposiciones a las que se refiere Foucault?

Resulta curioso que hoy, como en los inicios, el desarrollo tecnológico de vanguardia que está sustentando el desenvolvimiento de las ciencias sociales (y de prácticamente todo lo que nos rodea) esté relacionado con la idea de probabilidad: en eso no se diferencian el aporte de las teorías matemáticas de la probabilidad que desarrolló e intentó aplicar Condorcet (entre otros pensadores de su época) a la toma de decisiones, de la probabilidad a partir de la cual funcionan los algoritmos propios de la IA generativa.

No obstante, sí se presenta una diferencia crucial: mientras la primera perspectiva de unas ciencias sociales apoyadas por la teoría de las probabilidades para la toma de decisiones

racionales, se sustentaba en un sentido profundamente humano, porque tenía a su base la certeza de un mejoramiento de la naturaleza humana en un progreso indefinido, hoy, ya no contamos con ese supuesto.

Nuevamente, las ciencias sociales requieren de un fundamento histórico para operar, para entenderse. Requieren de un esfuerzo de auto comprensión ilustrado por las humanidades, sin el cual el esfuerzo científico técnico es vano y vacío. Esta parece ser la única vía que otorga sentido y permite poner en contexto el uso de la tecnología a favor del progreso humano apoyado en la razón.

Pero esta intención debe trascender el momento propiamente técnico, pues allí, como nos lo enseñó ya hace muchos años Ortega y Gasset, no se encuentra el sentido más profundo de nuestro quehacer. Esa intención se parece más a lo que los griegos llamaron *phronesis*: esto es, a una sabia comprensión de la situación. Mientras sigamos equiparando sabiduría con conocimiento técnico (cuestión que los griegos se cuidaron mucho en diferenciar), no tendremos esperanza alguna de ilustrar y orientar nuestra acción ni como humanos, ni como científicos sociales.

El hombre, como posibilidad de agencia, está presente en el supuesto de las primeras ciencias sociales, previo a la aparición de la ciencia de la sociedad, y previo al proceso de diferenciación y especificación de cada una de las ciencias sociales, porque en ellas el foco está puesto en la transformación social racional. El apoyo del desarrollo de las matemáticas es allí, fundamental. En este punto, Foucault parece estar equivocado. Y lo hace porque el supuesto de un progreso sucesivo quedó claramente naturalizado y no requirió de mayor reflexión. Aquí la tesis de Baker es pertinente, pues de forma evidente los aportes de Comte y Saint Simon sitúan a la historia -entendida en términos evolutivos- por sobre la política: la posibilidad de la agencia no es lo central, pues sus consecuencias inesperadas pueden ser catastróficas, tal como lo evidenciaron para estos autores los días más aciagos de la revolución francesa.

Hoy el camino parece ser, en cierto sentido, el inverso, pues ya no tiene mucho sentido defender fronteras disciplinarias que se desdibujan día a día. Volvemos a una idea genérica de ciencias sociales. Su quehacer, apoyado por el desarrollo vertiginoso de las nuevas tecnologías, impulsa procesos que, en aras de una mayor eficiencia y productividad, pretenden llevar la transformación al límite de la racionalidad. Aquí, Foucault parece acertar. Y lo hace porque las huellas de lo humano, tal como lo hemos conocido, comienzan a desdibujarse. A diferencia del relativo optimismo decimonónico, no contamos hoy con el supuesto de un progreso continuo y persistente. Este debe ser siempre, ya lo sabemos, construido.

Repensar el rol de las ciencias sociales con ese horizonte en mente no es huir al refugio de un pasado en donde supuestamente todo fue mejor. Al contrario, es asumir un futuro que sea ilustrado por una tradición más amplia, enriquecida por las diferentes expresiones, universales y locales, de las ciencias y las humanidades. Quizás, allí podríamos encontrar el adecuado equilibrio entre historia y política conjurando así toda visión pesimista: única forma en que la profecía de Foucault sobre la desaparición del ser humano permanezca, para bien o para mal: incumplida.

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Situated Feminisms, Art and New Technologies: A Study of the Aesthetic- Technological Experiences of the Women's Movement in Argentina (2013-2017)

PhD. Bárbara Bilbao

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INTRODUCTION

Women have forged a dense relationship between politics and the creative intervention of public space. They've enabled new meanings and significations through diverse artistic practices aimed at denouncing violence and the conditions of women's inequality within contemporary capitalism. These experiences have not only been formulated, thought through and executed by women who self-identify as artists or communicators, but also by those who have learned to inhabit the political body in a counter- hegemonic way. What's also called into question is the conception of canonized art, which relates to social events and takes forms differentiated from the traditional: installations (with applied technology or Artificial Intelligence), performances, sound poetry, contemporary dance, video art, among others (Cippollini, 2003). The intersections of art, technology and politics are grounded in a feminist and disruptive reading of public intervention, not only as a possible stage but also in relation to bodily dissidences, images (e.g., the case of "Guerrilla Girls"), sounds and words (Oliveras, 2011). In this triad, a new problem emerges related to the invisibilization of women's marginal place in certain artistic branches.

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Women have forged a dense relationship between politics and the creative intervention of public space. They've enabled new meanings and significations through diverse artistic practices aimed at denouncing violence and the conditions of women's inequality within contemporary capitalism. These experiences have not only been formulated, thought through and executed by women who self-identify as artists or communicators, but also by those who have learned to inhabit the political body in a counter-hegemonic way. What's also called into question is the conception of canonized art, which relates to social events and takes forms differentiated from the traditional: installations (with applied technology or Artificial Intelligence), performances, sound poetry, contemporary dance, video art, among others (Cippollini, 2003). The intersections of art, technology and politics are grounded in a feminist and disruptive reading of public intervention, not only as a possible stage but also in relation to bodily dissidences, images (e.g., the case of "Guerrilla Girls"), sounds and words (Oliveras, 2011). In this triad, a new problem emerges related to the invisibilization of women's marginal place in certain artistic branches. In this new transnational identity constitution (Bidaseca, 2011), cyborg (Haraway, 1995) and framed in terms of potentiality (Butler, 2015), new conditions of possibility are established for those desiring bodies to inhabit their territories, intervene in them, produce common, egalitarian meanings and fight for

rights within the very system of inequalities. A historical genealogical journey through Argentine feminisms (Bilbao, 2017 and 2019) allows for an understanding of other dimensions of the dominant conditions over practices and knowledge linked to art, technology and communication. The so-called popular feminisms, connected to artistic practice, enter this threshold of new significations regarding the potentialities of differentiated bodies due to their class, gender or ethnicity. Understanding the potentialities of an emancipatory movement in a particular historical moment shows why it constitutes an event (Lazzarato, 2006). From this, the paradigmatic singularities of creative strategies and aesthetic configurations linked to new technologies, contributed by feminisms situated around the various historical contingencies of women, emerge. The relations between gender studies, art, and politics in Argentina have a long and intense theoretical corpus and literature problematizing specific moments in social history, establishing particular links between these fields (Giunta, 2010, 2014; Gutiérrez, 2008; Longoni, 2009, 2010; Lucena, 2016; Mouffe, 1992; Muñoz, 2009; Pollock, 2008). The porosity that exists in the convergence of aesthetics, politics and gender enables a series of differentiated narratives that allow for the reconstruction of the national historical moment—that is, those moments we will call "cultural events" in present-day Argentina. In this sense, research linked to the experiences of the sixties and seventies vanguards (Oliveras, 2011, Casullo, 2006), protests against the advance of neoliberalism (Cippollini, 2003), the crises of 2001 (Moreno, 2011, Bilbao, 2017) and new artistic practices in present-day Argentina will

promote the establishment of the corpus to be analyzed, considering various modalities of the artistic field and their relationship with new technological mediations in: visual arts, sound art, music, theater, performances, installations. The new ways of constructing gender transidentities through art become essential when developing a strategy of resistance to the system of discrimination and the possibility of constructing a historical narrative from other situated narratives. Practices linked to art in relation to gender and new technologies enable reforming a situation through denunciation and the visibility of an inequality problem and, on the other hand, enable the material possibility of inhabiting territories in a more democratic way. It's in insurrectionary action (Berardi, 2014, Didi-Huberman, 2017) where the genealogy of a space, a territory, a country, is found. The history of uprisings, the history of representations and artistic experiences of these uprisings, constitutes a way of organizing the identity of a country. Studies linked to emancipatory experiences cover a broad spectrum of research and conceptual and political contributions, fundamentally the materiality of collective experience based on the contingency in which social narratives carry political (and aesthetic) actions of this type (Kaufman, 2012). This study aims to configure a key categorical development for understanding social narratives anchored in the ways of analyzing how gender, technology, and the body (Butler, 2015, Haraway, 1995), aesthetics, and politics (Benjamin, 2015, Casullo, 2006, Oliveras, 2011) constitute a conglomerate of critical subjective knowledge and practices that aim to transcend, in terms of cultural event, the present-day Argentine context (Lazzarato, 2006, Kaufman, 2012, Bilbao, 2017). In this sense, it seeks to understand the formation process of the Ni Una Menos space (Argentina) and its organizational consolidation in 2015 (Rodríguez, 2015; Merchán and Fink, 2016, Bidaseca, 2017) and genealogically articulate it with similar experiences in Europe.

II. METHODOLOGY

A multimodal qualitative investigation is projected through an interpretive-hermeneutic

methodology applied to the analysis of artistic experiences linked to new technological mediations. This includes audiovisual and photographic documents, narratives collected from multi-situated archives (Marcus, 2001), dense description (Geertz, 2006), and artistic research (López Cano, San Cristóbal, 2014). This combination is anchored in the indexical paradigm (Ginzburg, 1999) and in feminist and artistic epistemologies (Harding, 1998; Longoni; Giunta).

The research proposes a historical and contextualized analysis of artistic and political practices of Argentine feminisms, focusing on the 2013–2017 period due to the consolidation of aesthetic-political interventions and feminist articulations. These reflect not only national dynamics but are in dialogue with situated feminisms in Latin America and Europe, which provide alternative, counter-hegemonic readings of public space and gender relations.

The project is organized into the following stages:

- Bibliographic review and state of the art.
- Reworking of conceptual and methodological frameworks.
- Selection of methodological tools and systematization of materials.
- Empirical research: interviews with activists and artists; participant observation; analysis of artistic and media materials.
- Theoretical synthesis: development of an integrative analytical model.
- Drafting of working papers and presentations of preliminary results.
- Final analysis, conclusions, and writing of final report.

Each of these stages will be conducted over approximately three months of in-person research and three additional months of remote finalization, including data analysis, refinement, and dissemination of results.

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Language Acquisition, as a Predictor of School Learning and Inclusion Variable

Dr. Mariana Dalbes

ABSTRACT

This article intends to share the concern about the school integration of children born with biological disadvantages due to their prematurity. These children born prematurely, as a result of their immaturity, suffer from a number of pathologies that require special care in neonatology units and a subsequent follow-up by an interdisciplinary team of professionals to minimize their sequelae and to fully develop their capabilities.

Compared to full-term infants, premature and low-weight babies have a number of characteristics that place them at high risk. In addition, the aim herein is to find out if they required support, if they received therapeutic assistance, if the family accompanied them throughout this process and upon reaching school age, in order to show whether they experienced difficulties in their school integration (such as difficulties in learning to read and write, for instance).

Keywords: premature baby, child development, learning difficulty, educational inclusion.

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Language Acquisition, as a Predictor of School Learning and Inclusion Variable

La Adquisición del Lenguaje, Como Predictivo de Aprendizajes Escolares y Variable de Inclusion

Dr. Mariana Dalbes

ABSTRACT

This article intends to share the concern about the school integration of children born with biological disadvantages due to their prematurity. These children born prematurely, as a result of their immaturity, suffer from a number of pathologies that require special care in neonatology units and a subsequent follow-up by an interdisciplinary team of professionals to minimize their sequelae and to fully develop their capabilities.

Compared to full-term infants, premature and low-weight babies have a number of characteristics that place them at high risk. In addition, the aim herein is to find out if they required support, if they received therapeutic assistance, if the family accompanied them throughout this process and upon reaching school age, in order to show whether they experienced difficulties in their school integration (such as difficulties in learning to read and write, for instance).

Keywords: premature baby, child development, learning difficulty, educational inclusion.

RESUMEN

El presente artículo pretende compartir la inquietud sobre la inclusión en el ámbito escolar de los niños que nacieron con desventajas desde lo biológico dada su prematurez. Estos niños que nacen prematuros, por su inmadurez, sufren una serie de patologías que requieren cuidados especiales en los servicios de neonatología y un seguimiento posterior, a cargo de un equipo interdisciplinario de profesionales, para lograr

minimizar sus secuelas y desarrollar plenamente sus capacidades.

Los bebés prematuros y de bajo peso presentan, en comparación con los nacidos a término, una serie de características que los colocan en situación de alto riesgo. Además, se trata de indagar si requirieron apoyos, si recibieron asistencia terapéutica, si la familia los acompañó en este proceso y en el arribo a la etapa escolar, para poner en evidencia si presentaron dificultades en su incorporación a la escuela (como dificultades en los aprendizajes de lectoescritura, por ejemplo).

Palabras clave: niño prematuro, desarrollo del niño, dificultad de aprendizaje, inclusión educativa.

I. INTRODUCCIÓN

El presente artículo pretende determinar el valor predictivo del lenguaje en relación con la adquisición de habilidades posteriores de aprendizaje, particularmente en lectura, a la vez que los mismos, serán los índices de la inclusión educativa.

A partir de mi Tesis Doctoral en desarrollo, referida al Relevamiento del Desarrollo de los Niños Recien Nacidos Prematuros de Alto Riesgo, Durante el año 2022, 2023 Y 2024, en la Clínica Universitaria Reina Fabiola, y la Adquisición del Lenguaje como Variable de Inclusion; es que surge la inquietud de indagar sobre el Lenguaje, como variable predictiva, de los aprendizajes escolares como lectura y escritura en donde se asientan todos los demás aprendizajes académicos y serán la variable de inclusión, en la Educación del niño.

Todos conocemos la injerencia de factores neurocognitivos en el desarrollo del lenguaje, esto garantiza que los mecanismos estén preparados para la decodificación de sonidos, que formaran junto a sus significantes, elementos prioritarios, como también el contexto que influye esencialmente en el desarrollo, de este medio de comunicación.

Durante el desarrollo y desde el nacimiento, así como la madre organiza la aparición gradual de la realidad en el psiquismo del bebé, la familia administra la transición entre el mundo íntimo y cercano, a la realidad social circundante. Permite una gradual permeabilización de los vínculos con el entorno, a través de la incorporación de los miembros de la familia ampliada: abuelos, tíos, primos. El lenguaje surge como necesidad de comunicación, para poder expresar nuestras necesidades básicas primarias, como alimento y cuidado, para después expresar sentimientos y pensamientos y poco a poco, mediante el pensamiento abstracto, expresar nuestras ideas y poner en juego toda la capacidad creativa y cognitiva al servicio de la comunicación.

Múltiples factores, incluido el grado de prematuridad, la morbilidad neonatal, el peso de nacimiento, la gravedad de la enfermedad, el estado auditivo, el entorno lingüístico en la unidad de cuidados intensivos neonatales y en el hogar, el nivel de educación materna, el estado social y ambiental de la familia y el acceso a la intervención temprana, contribuyen a los resultados del lenguaje de bebés extremadamente prematuros.

Del mismo modo, podemos decir que el lenguaje surge como necesidad de comunicación y expresión de deseos y necesidades, por lo que si nuestro interlocutor nos decodifica en gestos y no posibilita el espacio de expresión por anticiparse, el desarrollo de lenguaje quedara afectado.

La elaboración del discurso se desarrolla aún más en la enseñanza inicial y depende en gran medida de las competencias de comprensión y de expresión escritas. Tal como lo expresa Abadi, en sus escritos:

“Las relaciones entre el desarrollo del lenguaje oral y el del lenguaje escrito son estrechas y complejas. Algunos aspectos lingüísticos, como la consciencia fonológica, predicen el desarrollo del desciframiento y de la ortografía fonética. La comprensión del lenguaje escrito depende de otras competencias en lenguaje oral, en particular de los conocimientos de vocabulario y del nivel de comprensión oral. el ingreso a la escolaridad y a las actividades sociales y culturales, amplian el mundo del niño, que se encuentra a la vez protegido del exceso de estímulos externos y acompañado en su exploración del mundo e inserción en la sociedad.”. (Abadi, Sonia. 1996).

Ella le otorga al lenguaje oral, el poder de ser en la construcción del lenguaje escrito, su principal base, desde donde se construye la escritura, no como acción o praxia, sino como decodificador de sentidos y simbolismos.

La palabra, dice Luria, "multiplica el ambiente referencial del individuo y rompe el binomio experiencia-conocimiento". El lenguaje se convierte, además, en un instrumento de comunicación, en un transmisor de experiencias propias y ajenas, por lo que el ser humano adquiere una nueva dimensión de su conciencia, que le permite formar imágenes subjetivas del mundo objetivo. Desarrolla la capacidad de abstracción y, por consiguiente, del pensamiento, al tiempo que crea códigos de acceso a las cosmovisiones, a las interpretaciones. Luria A. R. (1980). El citado autor, le agrega elementos nuevos y lo abre al conocimiento ampliado.

“En el seno del fenómeno total que representa el lenguaje, hay dos factores: la lengua y el habla”. La “lengua” es el conjunto de los elementos que conforman el medio de comunicación de una sociedad dada, dinámica y cambiante. El “habla” es un fenómeno particular e individual de los individuos, ligado más bien a la experiencia de cada uno y a aspectos personales y sociales. F. Saussure.

El lenguaje se desarrolla como parte de un gran sistema de representación. Es solamente una forma de representar el mundo”. Jean Piaget “Un complejo sistema de códigos que designan

objetos, características, acciones o relaciones, códigos que tienen la función de codificar, transmitir la información e introducirla en determinados sistemas.” A. Luria

“El acto lingüístico se inicia en un plano profundo en el que intervienen la motivación, la sensorpercepción y las emociones”. L.Vigotsky

El pensamiento lingüístico de Noam Chomsky, refiere ser un sistema de conocimiento innato. Capacidad innovadora con la que es capaz de formular nuevas expresiones, que ponen de manifiesto nuevos pensamientos.

En el Desarrollo del lenguaje oral, el habla y el lenguaje constan de tres componentes: la forma, el contenido y el uso. El habla se compone de la articulación (conjunto de los movimientos buco-linguo-faríngeos que permiten la producción de los sonidos de forma aislada) y la fonología (capacidades de producir las secuencias de sonidos en el interior de las palabras). El lenguaje consta de los aspectos léxicos (vocabulario) y sintácticos (organización de las frases según las reglas gramaticales de la lengua)

El lenguaje es un medio de pensamiento debido a que, el desarrollo del mismo interviene directamente en los procesos de aprendizaje. Desde los años más tempranos comenzando con el Nivel Inicial y a través de la vida, es importante para el sujeto tener oportunidades para expresar lo que sabe.

El lenguaje oral es la herramienta esencial de la comunicación y su papel es indispensable para los aprendizajes escolares, así como para el futuro social.

Para la mayoría de los niños, estas adquisiciones se logran de forma casi natural. La adquisición del lenguaje en la infancia se concibe como una interacción entre el entorno psicoafectivo y sociocultural por una parte y los mecanismos biológicos que sustentan las diferentes competencias lingüísticas y cognitivas por otra.

Las deficiencias del habla y el lenguaje, de funciones del lenguaje tanto simples como complejas son comunes entre los ex bebés

prematuros. Los servicios de detección temprana, diagnóstico temprano e intervención temprana, son necesarios para optimizar los resultados del lenguaje de los bebés prematuros. Cada vez hay más pruebas del potencial para mejorar las habilidades lingüísticas a medida que aumenta la edad de los lactantes prematuros extremos.

Estas alteraciones están asociadas con alteraciones del lenguaje con efectos duraderos en la infancia y la adolescencia y mayores necesidades de logopedia y apoyo educativo. Se suman los efectos de la permanencia frente a las pantallas a edades muy tempranas, que ya están causando efectos negativos en el desarrollo del lenguaje y la comunicación.

En los resultados parciales obtenidos del análisis de las variables, se destacan como factor de incidencia fundamental, el peso de nacimiento en el niño prematuro y obviamente la edad gestacional, lo que nos hace pensar en que debemos acompañar y orientar al grupo familiar, para recorrer este camino nuevo que emprenden en el desarrollo de un hijo prematuro.

El aprendizaje se gesta en la comunicación verbal entre las personas, a partir del entramado de encuentros que acontecen entre ellos, a partir del uso del lenguaje puesto a disposición para construir lazos con otros, con la comunidad, con la cultura y conocer, así, más acerca del mundo. De este modo, se promueve el desarrollo de las aptitudes humanas pudiéndose advertir que todos los aprendizajes son producto de prácticas sociales internalizadas siendo el lenguaje la herramienta mediatizadora por excelencia.

Por otra parte, el lenguaje es un sistema de simbolización imprescindible para el logro de la alfabetización, en tanto la adquisición lingüística se encuentra en estrecha relación con la apropiación de la lectoescritura. Ambos se presentan como dos sistemas de representación distintos y el niño debe ser capaz de advertir esas diferencias para reflexionar acerca del lenguaje, para distinguir el funcionamiento y las leyes que rigen en cada uno de ellos.

De esta manera, el proceso de alfabetización continúa complejizándose y el desarrollo del

lenguaje acompaña al niño en ese sinuoso camino, que le permitirá convertirse en lector y escritor.

Por otro lado, el desarrollo del pensamiento se encuentra en íntima relación con el lenguaje; en tanto que el crecimiento intelectual del niño depende del dominio de los medios sociales, de las herramientas simbólicas que mediatizan el encuentro del sujeto con el mundo y el conocimiento acerca del mismo. En otras palabras, el lenguaje no sólo le permite al pensamiento su expresión sino que allí encuentra su realidad y su forma.

El desarrollo lingüístico del niño tiene absoluta implicancia en los distintos aprendizajes propuestos por la escuela, aquellos relativos a las operaciones matemáticas y demás contenidos correspondientes a otras áreas curriculares tales como las ciencias sociales y naturales. Puesto que para acceder a ciertos conceptos más abstractos, es imprescindible que el lenguaje evolucione, que se eleve a su mayor grado de abstracción, que alcance niveles de orden racional y categorial para dar forma al pensamiento. De manera que, el niño pueda apropiarse de nuevos y más complejos conocimientos.

Además, el lenguaje opera como ordenador de la conducta, la atención y la memoria. En este sentido, es el discurso del adulto el que organiza el comportamiento del niño pequeño y su capacidad de atender hasta tanto sea su propio lenguaje interior el que cumpla dicha función. De esta manera, el lenguaje interviene en otros procesos necesarios para el aprendizaje escolar; en tanto que el niño debe atender, recordar y dar cuenta de sus conocimientos a través del uso de la palabra apropiándose, así, de nuevos saberes.

Así, el lenguaje se presenta como la herramienta mediatizadora privilegiada en el proceso de aprendizaje escolar. No sólo porque es un sistema simbólico complejo y singular sino porque le permite al niño constituirse como sujeto hablante y pensante; determinando así su devenir y sus aprendizajes.

El lenguaje de los niños fuera de la escuela funciona porque lo usan cuando quieren decir o comprender algo. En cambio, el lenguaje que se

utiliza en el aula por parte de los alumnos y maestros deben ser apropiados en este contexto. El enfoque no está en el lenguaje, sino en los significados que comunica. Aprendemos de él al mismo tiempo que lo desarrollamos. No aprendemos a leer por leer signos, aprendemos a leer por leer lecturas, paquetes, historias, revistas, periódicos, guías de televisión, carteleras, etcétera.

Las escuelas deberían formar tomando como base el desarrollo del lenguaje que los chicos han alcanzado antes de comenzar la escuela.

Teniendo en cuenta quiénes son, de dónde vienen, cómo hablan, cómo escriben y qué experiencias han tenido antes de llegar a la escuela. De esta manera no hay niños en desventaja en lo que a la escuela concierne.

El lenguaje interno es el responsable de diversas funciones cognitivas superiores, pues transforma la percepción del sujeto, transforma su memoria, y permite la planificación y regulación de la acción, haciendo posible la actividad voluntaria. Nuestro pensamiento está ahora plenamente verbalizado, facilitando el control y regulación de los propios procesos cognitivos, con lo que nuestras acciones, consecutivas a nuestro pensamiento, estarán mejor guiadas y estructuradas.

Es el medio por el cual aprendemos todos los conceptos abstractos (la individualidad, el tiempo, el espacio, condición social, la negación, religión, arte, etc.) que nuestra sociedad haya podido ir creando a lo largo de su desarrollo.

Cada niño, en su crecimiento y desarrollo particular, va a ir estructurando su mente con todas las abstracciones que la sociedad ha originado. Por lo tanto, al ir asimilando las abstracciones que aprende por medio del lenguaje que escucha de la sociedad en la que vive, dentro de su periodo crítico de maduración neurológica, organiza su sistema nervioso en función de las cualidades que tales abstracciones le ofrecen.

Por tanto, en el desarrollo del niño, el lenguaje y el pensamiento parecen ser independientes en su

origen, produciéndose posteriormente continuas interacciones.

De lo anteriormente expuesto, podemos concluir que el desarrollo del lenguaje, es fundamental como basamento del pensamiento y de los aprendizajes escolares. La posibilidad de expresar el pensamiento y comunicar a otros, así también como retroalimentarse del pensamiento del otro, nos confirma que el aprendizaje y el debate, utilizados como herramienta; construyen pensamiento que se comparten y difunden, lo que genera cultura y crecimiento.

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Counterterrorism without Borders: U.S.–Uzbekistan Cooperation in the Global Security Framework

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ABSTRACT

In the context of evolving global security challenges, U.S.–Uzbekistan cooperation in counterterrorism has become a key element of regional stability in Central Asia. Rooted in mutual interests and reinforced by geopolitical realities, the partnership focuses on combating transnational threats such as terrorism, extremism, narcotics trafficking, and human smuggling. Uzbekistan has supported U.S. regional initiatives, including military logistics assistance, capacity-building in border control, and multilateral coordination mechanisms. According to U.S. Department of State reports, Uzbekistan remains a committed partner in the Global Coalition to Defeat ISIS and has strengthened domestic counter-extremism policies. High-level engagements, such as the inaugural C5+1 dialogue and U.S.–Uzbekistan Strategic Partnership Dialogue, reflect a sustained deepening of strategic alignment between the two countries. Senior-level talks, such as the recent Tashkent meetings (January 2025), point to heightened strategic convergence between the two nations. This paper examines how bilateral programs cross boundaries, placing Uzbekistan within the global counterterrorism cooperation architecture, and putting it as a leading player in post-9/11 regional security diplomacy.

Keywords: uzbekistan, united states, security cooperation, central asia, counter terrorism, regional stability.

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In the context of evolving global security challenges, U.S.–Uzbekistan cooperation in counterterrorism has become a key element of regional stability in Central Asia. Rooted in mutual interests and reinforced by geopolitical realities, the partnership focuses on combating transnational threats such as terrorism, extremism, narcotics trafficking, and human smuggling. Uzbekistan has supported U.S. regional initiatives, including military logistics assistance, capacity-building in border control, and multilateral coordination mechanisms. According to U.S. Department of State reports, Uzbekistan remains a committed partner in the Global Coalition to Defeat ISIS and has strengthened domestic counter-extremism policies. High-level engagements, such as the inaugural C5+1 dialogue and U.S.–Uzbekistan Strategic Partnership Dialogue, reflect a sustained deepening of strategic alignment between the two countries. Senior-level talks, such as the recent Tashkent meetings (January 2025), point to heightened strategic convergence between the two nations. This paper examines how bilateral programs cross boundaries, placing Uzbekistan within the global counterterrorism cooperation architecture, and putting it as a leading player in post-9/11 regional security diplomacy.

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I. INTRODUCTION

The war on terror has reshaped world security relations since the September 11 attacks. Central

Asia, hitherto a peripheral region in American foreign policy, became increasingly important as a strategic buffer zone, particularly because of its geographical location close to Afghanistan. Within the Central Asian states, Uzbekistan was an essential partner in counterterrorism and regional stabilisation. This article discusses the development, extent, and future direction of U.S.–Uzbekistan counterterrorism cooperation within global security.

The 2018 visit of President Shavkat Mirziyoyev to the White House, hosted by President Donald J. Trump, marked a pivotal moment in U.S.–Uzbekistan relations, signaling the commencement of a new era of strategic partnership between the two nations. Both President Trump and President Mirziyoyev condemned cowardly terrorist attacks against Afghanistan security forces and innocent civilians, and committed to expanding dialogue to overcome the challenges facing Afghanistan. President Mirziyoyev pledged steadfast political support to the Government of Afghanistan and discussed the December 2017 visit of Afghanistan President Ashraf Ghani to Tashkent, Uzbekistan, where the two leaders signed a series of landmark agreements to increase trade and develop critical infrastructure. President Trump recognized the important role that Uzbekistan plays in regional economic development and praised Uzbekistan's efforts to expand the development of trade and commercial ties with Afghanistan. He offered political support and planning consultations regarding Uzbekistan's railroad and infrastructure projects in Afghanistan. In addition, Donald Trump acknowledged the United States' long-standing partnership with Uzbekistan in the fight against

terrorism. He emphasized that, following the tragic events of September 11, 2001, Uzbekistan provided the U.S. with critical logistical support and assisted in driving Al-Qaeda terrorists out of Afghanistan. During the visit, President Shavkat Mirziyoyev confirmed his full support for the U.S. President's South Asia strategy. The discussions included strengthening bilateral cooperation, sharing responsibility and addressing regional security challenges—particularly Uzbekistan's initiatives aimed at ensuring stability in Afghanistan.

The two leaders condemned extremism and international terrorism, and vowed to strengthen cooperation against these common threats. They also committed to pursue agreements that will enhance interoperability and improve regional security and noted the importance of strengthening the defense relationship by implementing the first-ever Five-Year Plan of Military Cooperation.

Following 9/11, Uzbekistan granted the U.S. access to the Karshi-Khanabad (K2) airbase, which facilitated military logistics in the Afghan war. The move was a reflection of Uzbekistan's intentions to join the international security arena. Bilateral relations intensified through collaborative exercises, border security assistance and intelligence cooperation. The U.S. Department of State has always highlighted Uzbekistan's role in countering violent extremism and cross-border threats. As a member of the global coalition to defeat ISIS, Uzbekistan has accepted legislative reform and hosted regional counter-radicalization conferences.

Moreover, U.S.–Uzbekistan signed a Acquisition and Cross-Servicing Agreement in 2016. For over a decade, several Central Asian countries have enabled U.S. logistical support for operations in Afghanistan through multiple transit agreements. The United States has \$79 million in open government-to-government sales cases with the Central Asian states under the Foreign Military Sales (FMS) system. Uzbekistan is purchasing equipment, valued at \$40 million, for its armed forces through a combination of national funds and Foreign Military Financing (FMF).

U.S.–Uzbekistan security cooperation extends beyond traditional military cooperation. Cooperative work targets the intersection of terrorism, drug trafficking and organized crime. Triangular cooperation with Afghanistan, such as anti-drug activity and intelligence sharing, reinforces Uzbekistan's role as a regional security facilitator. Trilateral meetings among Uzbekistan, the U.S., and Afghanistan during a 2020 gave priority to coordination in counter-narcotics and border security.

Recognizing that counterterrorism is not exclusively a military effort, the United States has supported Uzbekistan's initiatives on capacity building for law enforcement, education, and civil society. US-supported programs focus on countering violent extremism (CVE), police development and community resilience building. Uzbek authorities have initiated religious tolerance classes, enabled through international actors, to challenge extremist narratives. These initiatives are aligned with Uzbekistan's internal modernization program and human rights commitments.

II. STRATEGIC DIALOGUES AND INSTITUTIONAL MECHANISMS

Institutionalized the relationship by means of high-level political consultations between Washington and Tashkent. The Strategic Partnership Dialogue, revived in recent years, is an annual platform for deliberation on defense, governance and education. Recognizing the serious threats posed by international terrorism, violent extremism, trafficking in persons and transnational crime to both Uzbekistan and the United States, the two sides encouraged closer cooperation and increased exchanges to promote regional security. As stated in the U.S. State Department report of 2022, the relationship is "evolving from transactional to strategic" with increased emphasis on multilateralism and sustainable development. Security assistance includes training, equipment and policy advisory mechanisms.

Additionally, both sides noted the necessity of meeting obligations and provisions under UN

Security Council Resolution 2396 to counter terrorist travel. The United States announced it intends to provide over \$9 million in assistance this year to combat transnational organized crime and promote rule-of-law and anti-corruption initiatives. Both sides reaffirmed their commitment to a peaceful resolution to the conflict in Afghanistan and discussed concrete steps to promote a meaningful reconciliation process. Uzbekistan emphasized its ongoing efforts to enhance economic, trade, educational, and cultural ties with Afghanistan and increase its connectivity with Central Asia, and both sides reaffirmed their support for outcomes from the May 27, 2020, U.S.-Afghanistan-Uzbekistan Trilateral Meeting and subsequent working groups. The United States and Uzbekistan also reaffirmed their shared interest in advancing multilateral cooperation throughout the region, including through the C5+1 framework.

III. U.S. POLICY ON AFGHANISTAN AFTER THE RETURN OF THE TALIBAN TO POWER: COUNTERTERRORISM PARTNERSHIP WITH UZBEKISTAN

The first phase or approach was marked by the continuation of the fight against international terrorism, albeit outside the framework of direct military presence in the country. The Biden administration announced the end of the war in Afghanistan, yet counterterrorism operations persisted. A notable example of this approach was the 2022 elimination of al-Qaeda leader Ayman al-Zawahiri on Afghan soil. Thus, Afghanistan's relevance in the U.S. foreign policy agenda was predominantly defined through the prism of counterterrorism.

In the process of re-establishing U.S.-Afghanistan relations, Uzbekistan can serve as a platform for mediation. Undoubtedly, following numerous accusations against the Taliban, the United States cannot fully restore ties with the movement. This process will require time, mediation, and multilateral formats. In this context, the format of U.S.-Uzbekistan cooperation may gain increased significance.

- Firstly, the United States and Uzbekistan are strategic partners.
- Secondly, both countries have prior experience cooperating on Afghan issues. During the U.S. military presence in Afghanistan, Uzbekistan provided an airbase. When American forces withdrew, the U.S. left behind part of its military equipment – specifically, 22 airplanes and 24 helicopters, most of which are still located in Uzbekistan, reflecting a level of trust between the two sides.
- Thirdly, when the Trump administration demanded the return of U.S. military equipment from the Taliban and was met with refusal, Uzbekistan handed over seven Black Hawk helicopters that had been left on its territory. In doing so, Uzbekistan assisted the Trump administration in demonstrating to its electorate that the repatriation of U.S. military assets from Afghanistan was underway, thereby helping to preserve its political reputation.
- Fourthly, Uzbekistan and the United States share similar views on Afghanistan. Both nations regard it as part of Central Asia and link security and stability to prospects for economic development. This commitment was reaffirmed by the President of Uzbekistan at the first “Central Asia – European Union” summit held in April 2025, where he emphasized the need for Afghanistan's active participation in major economic initiatives.
- Fifthly, Uzbekistan is currently one of Afghanistan's two closest partners, along with China. This diplomatic advantage could be valuable for the United States in the context of the Afghan issue.

Thus, Uzbekistan stands out as one of the United States' potential partners in restoring ties with Afghanistan. Tashkent's position is grounded in the necessity of a coordinated international approach to Afghanistan. In this regard, Uzbekistan would welcome Washington's initiatives related to this country.

Uzbekistan continued its active role in the C5+1 regional CVE and FTF framework through virtual and hybrid CVE, repatriation, and R&R meetings

and workshops; through online youth resilience building; and through community leader and R&R care provider training.

International and Regional Cooperation: Uzbekistan's multilateral CT/CVE engagements included the following (with organizer in parentheses):

- The ministerial conference on developing a Joint Plan of Action for the implementation of the Global Counterterrorism Strategy in Central Asia (GOU, UN)
- The Counterterrorism cooperation roadmap (UNOCT)
- Third-country nationals returned from Syria and Iraq project (UNOCT, the UN Counterterrorism Center, UNICEF)
- The assessment, training plan, and conference on gender-sensitive approaches to the R&R of FTFs and their family members (the United Nations Entity for Gender Equality and the Empowerment of Women, UNODC, UNICEF)
- The Strategic Concept Workshop (NATO)
- The Cross-Border and Cross-Sector Dialogue for Tolerance and Peace in Central Asia project (UNOCT, EU)
- The Countering Trafficking of Afghan Narcotics and Synthetic Drugs in Uzbekistan through the Establishment of Interagency Mobile Teams project (UNODC)
- Law Enforcement in Central Asia and Border Management in Central Asia programs (EU)
- The Enhancing Border Management and Security in Response to Terrorism Threats in Central Asia program (UNODC)
- The 17th Conference of the Central Asian Border Management Initiative (UNODC, OSCE)
- The 36th EAG Plenary Meeting (GOU, EAG)
- The Legalization of the Proceeds of Criminal Activities and Financing of Terrorism international conference (EAG, OSCE)

Within the framework of the Shanghai Cooperation Organization's Regional Anti-Terrorist Structure (RATS), Uzbekistan has actively participated in regional counterterrorism initiatives, including the "Manesar-Antiterror 2022" joint exercise organized by India's National

Security Guard. Uzbekistan established a joint security commission with Iran to counter terrorism, "extremism," and other transnational organized crimes. It also joined the first Central Asia-India Meeting of Secretaries of Security Councils. Uzbekistani law enforcement cooperates on terrorism detection and investigation with foreign countries.

U.S.–Uzbekistan counterterrorism partnership is an instance of a developing bilateral relationship in accordance with shared strategic interests and shared security concerns. From airbase logistics assistance to collective counter-extremism operations, the partnership has adjusted to meet new geopolitics. As threats persist in crossing borders, Uzbekistan's proactive engagement in international counterterrorism efforts illustrates its new status as an actor in regional security. Increased cooperation offers both countries a strategic advantage in addressing future challenges within the global security architecture.

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