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ADULT TEACHERS' SELF-ASSESSMENT OF THEIR EMOTIONS IN ONLINE TEACHING IN SELECTED EUROPEAN COUNTRIES

ANDREAS AHRENS
Hochschule Wismar University of Applied Sciences: Technology, Business and Design, Germany
JELENA ZASCERINSKA
Centre for Education and Innovation Research, Latvia
DARIA FILIMONOVA
Babel Idiomas, Spain
ANASTASIJA BIKOVA
Centre for Education and Innovation Research, Latvia
MIHAILS ZASCERINSKIS
Centre for Education and Innovation Research, Latvia

Abstract

Due to the two identified problems (the lack of studies focused on emotions' assessment, and the lack of modern innovative online tools for emotions' measurement), there are two aims in the present research: 1. To fill in the lacuna in teachers' self-assessment of their emotions, and 2. To evaluate the modern innovative online tool "Self-Assessment Quiz" for measurement of adult teachers' self-assessment of their emotion in online teaching. Exploratory research methodology was employed. Data were collected in February-June 2023 in five European countries (Italy, Greece, Spain, Germany and Ireland). Percentage and ranking were used as the methods for data processing. The conclusion is that teachers' self-assessment of their emotions as well as the modern innovative online tool "Self-Assessment Quiz" are linked. The positive evaluation of emotions in online teaching by respondents from the selected European countries prevails. Teachers' emotions in the categories "Communication" and "Adaptability" have to be trained. The online tool "Self-Assessment Quiz" piloted in six languages (English, Italian, Greek, Spanish, German, and Irish) performs in the desired manner with enough fidelity to meet the analysis objectives. The new research question is put forward: What is an online tool for the assessment of adult learners' emotion in online classes?

Keywords: adult education, emotion self-assessment, online teaching, online tool, teachers.

INTRODUCTION

Research topicality and problem. The role of emotions in education is changing from a factor that impacts the educational process to a skill and learning outcome (Zascerinska, 2023). Together with this paradigm shift, the interest of scientific community to the analysis of emotions in education is increasing. Previously published research has addressed

- The exploration of teachers' emotions (Keller, Frenze, Goetz, Pekrun, & Hensley, 2014),
- Students' achievement emotions and online learning in teacher education (Stephan, Markusm & Gläser-Zikuda, 2019),
- Teacher's emotions and self-efficacy (Burić, Slišković, & Sorić 2020),
- Self-assessing educator social and emotional competencies and instruction (Yoder, 2022).

Different aspects of teachers' emotions such achievement emotions and emotional competencies were investigated. However, self-assessment of teachers' emotions in online teaching has not received appropriate attention from the researchers. Therefore, the gap between teachers' emotions in online teaching and their assessment has to be bridged (Steinberg, 2008).

Another issue related to the emotions' self-assessment in adult education is the lack of modern innovative online tools. The existing tools are different kind of tests, e.g. Saranya, & Guduru, 2022; Ahmad Termidi, & Jumaat, 2022. The existing test are not online tools. In order to solve this issue, Self-Assessment Quiz (EDL, 2022) has been developed within the project "Emotional Distance Learning. Emotional management to support the social and individual challenges of distance learning".

The aim of the research. Based on the two identified problems, namely the lack of studies focused on emotions' assessment, on the one hand, and, on the other hand, the lack of modern innovative online tools for emotions' measurement, there are two aims in the present research:

- To fill in the lacuna in teachers' self-assessment of their emotions, and
- To evaluate the modern innovative online tool, namely Self-Assessment Quiz, for measurement of adult teachers' self-assessment of their emotion in online teaching in selected European countries.

The research methodology. The method of data collection was online survey questionnaire. The data were collected in the selected European Countries, namely Italy, Greece, Spain, Germany and Ireland. The criterion for selecting these European countries was the implementation of the pilot programme due to the participation of these European countries, namely Italy, Greece, Spain, Germany and Ireland, in the Erasmus+ Project "Emotional Distance Learning. Emotional management to support the social and individual challenges of distance learning". For data analysis, descriptive statistics, namely percentage and ranking, was used. Respondents from Germany, Greece, Ireland, Italy, and Spain took part in the study in February-June 2023.

The research results. Teachers' self-assessment of their emotions as well as the modern innovative online tool "Self-Assessment Quiz", used for measurement of adult teachers' self-assessment of their emotion in online teaching in selected European countries, are linked. The positive evaluation of emotions in online teaching by respondents from the selected European countries, namely Italy, Greece, Spain, Germany and Ireland, prevails. Teachers' emotions in the categories "Communication" and "Adaptability" have to be trained. Piloting of the online tool "Self-Assessment Quiz" in six languages, namely English, Italian, Greek, Spanish, German, and Irish, shows that the online tool performs in the desired manner with enough fidelity to meet the analysis objectives.

Originality/Value of the article. The article value lies in two dimensions as the article

- fills in the lacuna in studies of teachers' self-assessment of their emotions in online teaching, and
- presents the evaluation of the modern innovative online tool "Self-Assessment Quiz" for measurement of adult teachers' emotions in online teaching.

The present research is different from the existing works by linking teachers' emotions in online teaching and the modern innovative online tool "Self-Assessment Quiz".

The novelty of the research is revealed by

- the analysis of teachers' self-assessment of their emotions in online teaching, and
- the evaluation of the modern innovative online tool "Self-Assessment Quiz" for measurement of teachers' self-assessment of their emotion in online teaching.

The research originality can be found in the use of 12 menaces for building the modern innovative online tool "Self-Assessment Quiz" to measure teachers' emotions in online teaching. Due to the shift in teaching to the online format, the existing research works do not offer any online tools for the self-assessment of teachers' emotions in online teaching.

The new research question is put forward: What is an online tool for the assessment of adult learners' emotions in online classes? Consequently, further research could highlight adult learners' emotions in online classes. Also, it would be interesting to compare teachers' and learners' emotion in online classes.

RESEARCH METHODOLOGY

The design of the research methodology was started with the understanding that the two phenomena, namely teachers' self-assessment of their emotions as well as the modern innovative online tool, namely Self-Assessment Quiz, used for measurement of adult teachers' self-assessment of their emotion in online teaching in selected European countries, in our research are linked.

For gaining the understanding on the development of Self-assessment Quiz as a novel online tool for teachers' self-assessment of their emotions, the exploratory research was applied in this work. The choice of the selection of the exploratory methodology was supported by assumption that the exploratory methodology does not prescribe a framework to follow (Ahrens, Foerster, Zaščerinska, & Wasser, 2020). The focus of the exploratory research is on evaluation and/or analysis of data, not on creating new designs or models (Edgar, & Manz, 2017). The leverage of the exploratory research in this work pursued two aims:

- To analyze adult teachers' self-assessment of their emotion in online teaching in selected European countries, and
- To evaluate the created modern innovative online tool Self-Assessment Quiz.

Evaluation of the modern innovative online tool Self-Assessment Quiz is vital to ascertain the credibility of this online tool (Martis, 2006). Evaluation of the Self-Assessment Quiz means to demonstrate that this online tool reproduces the intended behaviour with enough fidelity to satisfy analysis objectives (Govindarajan, 2014). Evaluation of the Self-Assessment Quiz will focus on output values (Govindarajan, 2014). For this, measurements of adult teachers' emotions in online teaching in selected European countries with the help of the Self-Assessment Quiz will be carried out (Govindarajan, 2014).

The use of the exploratory research allows for formulating new research questions (Ahrens & Zascerinska, 2021).

The exploratory research was organised in three phases:

- Phase 1 Preparation of the online tool "Self-Assessment Quiz",
- Phase 2 Piloting the online tool "Self-Assessment Quiz" and data collection, and
- Phase 3 Data processing and interpretation.

Data were collected between February 2023 and June 2023. Respondents from Germany, Greece, Ireland, Italy, and Spain took part in the piloting the online tool "Self-Assessment Quiz". Table 1 shows the participation of the respondents in the "Self-Assessment Quiz" in accordance with

- Their language they used, and
- the "Self-Assessment Quiz" categories, namely
    - Management,
    - Communication, and
    - Adaptability.

1 table. Respondents' description

Language	Management	Communication	Adaptability
English	89	39	36
Italian	32	17	19
Greek	33	27	26
Spanish	15	14	17
German	23	20	18
Irish	2	2	2

TOTAL:	194	119	118

Source: EDL, 2022

It should be pointed that the very low number of Irish language respondents in this study is due to the generally low number of Irish language speakers in the country. There are in fact more Irish speakers living outside of the Gaeltacht (Irish-speaking areas) than within. (O'Rourke & Walsh, 2020).

Another issue was the prevalence of use of English version of the online tool "Self-Assessment Quiz". That could be explained by the diverse nationalities of the users from the participating countries in this study. It spells out the reason that many participants from different countries completed the self-assessment questionnaire in English.

The collected data were processed, analysed and interpreted. For data analysis, descriptive statistics, namely percentage and ranking, was used.

Percentage is used for the comparison reasons. In this study, the comparison of replies will be carried out. The analysis will focus on the comparison of the replies

- between the levels of the 4 points Likert scale used in this study as well as
- between the languages' users of this study.

It will help understand the quality and value of each of the category, namely management, communication, and adaptability.

Hence, percentage in this study is used for the analysis of adult teachers' self-assessment of their emotion in online teaching in selected European countries.

Another method of data analysis will be ranking. Ranking is conventionally leveraged for the analysis of quality and productivity (Gonçalves & Calderón, 2017). Ranking refers to a course evaluation used for the advancement of the evaluated course (Ahrens& Zascerinska, 2020). Another application of ranking deals with making a choice from a number of options or candidates (Tofallis, 2014, p. 118). By ranking, the act of summing up one's judgment of a performance or person into a single, holistic number or score is meant (Elbow, 1994). Ranking tends to emphasize vertical differences between the options or candidates (Marginson & van der Wende, 2007). At the same time, they obscure horizontal differences, differences of purpose and type (Marginson & van der Wende, 2007).

In our work, we summed up two values, namely percentage, in each positive statement and in each negative statements, received from the "Self-Assessment Quiz", for example, used in German language. For positive statements, we summed up the levels "Agree" and "Strongly Agree", while for the negative statements we used the levels "Strongly Disagree" and "Disagree". The choice of these levels was determined by the fact that these levels represented a higher level or positive values of a category in each language version of the "Self-Assessment Quiz". The received number in the positive statement and in the negative statement was summed up. And the obtained number was divided by two as we had two values, namely a positive statement and a negative statement. The calculated number showed a ranking of the "Self-Assessment Quiz", for example, used in German language. Later, the number related to German language was compared with the numbers in other languages. The lower was the number, the higher ranking this number received. The higher was the number, the lower ranking was estimated.

Thus, ranking is applied for the evaluation of the created modern innovative online tool Self-Assessment Quiz.

Summarising content analysis was leveraged to outline the important findings of the study (Ahrens, Zascerinska, Bhati, Zascerinskis, & Aleksejeva, 2021).

Pedagogical interpretation was applied for drawing the findings of this study. It means that only the data that are of pedagogical interest were processed and analysed (Zascerinska, Emet, Usca, & Bikova, 2023). Interpretations were made by the researchers who carried out the study (Ahrens, Purvinis, Zaščerinska, Micevičienė, Tautkus, 2018).

RESEARCH RESULTS AND DATA ANALYSIS

This part of the article is divided into three parts:

- Description of the preparation of the online tool "Self-Assessment Quiz",
- Data analysis, and
- Findings of the study and Discussion.

Preparation of the online tool "Self-Assessment Quiz"

The development of Self-assessment Quiz was started with literature review (Ahrens, Zascerinska, Macovei, Zascerinskis, & Aleksejeva, 2022). The literature analysis facilitated the identification of 12 menaces as shown in Table 2.

2 table. Categories and relevant emotional menaces

Nr.	Menace title
1.	Technical problems: poor Internet connection, lack of digital tools, software
2.	Lack of non-verbal and paraverbal communication
3.	Adaptation of activities and materials to online teaching
4.	Difficulty in creating a good rapport and interaction with students
5.	Difficulty in keeping students motivated and engaged online
6.	Emotional distance
7.	Students' fatigue
8.	Poor time management
9.	Feelings of fear toward change and new scenarios (adaptability)
10.	Group activities
11.	Concentration problems
12.	Discipline problems and classroom management

Source: EDL, 2022

Each of 12 menaces was considered from two perspectives (Ahrens, Zascerinska, Filimonova, & Bikova, 2023):

- From the intrapersonal perspective, and
- From the interpersonal perspective.

The 12 emotional menaces were grouped into three categories, namely

- Management,
- Communication, and
- Adaptability.

Table 3 presents the three categories and their relevant emotional menaces.

3 table. Categories and relevant emotional menaces

1. Management	2. Communication	3. Adaptability
● Poor time management ● Discipline and classroom management ● Technical problems ● Adapting activities and materials	● Rapport ● Lack of non-verbal and paraverbal communication ● Students' motivation ● Group activities	● Fear of change ● Students' fatigue ● Emotional distance ● Concentration problems

Source: EDL, 2022

One menace was addressed by five statements. The five statements per menace were formulated in such a way that both perspectives, namely intrapersonal and interpersonal, were taken into consideration. In total, for the three categories (Management, Communication, and Adaptability) 60 questions were prepared. Table 4 presents the 20 statements for the Management category.

4 table. Statements devoted to the Management category

Nr.	Question
1.	Poor connectivity, a lack of quality internet access, no electricity, and no access to computers are the main difficulties faced by the teachers when trying to provide lessons to students via online classes.
2.	Uploading course materials within a short period of time does not cause me stress.
3.	When my laptop lags during the online class, I remain calm and am able to find a solution.
4.	I am able to ask colleagues for help when I experience technical issues, or I am able to find my own solutions.
5.	I am able to easily coordinate a live class.
6.	I feel confident when I have to digitally transform my educational practices, materials and activities for the purpose of the general transition to distance education.
7.	I feel competent when I need to convert an educational exam paper to an appropriate digital format (like PDF) and distribute it through a digital platform.
8.	I feel confident when I pause deductive teaching online to engage my students' questions, with the purpose of creating an interactive online learning session
9.	The development of an online trial class environment, prior to the beginning of a digital educational session, makes me more self-assured in utilising the newly established digital educational tools.
10.	I don't feel stressed when I have to modify my teaching materials, such as diagrams and charts into a digital format for the purposes of my online lessons.
11.	I find myself multitasking while scheduling an online course.
12.	I face difficulties in prioritising demanding tasks and abiding to a strict time schedule when I have to teach online.
13.	I avoid producing detailed course outlines when teaching online, because I experience complications in arranging my teaching schedule in time.
14.	I face difficulties planning in advance teaching materials when teaching online.
15.	I struggle to organise my assignments and adjust my working schedule to given course deadlines.
16.	I have more discipline problems in online classes than in face-to-face classes.
17.	I know how to react appropriately when students display challenging behaviour in online classes.
18.	It's better to ignore/mute difficult students in your online classes.
19.	I know how to recognise and prevent cyberbullying in my online classes.
20.	I can manage smaller groups, but face problems when I have more than 20 students in online classes.

Source: EDL, 2022

Table 5 shows the distribution between the positive and negative statements in the Management category.

5 table. Distributions of positive and negative statements in the Management category

Number of the statement	Positive statements	Negative statements
	1-10, 17, 19	11-16, 18, 20

Source: the authors

Table 6 presents the 20 statements for the Communication category.

6 table. Statements devoted to the Communication category

Nr.	Question
21.	I know how to use a video camera in a live class in order to interact both verbally and non-verbally with my students.
22.	I am aware of the importance of looking into the camera of the computer during online classes in order to keep my students engaged.
23.	I know how to express my emotions with body language during online classes.
24.	I am able to use hand gestures for illustrating my emotions while talking to my students in a live class.
25.	I am aware of the use of my facial expressions to show my emotions to my students during online classes.
26.	I know what creating rapport means.
27.	I know what active listening is and how to do it online.
28.	I have several techniques to create rapport with my online students.
29.	I know what powerful questions are and use them in my online classes.
30.	I know about my students' interests and use that information in my online classes.
31.	I feel stressed when I experience a loss of attention loss in my learners (eg. turned off camera, loss of eye contact, failure to respond to a request for interaction).
32.	Sometimes I am so frustrated with loss of attention, that I resort to calling my learners to task, pointing out that they are disrespecting the lecturer and fellow students.
33.	Sometimes I feel that there is nothing I can do to keep the attention of online learners.
34.	Sometimes I use long videos during online teaching, just to stop thinking about how to keep the students' attention.
35.	I am afraid that my voice sounds dull and weird, when I teach online.
36.	I understand the importance of designing effective group activities and the need to plan them thoroughly, in advance.
37.	I am able to confidently implement creative stress-management techniques and enhance my learners' emotional intelligence during group activities.
38.	I am aware of each of the necessary factors, such as trust, self-efficacy and identity required in the implementation of successful group activities.
39.	I feel competent and confident that I can help build rapport and promote positive collaboration between groups engaged in group activities.
40.	I recognise how both my emotions and that of the students' can affect group activities.

Source: EDL, 2022

Table 7 shows the distribution between the positive and negative statements in the Communication category.

7 table. Distributions of positive and negative statements in the Communication category

	Positive statements	**Negative statements**
Number of the statement	21-30, 36-40	31-35

Source: the authors

Table 8 presents the 20 statements for the Adaptability category.

8 table. Statements devoted to the Adaptability category

Nr.	Question
41.	I understand exactly what is meant by the term 'Emotional distance'.

42.	I understand how to spot the individual signs that a student is suffering from the effects of emotional distance.
43.	I recognise each of the factors that demonstrate emotional distance.
44.	I am equipped with the knowledge to assist students in overcoming symptoms of emotional distance.
45.	I understand the negative impact that emotional distance can have upon students.
46.	I am aware of what virtual fatigue is and I am able to identify its symptoms among my students.
47.	I use exercises to help my students stay awake and focused during online lessons, such as energisers and other physical activities and icebreakers.
48.	I have been able to adopt pedagogical activities which enhance the active involvement and participation of my students when feeling overwhelmed and tired.
49.	When designing lessons, I am aware of my students' learning styles (visual, auditory, kinaesthetic, etc) to include activities that can counteract fatigue.
50.	I have back-up plans and a wide range of techniques and activities that I use when I need to change the initial lesson plan due to students' fatigue and low energy.
51.	I feel no motivation when teaching online.
52.	I feel frustrated because I feel I am not effective at teaching soft skills online.
53.	It demotivates me to think that I have to change the way I manage and time my lessons, only to be able to teach online.
54.	I feel angry when I see that all my teaching competences are outclassed by the need for digital skills.
55.	I am afraid that I will lose my learners because of online teaching.
56.	I don't find myself distracted with background noise such as voices, electrical noise from devices, outside traffic, etc.
57.	I am able to spot the signs of a lack of concentration in both my students and myself.
58.	When a student is suffering from a lack of concentration, I put into practice different methods or techniques that help him/her regain focus.
59.	I am able to adopt different techniques that help me stay focused and on task.
60.	I am aware of the benefits of taking short mental breaks during lessons to help students and myself to regain focus.

Source: EDL, 2022

Table 9 shows the distribution between the positive and negative statements in the Adaptability category.

9 table. Distributions of positive and negative statements in the Adaptability category

	Positive statements	**Negative statements**
Number of the statement	41-50, 56-60	51-55

Source: prepared by the authors

4-point Likert scale was proposed for statement measurement:

1. Strongly disagree (1 point)
2. Disagree (2 points)
3. Agree (3 points)
4. Strongly agree (4 points)

Afterwards, the online tool "Self-assessment Quiz" was created on the EDL project website (http://edl-erasmus.site/self-assessment-quiz/).

Data Analysis

The data collected between February and June 2023 was processed.

Table 10 shows the percentage results in the Management category.

10 table. Percentage results in the Management category

Language	Strongly disagree	Disagree	Agree	Strongly agree
English				
Positive	9,38%	22,23%	48,69%	19,46%
Negative	9,42%	44,28%	36,57%	9,71%
Italian				
Positive	2,92%	20,77%	49,08%	29,69%
Negative	14,29%	35,43%	38,37%	11,71%
Greek				
Positive	5,38%	24,31%	49,85%	20,31%
Negative	4,86%	38,28%	46,57%	10,57%
Spanish				
Positive	11,62%	21,69%	39,00%	26,77%
Negative	24,00%	4,43%	25,00%	9,43%
German				
Positive	20,00%	27,80%	31,00%	21,50%
Negative	21,90%	33,25%	23,25%	21,90%
Irish				
Positive	15,38%	15,38%	34,62%	34,62%
Negative	0,00%	50,00%	35,71%	14,28%

Source: the authors

Table 11 illustrates the ranking results in the Management category

11 table. Ranking results in the Management category

Language	Management				Final ranking
	Positive answers in positive statements	Ranking of positive answers	Negative answers in negative statements	Ranking of negative answers	
English	**68,15%**	**3**	**53,7%**	**2**	**1**
Italian	**78,77%**	**1**	**49,72%**	**4**	**1**
Greek	**70,16%**	**2**	**43,14%**	**5**	**2**
Spanish	**65,77%**	**5**	**28,43%**	**6**	**3**
German	**52,50%**	**6**	**55,15%**	**1**	**2**
Irish	**69,24%**	**4**	**50,00%**	**3**	**2**

Source: the authors

Table 12 shows the percentage results in the Communication category.

12 table. Percentage results in the Communication category

Language	Strongly disagree	Disagree	Agree	Strongly agree
English				
Positive	7, 78%	18,47%	46,93%	26,87%
Negative	31,60%	40,60%	19,40%	8,40%
Italian				
Positive	7,33%	23,73%	40,33%	28,80%

Negative	10,60%	23,60%	35,40%	30,80%
Greek				
Positive	1,80%	12,47%	56,73%	29,00%
Negative	0,80%	20,40%	41,00%	38,00%
Spanish				
Positive	13,73%	24,47%	32,73%	28,80%
Negative	12,80%	22,00%	38,20%	26,60%
German				
Positive	21,40%	24,53%	30,47%	23,93%
Negative	18,20%	31,80%	30,60%	20,00%
Irish				
Positive	Not available	Not available	Not available	Not available
Negative	Not available	Not available	Not available	Not available

Source: the authors

Table 13 emphasizes the ranking results in the Communication category.

13 table. Ranking results in the Communication category

Language	**Management**				**Final ranking**
	Positive answers in positive statements	**Ranking of positive answers**	**Negative answers in negative statements**	**Ranking of negative answers**	
English	**73,80%**	**2**	**72,20%**	**1**	**1**
Italian	**69,13%**	**3**	**34,20%**	**4**	**3**
Greek	**85,73%**	**1**	**21,20%**	**5**	**2**
Spanish	**61,53%**	**4**	**34,80%**	**3**	**3**
German	**60,40%**	**5**	**42,73%**	**2**	**3**
Irish	**Not available**	**-**	**Not available**	**-**	**-**

Source: the authors

Table 14 highlights the percentage results in the Adaptability category.

14 table. Percentage results in the Adaptability category

Language	**Strongly disagree**	**Disagree**	**Agree**	**Strongly agree**
English				
Positive	3,50%	15,27%	54,67%	26,53%
Negative	25,40%	37,60%	27,40%	9,60%
Italian				
Positive	5,73%	21,46%	43,07%	29,87%
Negative	24,40%	42,20%	23,20%	10,20%
Greek				
Positive	1,60%	17,30%	55,87%	25,53%
Negative	10,00%	22,40%	50,80%	16,80%
Spanish				
Positive	15,13%	27,47%	29,33%	28,37%
Negative	18,40%	20,00%	33,40%	27,80%
German				
Positive	21,40%	26,27%	25,80%	27,00%
Negative	22,40%	36,60%	21,00%	20,00%
Irish				

Positive	16,67%	26,67%	26,67%	26,67%
Negative	0,00%	30,00%	70,00%	0,00%

Source: the authors

Table 15 presents the ranking results in the Adaptability category.

15 table. Ranking results in the Adaptability category

Language	**Management**				**Final ranking**
	Positive answers in positive statements	**Ranking of positive answers**	**Negative answers in negative statements**	**Ranking of negative answers**	
English	**81,20%**	**2**	**63,00%**	**2**	**1**
Italian	**72,94%**	**3**	**66,60%**	**1**	**1**
Greek	**81,40%**	**1**	**32,40%**	**5**	**2**
Spanish	**57,70%**	**4**	**38,40%**	**4**	**3**
German	**52,80%**	**6**	**59,00%**	**3**	**4**
Irish	**53,34%**	**5**	**30,00%**	**6**	**5**

Source: the authors

Table 16 summarizes ranking results in all the three categories, namely Management, Communication, and Adaptability, as well as points out the final ranking results of all the three categories.

16 table. Respondents' answers in the Communication category

Language	**Ranking in Management**	**Ranking in Communication**	**Ranking in Adaptability**	**Final Ranking**
English	**1**	**1**	**1**	**1**
Italian	**1**	**3**	**1**	**2**
Greek	**2**	**2**	**2**	**3**
Spanish	**3**	**2**	**3**	**4**
German	**2**	**2**	**4**	**4**
Irish	**2**	**-**	**5**	**5**

Source: the authors

Findings of the Study and Discussion

The online tool “Self-Assessment Quiz” was used in five countries of the European Union, namely Italy, Greece, Spain, Germany and Ireland. The online tool “Self-Assessment Quiz” was piloted in six languages, namely English, Italian, Greek, Spanish, German, and Irish.

All the respondents in all the six languages showed similar results in all the three categories. About 40% and higher percentage shown by the respondents agreed or strongly agreed in positive statements and “strongly disagreed” or “disagreed” in negative statements when assessing their management, communication and adaptability skills.

Interestingly, that the higher results were shown by the respondents in the category “Management” followed “Communication” and “Adaptability”. A high result in the category “Management” was probably received because nearly twice more respondents answered the questions in this category. A high result in the category “Management” means that teachers' emotions in the categories “Communication” and “Adaptability” have to be enriched.

The similarities in the results received from the users of the online tool “Self-Assessment Quiz” in six different languages reveal that the online tool “Self-Assessment Quiz” is of a good quality and could be further used for the self-assessment of emotion in online teaching in the three categories, namely management, communication and adaptability.

Despite the similarities in the obtained results, some differences were revealed when the results were compared and ranked. The difference is that the respondents who used the English version of the online tool “Self-Assessment Quiz” assessed their emotions in management, communication and adaptability at a higher level in comparison to the respondents who used the Spanish or German versions of the online tool “Self-Assessment Quiz”.

The results of the respondents who used the Irish version are only partly known. Also, only 2 respondents took part in the “Self-Assessment Quiz”. That is why the reliability of their results has to be confirmed by other studies with the increased number of respondents.

CONCLUSIONS

1. The theoretical analysis allows for the conclusion that teachers’ self-assessment of their emotions as well as the modern innovative online tool, namely Self-Assessment Quiz, used for measurement of adult teachers’ self-assessment of their emotion in online teaching in selected European countries, are linked.
2. The study results reveal that the positive evaluation of emotions in online teaching by respondents from the selected European countries, namely Italy, Greece, Spain, Germany and Ireland, prevails.
3. The data analysis allows drawing the conclusion that teachers’ emotions in the categories “Communication” and “Adaptability” have to be trained.
4. Piloting of the online tool “Self-Assessment Quiz” in six languages, namely English, Italian, Greek, Spanish, German, and Irish, shows that the online tool performs in the desired manner with enough fidelity to meet the analysis objectives.
5. The new research question is put forward: What is an online tool for the assessment of adult learners’ emotion in online classes?
6. Further research could highlight adult learners’ emotions in online classes. Also, it would be interesting to compare teachers’ and learners’ emotions in online classes.

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MINDFULNESS BASED ART THERAPY APPROACH FOR SENIORS: NEED ANALYSIS

ALEKSANDRA BATUCHINA
SMK University of Applied Sciences, Lithuania

Abstract

COVID-19 pandemic has had a negative influence impact on the health, both physical and mental of the older population. Seniors were more likely to get anxiety, depression, a feeling of loneliness, and experiencing other mental issues. At the same time, one of the ways to deal with negative effects on mental health is mindfulness practice and a comparatively new approach Mindfulness Based Art Therapy (MBAT), which could be very beneficiary for older adults. The study aimed to determine the most common mental health problems among seniors in the context of the COVID-19 pandemic and ways to cope with these problems, as well as to reveal challenges in MBAT application. 33 adult educators were interviewed (in total 8 focus groups) across the six countries. Results analysis was performed using the thematic analysis method. Research results have shown that MBAT as a therapeutic approach in only gaining familiarity among seniors, however, is not very common. Moreover, the role of the adult educator is crucial in this process since they are intermediaries between the popularity of different meditative practices and seniors.

Keywords: Mindfulness-Based Art Therapy, mental health of seniors, COVID-19

INTRODUCTION

The global population is experiencing rapid demographic change, with Europe being the leading region in the process of aging. According to the Population Reference Bureau, Europe is the oldest region in the world, with 21 percent of the population aged 65 and above (Countries with the oldest populations in the world, n.d.). Eurostat data also shows an increase of the population aged 65 years in the EU, with consistently low birth rates and higher life expectancy, transforming the age structure of the population (Eurostat, 2020; WHO, 2022). Such aspects cause different economic, political, and social consequences. As a result, it is highly important to maintain not only the physical but also the mental health of the population.

Moreover, the COVID-19 pandemic has had a negative influence impact on the health, both physical and mental of all ages. Talking about mental health, it is worth mentioning, that the pandemic period caused such consequences as depression, anxiety (The Implications of COVID-19 for Mental Health and Substance Use, 2023), and worsening of pre-existing psychiatric disorders (Haider, et al., 2020), post-traumatic stress disorder (PTSD) (COVID-19 Mental Health Information and Resources, n.d.) and others.

At the same time, older adults, or so-called seniors have experienced an even greater impact on mental health during the COVID-19 pandemic time. Not only they were more likely to get the virus, but also they were more often experiencing such psychological problems as increased anxiety, depression (Cocuzzo, Wrench, & O'Malley, 2022), feelings of isolation, sleep disorders (Blue Shield of California, 2022) and have had low quality of life, especially if they experienced COVID-19 symptoms (Haider, Tiwana, & Tahir, 2020). Moreover, loneliness arose when people were generally limited in being able to meet each other's, both in relation to being able to meet around for an activity, but also just being in the company of and socializing with others (Ældresagen, 2023).

One of the ways to deal with negative effects on mental health is mindfulness practice. Mindfulness techniques: well-known meditation, breathing exercises, body relaxation and other practices have positive effects on mental health and well-being. Mindfulness can help people become more aware of their thoughts, feelings, and sensations, and develop healthy thought patterns (Cronkleton, 2022). Mindfulness is a tool that can be used to manage mental health and well-being and has been shown to have positive effects on several aspects of whole-person health, including the mind, the brain, the body, and behavior (How to look after your mental health using mindfulness, n.d.).

There are many variations of mindfulness theory, one of which is Mindfulness-Based Art Therapy (MBAT). It has its roots in Mindfulness-Based Stress Reduction (MBSR) (developed by J. Kabat-Zinn). Mindfulness-based art therapy (MBAT) is a relatively new approach that was introduced by psychologist and author Laury Rappaport back in 2009 in the book "Mindfulness and the Arts Therapies" (Rappaport, 2014). The integration of art therapy with MBSR has led to the development of MBAT, a new approach that combines mindfulness practices with art therapy (Geiger et al, 2016). In other words, one engages in the process of making art as a way of mindfully exploring oneself and the environment. This integration aims to include the creative process of art-making in self-exploration, providing a unique approach to therapy. It is important to note that Mindfulness-based art therapy leans on Focus-oriented art therapy, as the name says is "focus" and changing focus during the creative process is part of the process. Focus-oriented therapy strengthens the client's thoughts, feelings, and experiences (IAFOTs, 2023). This approach combines the idea behind mindfulness through creative activities, where you immerse yourself in the creative process of creating artistic expressions and thereby mindfully explore yourself. Mindfulness-based art therapy helps people to express feelings through creative processes and for people to "let go". At the same time, improved attention and awareness are achieved, as well as increased self-esteem and self-acceptance (Van Lith, 2021).

Mindfulness-based art therapy can be beneficial for people of any age. According to a literature review, mindfulness-based interventions can improve the physical and emotional well-being of older adults (Brown, 2012). Mindfulness-based art therapy combines art with mindfulness to improve psychological issues, such as anxiety and depression (Cuncic, 2023). Art therapy can also aid in relief of pain, anxiety, and depression, and inspire hope, purpose, and a sense of identity, even in the face of decline (Clark, 2023). Additionally, mindfulness-based therapy may be useful in altering affective and cognitive processes that underlie multiple clinical issues (Davis & Hayes, 2012). Therefore, mindfulness-based art therapy can be an effective intervention for improving the well-being of the elderly population. Another advantage of MBAT is that it does not require therapeutic conversations but can be practiced on your own at home (Rappaport, 2014).

Research topicality and problem. MBAT is a comparably new approach, not well known and widely used, however, its advantages create an assumption, that it could be used with seniors to improve their mental health. According to the WHO Special Initiative for Mental Health (2019-2023): Universal Health Coverage for Mental Health there can be no health or sustainable development without mental health. Also, with ageing of the population importance of taking care of mental health increases.

The aim of the research. The aim of the study was to determine the most common mental health problems among seniors in the context of the COVID-19 pandemic and ways to cope with these problems.

The research methodology. The current study was based on the qualitative approach, with focus group interviews with semi-structured questionarre. The study involved specialists from various fields, including social workers, medical workers, employment specialists, psychologists, art therapists, and others. 33 specialists (adult educators) were interviewed (in total 8 focus groups) across six countries (Lithuania, Cyprus, Denmark, Spain, Turkey, Poland).

The research results. Research results have shown that MBAT as a therapeutic approach is still gaining familiarity among seniors. Moreover, the role of the adult educator is crucial in this process since they are intermediaries between the popularity of different meditative practices and seniors.

Originality/Value of the article. Mindfulness-based art therapy (MBAT) is a relatively new approach; however, its positive effect is already scientifically proven. Current research highlights mental issues that seniors were experiencing during and after the COVID-19. Moreover, showing the importance of the adult educator's role in the promotion of meditative and artful practices. Nevertheless, adult educators are facing some obstacles in performing it more frequently with seniors.

RESEARCH METHODOLOGY

Current research was implemented under the Erasmus + KA2 project MBAT4Seniors: Mindfulness-Based Art Therapy as Effective Tool to Improve Mental Health of Seniors in the context of COVID19 pandemic (2021-1-LT01-KA220-ADU-000030408). One of the tasks of the project was to create a mindfulness and art therapy training package for adult educators and seniors, available on an e-learning platform and Android mobile app. For this purpose, a precise need analysis was made.

The aim of the study was to determine the most common mental health problems among seniors in the context of the COVID-19 pandemic and ways to cope with these problems. Moreover, as well as to reveal challenges in MBAT application among seniors.

The study employed a qualitative research strategy and was carried out in 5 countries (Lithuania, Spain, Poland, Cyprus, Turkey, and Denmark) from summer 2022 till the beginning of 2023. As a data collection method – a semi-structured focus group interview with adult educators was chosen. The study involved specialists from various fields, including social workers, medical workers, employment specialists, psychologists, art therapists, and others (the common term – adult educators was chosen). A total of 33 specialists were interviewed (8 focus groups) across the six countries (Lithuania, Cyprus, Denmark, Spain, Turkey, Poland). An additional goal of the study was to identify the needs and preferences of seniors and adult educators regarding the development of an Android mobile app to reduce stress through mindfulness practices and art therapy.

The same for all countries research instrument was developed in advance. Questions of the questionnaire were focused on uncovering mental health problems, identifying their causes, determining the familiarity of adult educators and seniors with mindfulness education and art therapy, and exploring the MBAT techniques they use in their work with seniors. Also, some questions about seniors' digital skills, daily frequency of mobile application usage, and overall ability to use digital tools were included.

The data was analyzed using the thematic analysis method, which involves reading through the data and identifying patterns in the meaning to find themes. The thematic analysis of the interviews was conducted, wherein the researcher delved into the examination of various themes and subjects. Themes emerged organically from the data, offering a nuanced understanding of the complex interplay between aging, the pandemic, and the potential application of innovative therapeutic approaches for seniors' mental well-being. However, only part of the interview data, which directly helps to answer the current article's aim is presented below.

RESEARCH RESULTS AND DATA ANALYSIS

Four main themes emerged from the results: mental issues of the seniors, causes of mental issues, stress coping strategies during the Covid-19 times, and challenges of mindfulness-based art therapy application.

Mental issues of the seniors

Research results have shown that the most common mental health issues encountered by seniors in the context of the COVID-19 pandemic were the following: anxiety, aggression, anger, annoyance, loneliness, sadness, fear (of the Covid virus; death; loneliness and others), and a sense of insecurity. Insomnia, stress, and depressed mood were also frequently mentioned. As one of the focus group interview participants mentioned: "*they (seniors) generally experience mental health problems such as embittered, angry, hopeless burnout syndrome, agitated mood, depression and fear of death*" (E2). Moreover, some of the adult educators have noticed a slide change in the list of the most common mental issues, which were before and after the pandemic (E11, E21, E30): "*After the pandemic problems are completely different, they (seniors) developed many mental diseases. For example, a lot of them have Alzheimer's. Many people 65+ didn't recognize me when I went to their home after the pandemic.*" Another focus group interview participant shared an interesting idea: "*Now we are living in a mental pandemic. Mainly all the people have depression, people don't interact socially, they need social networks to know new people and improve their self-esteem. Before you just need to go to parties or somewhere else and use your creativity to know new people. Nowadays with social networks, this creativity disappears*". Such an aspect is also common for seniors, who were more socially active before the Covid-19 outbreak, while after the pandemic only partly came back to social life (going back to the social service centres, communities, and other gathering places.) As one of the adult educators from Spain has said, seniors are experiencing "the so-called „*cabin syndrome*". *People are afraid to go out from home and are not used anymore to socialise* (E29).

Causes of mental issues

Even though the main object of the study was COVID- 19 pandemic period, results also revealed, that the above-mentioned mental issues worsened not only due to pandemic situation but also for other reasons and causes. The mentioned reasons were grouped into corresponding subgroups:

- financial issues (*lack of money* (E15; E20), *increasing prices* (E1; E2),
- health issues (*dementia* (E18; E31), *physical problems associated with aging* (E1; E2; E8; E9; E11; E23); *E28*),
- exclusion (separation from relatives: *"As they get older, they become dependent on other people and separated from their loved ones, their children become distant from themselves and live other lives* (E4)", (E3); *dependence on others* (E22); *feeling of limitations (*E30); *despair due to loss of social status after retirement.*
- loss of the closed ones (*divorce (E13)*, *loss of a spouse* (E19; E23), and others).

As one of the adult educators has mentioned the COVID-19 pandemic and disease, as well as the threat of getting sick, were not highlighted as most influencing or causing mental problems: "*not related to COVID-19, it is related to the hardships of life; now people (who lived with seniors) are away. They are all working, now we hardly have any time to each other*" (E13). However, several participants have mentioned, that their work with seniors has changed, due to the change in seniors' mental issues, and the reason is COVID-19: "*Covid worsened these problems that were already present in the adult population* (E19, E27). Moreover, it is important to mention, that the research was conducted in the same year, just a few months after the Russian invasion of Ukraine and the beginning of the war. As a result, general psychological stability was fragile.

Coping strategies

Interview research analysis has shown that seniors use very different stress and other mental issues coping strategies. One of the most common strategies and most frequently mentioned was *seeking communication* (E7, E11, E23, E29). Adult educators noted that when seniors feel anxious or experience negative emotions, they try to communicate as much as possible, even though the ways and options were very limited due to the pandemic situation. They also mentioned, that for seniors it was important to share their feelings and emotions with people they trust, such as a group leader or educator, or even a doctor, or nurse. Some adult educators openly stated that seniors often use *sedatives* (E2) or *other medications* to combat stress (E1). However, only a small part of the seniors, as adult educators have mentioned, were practicing mindfulness, art therapies, or other therapies. Usually, those seniors were encouraged by adult educators: "*they would need to be promoted more to create awareness first. Once they get to know they become interested, but they need to be promoted first*" (E18). Others were practicing mindfulness (e.g. Walking meditation or breathing exercises) intuitively, without any specific knowledge about it. Talking about art therapy, an interesting response came from Spain, where a study participant working with seniors mentioned the low cultural level of some seniors, leading to their ignorance of art, therapy, meditations, and similar practices. "*The cultural level (centre) here is very low, people don't know art. As a result, only the minority do it*" (E29). However, this idea contradicts to others research participants. Adult educator, who participated in the research and working as social worker at social service centre in Denmark mentioned, that *"they (seniors) adapted quickly to the environment (to the pandemic situation). Especially during the pandemic process, they expressed themselves more authentically in artistic activities"* (E32). Thus, seniors were actively inclined to artistic activities, especially visual and music (E27).

Challenges of the mindfulness-based art therapy application while working with seniors

The study also aimed to highlight the challenges faced by adult educators while implementing mindfulness-based art therapy or other meditative and artful practices with seniors. The most often mentioned challenge among adult educators was the lack of finances. This challenge is closely related to another challenge: lack of knowledge and skills related to applying mindfulness-based art therapy or mindfulness theory since adult educators need to participate in the courses or graduate from a specific education.

Another mentioned challenge has highlighted the absence of necessary methodologies (E1; E7; E16; E22). Additionally, the lack of *human resources* (E15) and *the complexity of working conditions during the COVID-19 pandemic* (E11), leading to increased professional burnout among specialists, were noted. Moreover, the *unpreparedness of seniors (E19)* which encompassed multiple factors such as *their unwillingness to adopt new methodologies(E19)*, seniors' health problems that hinder their ability to freely practice MBAT (e.g., Parkinson's disease) (E22; E29), *limited access to institutions offering mindfulness-based art therapy* (E14), low levels *of IT skills* (E22; E23; E27; E29), which are very important if MBAT practice is presented online, via mobile or tablets applications or even when the communication with the adult educator is performed online (e.g. via zoom program).

CONCLUSIONS

1. Research results have shown that seniors are experiencing a great number of mental issues, which are not only connected with the aging process but also due to the pandemic situation and other reasons becoming worse and more intense.

2. Reasons influencing the worsening situation of seniors' mental health are complex and mostly connected with the consequences of the global, national, and international aspects (pandemic, war, and others) and personal tragedies.
3. Mindfulness as a therapeutic practice is not very common among seniors, while MBAT is mostly practiced as a variation of art therapy or other meditative practice. Moreover, for a wider popularity of the current approach among senior adult educators' encouragement is essential.
4. Research results also have shown that even though MBAT is a very effective, same time easy to practice, approach, still adult educators are facing some obstacles in performing it more with seniors. As a result, wider use of MBAT among seniors should begin by providing adult educators proper methodology and improving new skills and knowledge.

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A DIFFERENT PERSPECTIVE TO URBAN GENTRIFICATION: FOREIGNIZATION

YASIN ÇAM, SUSRAN ERKAN EROĞLU
Osmaniye Korkut Ata University, Türkiye

Abstract

This study created using quantitative data, evaluates the concept of urban gentrification from a different perspective. Unlike the known definitions of gentrification, the focus is on indirect displacement of local people in areas due to foreign density. The effects of foreigners migrating to a country in that country were examined. In the study, the effects of foreigners on the cities in Türkiye were examined. In this study, which was created using ready-made data, it was concluded that a city's demography, economy, social life, and culture of life changed as a result of foreign immigration from abroad, and a different environment was created for the local people there. Within the scope of all these results, the indirect displacement of local citizens by foreign citizens concentrated in a region is also considered as foreignization as a different type of gentrification.

Keywords: gentrification, foreignization, migration, Türkiye.

INTRODUCTION

Background and the research topicality. Türkiye is a country that has been affected by the economic, political, and military developments caused by the ongoing economic instability, internal conflict, conventional war, poverty and limited socioeconomic opportunities in the surrounding countries and plans its policies in different areas according to these developments. Periodically, it receives mass migrations from neighbouring countries where antidemocratic practices are traditional and political and social problems are frequently manifested. The civil war situation that emerged after the protests that started in 2011, especially in the Syrian Arab Republic, has exposed Türkiye to an intense wave of migration. Similarly, in the last days of February 2022, a new civilian migration started due to the war launched by Russia against Ukraine, and Ukrainians who were victims of war immigrated to many countries, especially eastern Europe. Türkiye, which is frequently preferred by Ukrainian and Russian citizens for vacation in the summer, was seen as a safe zone to take shelter in in case of this conventional war, so many Russian and Ukrainian people have turned to Türkiye. Similarly, it is known that many people from different countries who come to Türkiye for tourism purposes decide to stay permanently or own real estate for the purpose of spending certain periods of the year in Türkiye. Türkiye, which receives immigrants from many different countries, especially from countries in the Middle East, is a country where the foreign population tends to increase. The increase in the foreign population based on provinces affects many areas, especially the social and economic life in that province. First, the tendency of the foreign population to purchase housing drives the housing prices upwards in the relevant district of that province. Similarly, in the social spaces of cities, product prices tend to increase according to the foreign orientation. As a matter of fact, the living conditions in a region change depending on the density of foreigners, and the residents of the region who lived there before are affected positively or negatively. The profile change for foreigners creates a new urban culture and may even create a movement to eliminate the local people from the region.

The main idea in this study, which was created by examining different electronic and printed documents; The aim of this study is to examine the potential of people (mass) who leave their country of origin for a war, internal conflict, ethnic/religious oppression, any instability or voluntarily, for tourism purposes, to create an effect similar to the gentrification process in the city/cities of the country they go to. The mainstay of this idea is the possibility that the social and economic environment can change on unchanging fixed structures, rather than being limited to the idea that the gentrification phenomenon occurs only because of physical changes in the structures.

In the study, for the example of gentrification/alienation, the focus is on the provinces that foreigners frequently prefer from Türkiye such as Istanbul, Antalya, Muğla, Yalova, Mersin and Trabzon. While Istanbul is a global city with historical value, it receives foreign immigration, while other cities come to the fore as cities preferred by foreigners due to tourism, natural beauties, calmness, and economically favourable living conditions. According to the density of foreigners, the settled culture in some parts of the cities changes over time.

Urban transformation and development have become a constant reality of contemporary cities. However, it is essential not to forget that urban transformation is not merely a process that changes physical infrastructure but also affects the lifestyles, identities, and social relationships of urban dwellers and migrants. In this article, we will approach urban transformation and gentrification processes from a different perspective by discussing the concept of "foreignization". Foreignization will be examined as a social and cultural phenomenon that can lead to a sense of estrangement among both migrant city-dwellers and locals living in the city. Additionally, the experiences of foreign elites affected by this process will also be considered.

Türkiye, responding dynamically to economic, political, and military shifts in neighbouring regions, has been a recipient of mass migrations driven by ongoing instability, internal conflicts, and limited socioeconomic opportunities in surrounding countries. Notably, events such as the civil war in Syria since 2011 and the recent conflict between Russia and Ukraine in February 2022 have intensified migration waves, transforming Türkiye into a destination for those seeking refuge. The influx includes not only temporary visitors but also individuals opting for permanent residence or property ownership.

Türkiye's attractiveness, particularly to Ukrainian and Russian citizens, stems not only from its geopolitical stability but also its status as a favoured vacation spot. However, the consequences of this migration extend beyond tourism, profoundly impacting social and economic aspects of provinces. The rise in foreign populations, especially in provinces like Istanbul, Antalya, Muğla, Yalova, Mersin, and Trabzon, influences housing markets and social spaces, leading to shifts in urban cultures and potential alterations to the composition of local populations.

The aim of the research. This study, based on an extensive review of electronic and printed documents, aims to investigate whether the influx of individuals leaving their countries due to war, internal conflicts, ethnic or religious oppression, or for tourism purposes could instigate an effect analogous to the gentrification process in Türkiye's cities. Contrary to conventional gentrification perspectives solely focused on physical changes, our emphasis lies in understanding the potential transformation of social and economic environments while keeping the physical structures constant.

Focusing on cities such as Istanbul, known globally for its historical significance, and other cities attracting foreigners for tourism, natural beauty, tranquillity, and favourable economic conditions, we explore the dynamics of gentrification and alienation in provinces with varying degrees of foreign density. The study acknowledges that urban transformation is a multifaceted process, extending beyond physical infrastructure to shape the identities and social relationships of both urban dwellers and migrants.

The research value. In this article, we introduce the concept of "foreignization" as a lens through which to analyse urban transformation and gentrification processes. Foreignization is examined not only as a socio-economic phenomenon but also as a social and cultural force capable of inducing a sense of estrangement among both migrant city-dwellers and residents. Additionally, we consider the experiences of foreign elites impacted by this process, broadening the understanding of the multifaceted effects of foreignization in the urban context.

RESEARCH METHODOLOGY

Research Design

The study adopts a quantitative research design to systematically investigate the effects of foreignization on urban transformation in Türkiye. This design allows for the collection of numerical data to discern patterns, correlations, and trends associated with the influx of foreign residents.

Data Collection

The secondary data sources include official government records, statistical databases, and relevant scholarly articles focusing on migration patterns, demographic changes, and socio-economic indicators in Türkiye.

Time Frame

The study encompasses data collected over a specified period, reflecting the dynamic nature of urban transformation and migration trends.

Sampling Strategy

Population: The population in question includes urban areas in Turkey that receive intense foreign immigration; It focuses especially on cities known to be densely populated by foreigners, such as Istanbul, Antalya, Mugla, Yalova, Mersin and Trabzon.

Sampling Method: A stratified random sampling method is employed to ensure representation from various regions with differing levels of foreignization.

Variables and Measurements:

Dependent Variables: The study assesses changes in demography, economy, social fabric, and cultural landscape within selected urban areas.

Independent Variables: Key independent variables include the density of foreign residents, migration patterns, and economic indicators.

Measurement Tools: Standardized measurements, such as demographic statistics, economic indices, and cultural indicators, are utilized to quantify the impact of foreignization.

Data Analysis

Statistical Techniques: Quantitative data are subjected to statistical analysis, employing methods such as regression analysis, correlation analysis, and descriptive statistics to identify significant relationships and trends.

Spatial Analysis: Geographic Information System (GIS) tools may be employed to visualize and analyse spatial patterns of foreignization and its impact on urban areas.

Ethical Considerations

The study adheres to ethical principles, ensuring the privacy and confidentiality of individual data. All data utilized are aggregated and anonymized to prevent the identification of specific individuals.

Limitations

The study acknowledges potential limitations, such as data availability and reliability. The reliance on existing records may constrain the depth of analysis, and the study does not delve into qualitative aspects that may complement the quantitative findings.

Validity and Reliability

The validity of the study is reinforced using established data sources and standardized measurement tools. Reliability is ensured by the systematic approach to data collection and the transparent documentation of methodologies.

The research methodology section concludes by summarizing the chosen design, sampling strategy, variables, measurement tools, analysis techniques, ethical considerations, and acknowledged limitations.

This study employs a quantitative research design to investigate the impact of foreignization on urban transformation in Türkiye. Drawing on official government records, statistical databases, and relevant scholarly articles, the data collection process spans a specified period, focusing on cities with significant foreign residency, including Istanbul, Antalya, Muğla, Yalova, Mersin, and Trabzon. A stratified random sampling method is utilized to ensure representative data from various regions with different levels of foreignization. The study assesses changes in demography, economy, social fabric, and cultural landscape within these urban areas, with key variables including the density of foreign residents, migration patterns, and economic indicators. Quantitative data undergo statistical analysis, employing regression analysis, correlation analysis, and descriptive statistics to identify significant relationships and trends. Ethical considerations prioritize privacy and confidentiality, ensuring the anonymization of individual data. Acknowledging limitations, such as data availability and reliance on existing records, the study aims for validity through established data sources and standardized measurement tools, maintaining reliability through a systematic approach to data collection. This comprehensive methodology contributes to a nuanced understanding of the multifaceted phenomenon of foreignization in urban contexts.

GENTRIFICATION CONCEPT

The concept of gentrification is defined in the literature as the voluntary or compulsory abandonment of low-income residential areas, which can be considered bad, dysfunctional, and outdated in terms of structural features, and the settlement of middle- or higher-income groups, and the realization of a socio-cultural transformation in these regions (Bal, 2015). p. 262; Ergun, 2006; Özden Giritlioğlu, 2016, p. 152). The concept was first used by Ruth Glass in the 1960s to describe the transformation process of workers' quarters that emerged with the settlement of middle- and upper-income people (Ergun, 2006; Kayalar, 2009; Çeker and Belge, 2015). After this settlement process, it is possible to see social, economic, cultural, and physical changes in the relevant region. The first examples of the structural, social, and economic transformation process called gentrification emerged in the 1950s and 1960s in some selected regions of the USA (United States of America) and England (Smith, 1979: Henig, 1980: 538; Goetz, 2011: 1600; Sutton, 2020). This transformation process, which continued throughout the 1970s, was implemented in 260 cities with a population of more than 50,000, especially in the USA. Although this concept has different definitions such as displacement, the creation of a new society or the destruction of a society, it is basically defined through economic and cultural values (Smith, 1979: 538). The structural transformation that emerges within the scope of urban projects carried out with different purposes such as rehabilitation, rehabilitation and revitalization create a social transformation. Equipping the neighbourhoods where urban poverty is visible and low-income people living, who isolate themselves from the urban society, with safer, stronger, and healthier structures within the scope of the project, attracts people belonging to the upper income group living in different parts of the city, and an orientation to this region, which was not interested before, begins. As a result of this orientation, the region becomes more attractive, turns into safe housing and social living areas where the crime potential due to poverty is low, and where people live above a certain income level. As a matter of fact, gentrification, which is a process towards improvement in social and physical structures, is not an urban renewal policy, but a result of renewal (Özden Giritlioğlu, 2016, p. 152). The transformation experienced in the region where low-status housing areas are oriented towards the middle- or upper-income groups leads to gentrification as a desired or undesirable result. The gentrification process can occur because of an urban project or because of individual land and housing purchases.

Gentrification is a rapidly spreading urban transformation process that has sparked debates in recent years. It is often characterized by the arrival of wealthier and more educated residents in poor and marginalized neighbourhoods, leading to changes in the socioeconomic structure and identity of these areas. In this article, we will delve into the concept of gentrification, examining its causes, effects, and controversies.

1. **What is Gentrification?:** The term “gentrification" was coined by British sociologist Ruth Glass in 1964 which combines the word "gentleman" with "terrify." Gentrification refers to the process where affluent and more educated residents move into older and often economically disadvantaged neighbourhoods, transforming them into areas with higher-priced housing and commercial spaces.
2. **Causes of Gentrification (**The primary causes of gentrification include*): a. Economic Changes*: Revitalization of city centres and increased job opportunities make central areas more attractive to wealthier segments of the population. b. *Housing Market and Rent Prices:* The purchase of older and neglected buildings at more affordable prices and rising rental costs attract new residents. *c. Infrastructure Investments:* Infrastructure and transportation investments made by investors in central areas increase the appeal of the region. *d. Cultural Shifts:* The relocation of creative industries and artists to these areas, along with the spread of "hipster" culture, can bring about changes in the identity of these neighbourhoods.
3. **Effects of Gentrification (Gentrification has both positive and negative effects):**
   a. Positive Effects: • Revamped buildings and infrastructure lead to the revitalization of city centres and create job opportunities. • Increased investments and the arrival of wealthier residents can reduce crime rates and enhance safety. • Gentrification can alter the fate of impoverished areas, reducing socioeconomic disparities.
   b. Negative Effects: • Soaring rental prices may force existing low-income residents to move out of these areas, leading to social exclusion. • Gentrification can result in the loss of traditional neighbourhood identity and changes in local culture. • The arrival of wealthier residents may lead to the neglect of the lifestyles and needs of existing residents.
4. ***Controversies Surrounding Gentrification***: Gentrification has sparked numerous debates:
   a. *Social Justice*: Gentrification can lead to the displacement and marginalization of low-income populations, giving rise to discussions about social injustice and inequality.
   b. *Identity and Cultural Change*: Gentrification may lead to the disappearance of local identity and culture, causing residents to lose their connection to their heritage.
   c. *Displacement*: Rising rental prices and property values can lead to the displacement of existing residents to other areas.

Foreignization also causes alienation problems in cities. The concept of alienation should not be confused with the concept of foreignization. Some basic events related to alienation in cities are discussed below. However, the main subject of this study is foreignization.

Alienation: Concept and Context: The concept of alienation is generally defined in the social sciences as the feeling of being estranged, despite being a part of a society or environment, resulting in a sense of not belonging. Since cities often experience significant migration movements, we can say that this concept is effective in urban areas as well.

Alienation Experienced by Migrant Urban Dwellers: Migrants often move to cities in search of better economic opportunities and living standards. However, urban transformation and gentrification processes can lead these migrants to feel like strangers in their living spaces and neighbourhoods due to interventions in their physical environment. Changes in the physical environment and increased living costs can weaken the sense of belonging among migrants, making them feel like foreigners in the city.

Alienation in the Context of Education for the Alienated: Urban transformation processes can affect not only physical spaces but also the education system. Residents of poor and disadvantaged neighbourhoods may have limited access to education, making it challenging for them to integrate into society. Alienation, especially in these communities, can be exacerbated due to unequal educational opportunities and discrimination.

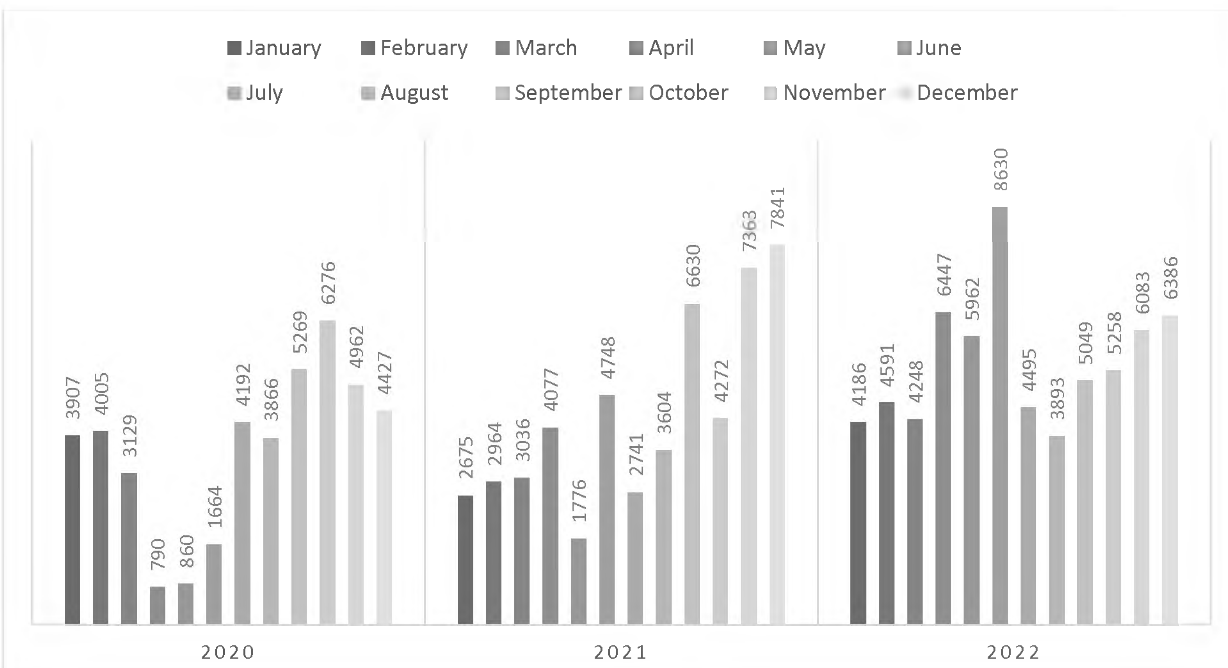
Foreigners and Alien Elites in the Urban Area: Urban transformation and gentrification processes can have significant effects not only on the local population and migrants but also on foreign elites coming from other countries. International capital and foreign investors can participate in urban transformation projects and change the city's fabric by constructing luxury housing.

Foreign elites, while physically present in the city, may experience differences in class, culture, and language compared to the local population. These differences may not be well-received by the local population and can lead to a sense of alienation. The luxurious lifestyle and consumption habits brought by foreign elites to the city may contradict the lifestyles of the local population and disrupt the social balance of the city.

FOREIGNERS IN TÜRKIYE

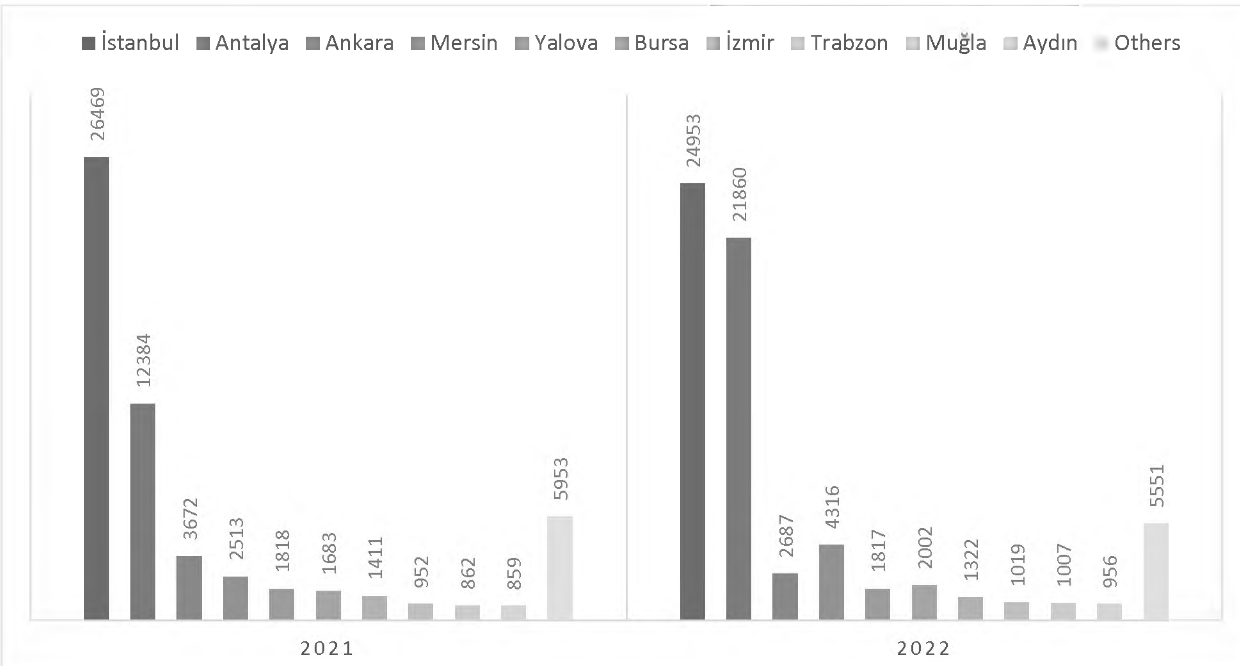
Foreign migration to Türkiye, which started in the last period of the Ottoman Empire and continued after the proclamation of the republic, started to accelerate with the effect of the transition to neoliberal economic policies after 1980 and the globalization process. Along with the socio-economic and cultural changes created by globalization, many reasons such as political developments, expansion of trade volume, wars and conflicts, development of communication and transportation opportunities have increased migration to Türkiye along with other countries according to their region (Yakar and Temurçin, 2013, p. 229; Sağıroğlu, 2015, p. 10). In addition, due to the integration of the Northern European countries into the European economies, the free movement of the citizens of these countries has facilitated their access to the warm Mediterranean coasts for a holiday or to continue their retirement life. Especially the fact that Türkiye is a cheap and important Mediterranean country has increased the tendency of these people to move towards Türkiye after 1980 (Karakaya and Turan, 2006, p. 3).

Türkiye can be the target point of legal migrations that occur because of positive or stable developments, as in the case of irregular migrations arising as a result of negative developments in recent years (Syrian Civil War, Taliban Rule in Afghanistan, Russia-Ukraine War). There are different reasons that affect the decisions of the migrant group. As mentioned before, the starting location, transit route and destination point of immigration are decisive for irregular migrations, while some characteristics of the destination country are considered for legal migrations. Economic situation, social life, justice, education and health services, environmental and cultural values, transportation opportunities, the location of the country are just a few of them. Türkiye is very rich in terms of historical and cultural assets as it is a state founded on lands where many different civilizations lived in the past. In the Anatolian geography, where various racial and religious societies live, various historical immovable assets belonging to these societies are under protection and are preserved as human heritage. In addition to its cultural and historical values, Türkiye attracts the attention of people living in European, northern, and Arab countries for sea and mountain tourism purposes. Some of the millions of tourists who come to the country for tourism purposes every year, some prefer to live in Türkiye for certain periods, while others prefer to stay in Türkiye. There are groups from foreigners in Türkiye whose purpose of being permanent is personal preference, and there are groups that can be interpreted as an escape from the various problems experienced in the countries of the persons concerned. These groups are the citizens of Syria, Iraq, Afghanistan, Pakistan, Yemen, and Ukraine, who are experiencing problems such as political and economic instability, internal conflict, terrorism, war, ethnic and religious oppression or separation, political pressure. The process results in the migration of people to different countries, especially in these countries, and in other countries with similar political and socio-economic problems. The return of political pressure and economic instability in the countries around Türkiye (Middle East) leads people to Europe. Türkiye, which Middle Eastern countries see as a gateway or route to Europe, is not only a transit point, but also a country open to settlement for foreigners that it complies with legal procedures.



1 fig. Number of houses sold to foreigners in Türkiye by month (2020-2021-2022)
Source: TÜİK (2023).

According to figure 1, which shows the number of houses sold to foreigners in Türkiye in 2020, 2021 and 2022, when house sales to foreigners in Türkiye are analysed on a monthly basis in the last three years, it has followed a fluctuating course in the direction of increase and decrease, while it is observed that the upward trend continues when analysed on an annual basis. In 2020, 40,218 residences, 51,727 residences in 2021, and 65,228 residences in 2022 were sold to foreigners in Türkiye. In 2020, with 6,276 house sales to foreigners, the most houses were sold in September, while the lowest house sales were made in April with 790 house sales. While the highest house sales were made in December with 7841 house sales in 2021, the lowest house sales were made in May with 1776 house sales. In 2022, while the highest sales were made in June with the sales of 8630 houses, the lowest sales were made in August with the sales of 3893 houses. In the last three years, the amount of housing sold to foreigners in Türkiye is 157.173 in total. Housing sales in total in 2021 increased by 28.61% compared to 2020, and house sales to foreigners in 2022 increased by 26.10% compared to 2021. Based on the three-year period, housing sales to foreigners in 2022 increased by 62.18% compared to 2020. As it can be understood, the acquisition of housing by foreigners in Türkiye continues to increase with each passing year.



2 fig. Provinces where foreigners buy the most housing in Türkiye (2021-2022)
Source: TÜİK (2023).

According to figure 2, which shows the provinces in which foreigners prefer to buy a house in the last two years (2021-2022), Istanbul ranks first among the provinces where foreigners want to own a house. It is seen that foreigners have purchased a total of 46,154 houses from Istanbul in 2021 and 2022. After Istanbul, foreigners preferred Antalya with 29,952 housing purchases to own a house. Mersin is in the third place in housing purchase preference with 5,866 houses sold. In addition to these three provinces, Ankara, Yalova, Bursa, İzmir, Trabzon, Muğla and Aydın are the most preferred provinces. Apart from these provinces, a total of 10,209 housing purchases were made by foreigners in a two-year period from different provinces in Türkiye. The fact that Istanbul, Türkiye's commercial and financial centre, is a historical and global city, is just a few of the reasons why it ranks first in the list of cities most preferred by foreigners for housing purchases. Topkapı Palace Museum, Hagia Sophia Mosque and its Affiliates, Hagia Irene Church, Imrahor Monument, Chora Museum (Khora Church), Yedikule Fortress Museum, Dolmabahçe Palace, Yıldız Palace, Beylerbeyi Palace, Küçüksu Summer Palace, Ihlamur Summer Palace, Basilica Cistern, Hisarlar Museum (Rumelia) and Beylerbeyi), Suleymaniye Mosque, Blue Mosque and Square (Dursun, 2010), having many different business, financial and entertainment centers, geopolitically the junction point of the Asian and European continents and a city with straits. Many factors make Istanbul preferable for foreign citizens, such as its location, airports that allow transportation to different countries of the world and being a global city.

Especially Russian citizens prefer Antalya. So much so that, in their study, Deniz and Özgür (2010, p. 19) found that economic-based conditions, such as higher working wages, better working environment and conditions, and lower cost of living, are decisive for Russians to choose Antalya. is happening. Again, marriage with Turkish citizens, better social life, being close to Russia, mild climate and geographical features are other reasons that make Antalya attractive for Russian citizens. Similarly, the fact that Antalya is a temperate seaside province and a brand city suitable for sea tourism is another reason that attracts people from many different countries, especially citizens of northern countries.

1 table. Number of housing sales to foreigners by nationality in Türkiye (2021-2022)

No.	Nationality	2021	2022	Total	Change Range, %
1	Poland	154	277	431	79,87
2	Russia	5379	16312	21691	159,95
3	Iran	10056	8223	18279	**18,22** (-)
4	Iraq	8661	6241	14902	**27,94** (-)
5	Germany	2358	2705	5063	14,71
6	Kazakhistan	2090	2702	4792	29,28
7	Afghanistan	2762	1732	4494	**37,29** (-)
8	Ukraine	1246	2574	3820	106,58
9	Kuwait	1671	1791	3462	7,18
10	Azerbaijan	1517	1330	2847	**12,32** (-)
11	USA	1416	1329	2745	**6,14** (-)
12	Yemen	1332	1202	2534	**9,75** (-)
13	Palestine	1296	1145	2441	**11,65** (-)
14	England	1089	1236	2325	13,49
15	Egypt	1166	1115	2281	4,37 (-)
16	China	963	1179	2142	22,42
17	Saudi Arabia	557	1090	1647	95,69
18	Sweden	850	732	1582	**13,88** (-)
19	Canada	567	760	1327	34
20	Algeria	636	672	1308	5,66
21	Other	13396	13983	27379	4,38
TOTAL		**59162**	**68330**	**127492**	**15,49**

Source: TÜİK (2023).

According to 1 table, which shows the highest number of housing purchases by nationality in the last two years (2021-2022) in Türkiye, Iranian, Iraqi, and Russian citizens are in the top three ranks. Apart from the citizens of this country, the citizens of Afghanistan, Germany, Kazakhstan, Azerbaijan, USA, Yemen, Palestine, Ukraine, Jordan, Egypt, England, Pakistan, Canada, Saudi Arabia, Turkmenistan, and Uzbekistan also rank high in the purchase of housing in

Türkiye. So much so that, in the last two years, 18,403 houses were sold from Türkiye to Russian citizens. The number of house sales to Iranian citizens is 16,142. In 2021 and 2022, a total of 13,518 houses were sold to Iraqi citizens, who are in the third place in housing purchases.

When the reasons affecting the immigration of Iranian citizens to Türkiye and their housing purchases are examined, the change made in the implementation of the Turkish Citizenship Law with the decision dated 19.09.2018 and numbered 106 has been an important factor. The requirement to make a fixed capital investment of the minimum amount of 2,000,000 USD in the amount of investment for the citizenship of the Republic of Türkiye has been reduced to 500,000 USD, the minimum amount of 1,000,000 USD is the immovable amount of 250,000 USD or TL/Foreign Currency, employment for at least one hundred people The condition for creating the area was reduced to fifty people. Policies that facilitate this citizenship process have been an important factor supporting the migration of Iranian citizens to Türkiye. Similarly, the adoption of a semi-open society approach in Iran, irregularity in economic conditions, and problems in the education system are other reasons that push Iranians to Türkiye. When the other characteristics of Türkiye that make Iranians attractive are examined, it can be said that first, it is a neighbouring country, then the Turkish society is an open society, the economic conditions are generally stable compared to Iran, the positive effect of student tourism and the media on the Iranian people play an important role in this process (Ghanbarlou and Shelter, 2022; Star and Hard, 2022). Iraqi citizens, on the other hand, have experienced long-term effects of war (such as the Gulf War and the US military intervention), internal conflict, political instability, terrorism, etc. It is experiencing a migration process in which Türkiye, which is an emigrant and neighbouring country, is preferred for reasons. In addition, the presence of people of Turkmen origin in Iraq and their preference for Türkiye as a related community can be seen as another important reason. In general, when the touristic trips from the Middle East to Türkiye are observed, the interest in the natural beauties (waterfall, lake, plateau, canyon, forest, etc.) in cities such as Trabzon, Yalova, Bursa draws attention. It is possible to see people coming from the Middle East geography who prefer to buy and live in cities with these characteristics. So much so that when we look at the foreigners who prefer Trabzon, Bursa and Yalova, it is seen that people of Arab origin predominate. In particular, the interest in Yalova has been going on for years.

2 table. Foreign population in the provinces most preferred by foreigners in Türkiye (2020-2021)

Provinces		2020			2021			Increase Rate, %
		Total	**Male**	**Female**	**Total**	**Male**	**Female**	
1	İstanbul	**450 584**	226 213	224 371	**740 954**	373 124	367 830	**64**
2	Ankara	**156 536**	75 571	80 965	**173 264**	81 706	91 558	**10,6**
3	Antalya	**94 294**	37 911	56 383	**136 946**	55 726	81 220	**45**
4	Bursa	**44 586**	22 291	22 295	**54 276**	26 679	27 597	**21,7**
5	Samsun	**28 204**	14 313	13 891	**39 912**	20 335	19 577	**41,5**
6	Mersin	**28 782**	15 018	13 764	**39 172**	20 407	18 765	**36**
7	İzmir	**29 672**	12 152	17 520	**34 733**	14 508	20 225	**17**
8	Yalova	**22 926**	11 842	11 084	**31 100**	15 699	15 401	**35,6**
9	Konya	**25 636**	14 131	11 505	**30 486**	16 725	13 761	**18,9**
10	Sakarya	**24 785**	12 766	12 019	**28 086**	14 462	13 624	**13**
11	Eskişehir	**23 517**	12 212	11 305	**26 362**	13 779	12 583	**12**

12	Muğla	**19 614**	8 040	11 574	**22 547**	8 968	13 579	**14,9**
13	Kayseri	**18 514**	9 556	8 958	**20 859**	10 762	10 097	**12,6**
14	Gaziantep	**15 362**	8 804	6 558	**18 020**	10 007	8 013	**17,3**
15	Aksaray	**14 810**	8 099	6 711	**17 436**	9 856	7 580	**17,7**
16	Trabzon	**12 625**	6 516	6 109	**14 333**	7 335	6 998	**13,5**
17	Aydın	**10 330**	4 344	5 986	**12 090**	5 098	6 992	**17**
18	Balıkesir	**10 503**	5 041	5 462	**11 991**	5 922	6 069	**14**
19	Bolu	**10 174**	5 413	4 761	**11 077**	5 940	5 137	**8,9**

Source: TÜİK (2023).

Table 1, which was created according to TUIK (2021) data, shows the one-year change in the number of foreigners in some provinces with foreign population density in Türkiye. When the foreign population growth rates in the provinces are analysed, Istanbul ranks first with an increase of 64%, while Antalya ranks second with an increase of 45%. Samsun is in the third place with an increase of 41.5%, Mersin is in the fourth place with an increase of 36%, Yalova is in the fifth place with an increase of 35.6%, and Bursa is in the sixth place with an increase of 21.7%. The foreign population, which was 450,584 in 2020, increased to 740,954 in 2021, the foreign population, which was 94,294 in Antalya, to 136,946, the foreign population of 28,204 in Samsun to 39,912, the foreign population of 28,782 in Mersin to 39,172 and Yalova. The foreign population, which was 22,926 in Türkiye, increased to 31,100, and the foreign population in Bursa, which was 44,586, increased to 54,276. The capital Ankara, on the other hand, is home to a high amount of foreign population, such as 173,264, although there is an increase of 10.6% in the number of foreign populations.

3 table. Last four-year change in housing price indices in regions with the most foreigners in Türkiye

Region Code (Provinces)	Period (Year / Month)				
	2019/1	**2020/1**	**2021/1**	**2022/1**	**2023/1**
TR10 (İstanbul)	100,2	107,4	137,2	252	641,1
TR51 (Ankara)	104	116,7	150,8	261,9	672,6
TR31 (İzmir)	111	127,3	168,3	291,4	728,2
TR61 (Antalya, Burdur, Isparta)	111,5	133,5	190,9	363	1.072
TR32 (Aydın, Denizli, Muğla)	115,4	132,3	188,2	368,1	917,8
TR42 (Bolu, Kocaeli, Sakarya, Yalova, Düzce)	108,2	119,6	149	252,4	667,4
Türkiye (General)	**107,6**	**120,9**	**157,7**	**279,9**	**708,3**

Source: TÜİK (2023).

According to Table 3, which was created based on the first months of the last four years and shows the change in the housing price index in foreign dense regions in Türkiye, the highest increase was in the TR61 coded region covering the provinces of Antalya, Burdur and Isparta. In this region, especially after 2022, a leap was experienced within a year, and an increase of 195.31% was realized in the housing price index. Again, in this region, the rate of change in the last four years was 861.43%. Another region where housing prices have increased similarly is the TR32 (Muğla, Aydın, Denizli) coded region that includes Muğla and Aydın, which is an important tourism city like Antalya. In this region, the one-year change in the housing price index after 2022 has been an increase of 149.33%. The four-year rate of change in this region is an increase of 695.32%. It would not be wrong to say that the main basis of this situation is the war between Russia and Ukraine, which started in February 2022. So much so that, as of February 2022, many people from both Russia and Ukraine came to Türkiye and preferred to settle in cities suitable for summer tourism such as Antalya and Muğla. While the housing price index in İzmir, which is an industry and tourism city, was 111 in 2019, it became 728.2 with an increase of 556.03% in 2023. In Istanbul, which is a city of finance, industry, commerce and tourism, the housing price index increased from 100.2 in 2019 to 641.1 in 2023 with an increase of 539.82%. The housing price index of the TR42 coded region (Bolu, Kocaeli, Sakarya, Yalova, Düzce), which includes the province of Yalova, which is frequently preferred by people from the Middle East geography, increased from 108.2 in 2019 to 667.4 in 2023 with an increase of 516.82%. While the overall housing price index in Türkiye was 107.6 in 2019, it increased to 708.3 with an increase of 558.27% in 2023. As seen in Table 1, there has been a high increase in the number of Russian citizens purchasing real estate from Türkiye in 2022. While the number of Russian citizens purchasing real estate from Türkiye was 5379 in 2021, this number increased to 16312 in 2022. When Graph 2, which shows the number of real estates purchased by provinces, is examined, the most residences were purchased from Istanbul, while Antalya was the second province with the highest number of residences. Therefore, these figures make the high increase in the housing price index especially in the TR61 coded region, which includes the province of Antalya, meaningful.

FOREIGNIZATION AS A DIFFERENT KIND OF GENTRIFICATION

The concept of urban gentrification expresses a spatial and social transformation process depending on the financial income of the people. Gentrification, which emerged because of an urban spatial upper income orientation, is a dynamic process that is frequently seen especially in metropolitan cities. Although this transformation process generally points to a change caused by the internal dynamics of the society, the main idea mentioned in this study is the possibility of foreign citizens to create a socioeconomic and cultural transformation in a city, as well as the internal dynamics of the society. For this reason, "alienation as a different type of gentrification" has been preferred for this section title. Since the beginning of the 2000s, the interest of some EU citizens in Türkiye has started to increase in terms of property ownership and accommodation (permanent or temporary). There are general factors such as common religious and cultural values, geographical location (proximity), healthy and social cities, and lower geopolitical risks that affect decisions such as moving to a place abroad / buying a house (Yanar and Demir, 2022, p. 297). In addition to all these factors, reasons such as housing prices being cheaper in Türkiye compared to other European countries, harmonization policies in Türkiye during the EU accession process in the early 2000s, and the positive developments that followed increased the retirement migration from Europe to Türkiye. As another reason, the title deed law, which was put into effect in 2003 allowing foreigners to acquire property in Türkiye, also increased the migration movements to Türkiye (Karakaya and Turan, 2006, p. 5). In addition, the decrease in the real effective exchange rate causes a decrease in the prices of the houses in terms of foreign currency. Accordingly, the housing demand of foreigners is also increasing. Especially due to the exchange rate fluctuations experienced in Türkiye in recent years, the advantage of selling houses to foreigners in terms of foreign exchange income has increased the sales of houses to foreigners. Another issue that has been discussed about the sale of housing to foreigners in Türkiye is the process of granting citizenship to foreigners in return for the purchase of housing in 2018. As a result of their research, Yanar and Demir (2022, p. 308) determined that the policy of granting citizenship in exchange for the purchase of housing did not cause a significant break in the sale of housing to foreigners. According to this study, the main factor affecting the housing purchases of foreigners is the exchange rate. Many different reasons such as the development of transportation opportunities to the provinces preferred by foreigners in Türkiye, positive developments in the accommodation and tourism sector in Türkiye due to globalization, facilitating regulations for the legal rights of foreigners, and the fact that life is cheaper in Türkiye compared to EU countries. It makes sense of foreign migration to Türkiye. Even if the effects of the increase in foreign migration are not felt much throughout the country, when the process is considered on the basis of a city or region, the increase in foreign migration makes itself felt in many areas, especially in economic and social life in the relevant region. According to the research conducted by Ünlü Öztürk and Yılmaz Bayram (2021, p. 192) on the city of Trabzon, which is especially preferred by the Arabs, regarding the economic effects of the purchase and settlement of housing by foreigners in a city, the housing demand of foreigners causes an increase in the housing prices in that city, and the local people Due to the decrease in purchasing power, the people are adversely affected by this situation. As can be seen in other provinces where foreign demand is intense, incomes based on tourism are decreasing in the region. Foreigners who own a house stay in their own houses when they come to the city, and when they return to their country of origin, they rent out their houses. Therefore, they negatively affect the tourism economy in the region. Similarly, the increase in migration to a city or a region within the city creates a need for new housing in addition to the current housing need. In this case, there is an increase in housing demand, sales, and prices due to immigration. The excessive increase in housing prices affects people in the lower- and middle-income groups negatively. Increases in housing prices and rents will naturally put people who want to buy a new house into a difficult situation (Kangallı Uyar and Kılıç, 2017, p. 294; Karakaya and Turan, 2006, p. 12). Similarly, Şanlı and Peker (2023, p. 56) emphasize in their research that the fluctuation in the exchange rate increases the sales of housing to foreigners, while the interest rate affects housing sales negatively. Despite the inflationary pressure arising from the exchange rate in Türkiye, the increase in housing demand and sales is also caused by foreigners.

According to the results of Kangallı Uyar and Kılıç's (2017) research, due to the high profit margin of construction companies for the sale of residences to foreigners, the tendency to housing supply for people in the upper income group and the purchase of more housing than they need for investment purposes affect the prices. and makes it difficult for those who demand housing to meet their demand. Therefore, it is possible that a process in which people from the upper income group can own a house, but people from the middle- or lower-income group have difficulty in buying a house is likely to emerge. In the study of Baltacı (2011, p. 132), who conducted research on Alanya, an important tourism city in Türkiye, regarding the impact of foreigners on the local people, it was found that the increase in interaction with foreigners who own a home weakens the local people's commitment to moral values, It has been found that there has been an increase in protests, an increase in admiration for foreign cultures, deterioration in music culture, deterioration in the daily spoken language of the local people and in family life, an increase in alcohol consumption, a change in the style of dressing and a negative understanding of marriage. As a result of the research carried out by TÜBİTAK (2008), it was stated that the local people had concerns about foreigners who bought a house, that they might claim rights on the lands over the real estate they own after a while, have a say in the administration and engage in missionary activities. Considering all these social and economic effects that have occurred or are expected to occur in Türkiye, it is not wrong to say that foreigners affect the urban spaces they penetrate and have the potential to create a new settled culture in these spaces. The increase in the cost of living in areas that are attractive and frequently preferred by foreigners may adversely affect the local people. It is an expected situation that these people will abandon their long-standing order through the sale of housing or land and move to other parts of the city.

DISCUSSION

The exploration of urban gentrification through the lens of foreignization in this study has provided a fresh perspective on the complex dynamics shaping cities, particularly within the context of Türkiye. The departure from traditional definitions of gentrification to focus on the indirect displacement of residents due to foreign density represents a noteworthy contribution to the scholarly discourse. The examination of the consequences of international migration on urban dynamics, as conducted within the unique context of Türkiye, offers valuable insights into the transformative impact of foreign nationals on cities.

The study's use of quantitative data is a strength, providing a systematic and empirical basis for evaluating the effects of foreignization on urban areas. The comprehensive analysis of demographic, economic, social, and cultural aspects has revealed a profound metamorphosis in Türkiye's cities. The concentration of foreign citizens has not only influenced the physical landscape but has also contributed to a nuanced shift in the very fabric of urban life. This dynamic, coined as "foreignization," represents a distinctive form of gentrification, encapsulating the intricate interplay between international migration and urban transformation.

The coined term "foreignization" not only captures the essence of the study's findings but also introduces a conceptual framework that enriches the understanding of the nuanced mechanisms driving urban change. This novel perspective broadens the discourse on gentrification by recognizing the indirect displacement of local citizens, offering a conceptual tool to analyse and discuss similar phenomena in different contexts.

The study, however, could benefit from further contextualization of the term "foreignization" within the broader urban studies literature. A discussion of how this concept aligns with or diverges from existing gentrification theories would enhance the theoretical underpinning of the study. Additionally, the implications of foreignization on issues of social justice, identity preservation, and community engagement should be explored to provide a more comprehensive understanding of the phenomenon.

In conclusion, this study's unique perspective on urban gentrification, presented through the lens of foreignization, contributes significantly to the scholarly discourse. The findings offer a nuanced understanding of the transformative effects of foreign immigration on Türkiye's cities, providing a foundation for further research and policy considerations in urban planning.

In conclusion, migration and gentrification processes can lead to feelings of alienation among urban residents, migrants, and foreign elites. The topics discussed in this article are critical considerations in urban planning and policymaking. To mitigate inequalities and discrimination, it is crucial to design and implement urban projects that encompass all segments of society. Additionally, an equitable and inclusive education system can facilitate better understanding among diverse societal groups and foster a stronger connection to the city. It is imperative to remember that foreigners' migration not only changes the identity of population but also reshapes social relationships, carrying the risk of alienation.

The examination of urban gentrification from the vantage point of foreignization within this study unfolds a compelling narrative of the intricate dynamics that mold cities, particularly within the distinctive landscape of Türkiye. The deliberate departure from conventional gentrification definitions to emphasize the indirect displacement of residents due to foreign density marks a notable scholarly contribution. The study's scrutiny of the repercussions of international migration within the Türkiye context unravels crucial insights into the profound transformations wrought by foreign nationals on urban environments.

A notable strength lies in the study's adept use of quantitative data, offering a structured and empirical foundation to assess the impacts of foreignization on urban areas. The comprehensive analysis traversing demographic, economic, social, and cultural dimensions illuminate a profound metamorphosis within Türkiye's urban spaces. The influx of foreign citizens not only alters the physical landscape but also orchestrates a nuanced evolution in the very essence of urban life. This dynamic, aptly termed "foreignization," encapsulates a distinctive form of gentrification, portraying the intricate interplay between international migration and the broader panorama of urban transformation.

The coined term "foreignization" stands as more than a descriptor; it introduces a conceptual framework that enriches our comprehension of the nuanced mechanisms steering urban change. This innovative perspective widens the discourse on gentrification by acknowledging the indirect displacement of local citizens, furnishing a valuable conceptual tool applicable to similar phenomena across diverse contexts.

However, to augment the theoretical foundation, the study would benefit from a deeper contextualization of the term "foreignization" within the broader urban studies literature. A nuanced discussion on how this concept aligns with or diverges from established gentrification theories would further fortify the theoretical underpinnings. Additionally, exploring the implications of foreignization on issues of social justice, identity preservation, and community engagement would furnish a more holistic understanding of this phenomenon.

In conclusion, this study's distinct lens on urban gentrification through foreignization emerges as a substantial contribution to scholarly discourse. The nuanced findings provide a profound understanding of the transformative effects of foreign immigration on Türkiye's urban landscape, establishing a robust foundation for subsequent research endeavours and policy considerations in the realm of urban planning.

Gentrification is an integral facet of urban transformation, significantly influencing the trajectory of cities. It is essential to acknowledge the dual nature of this process, encompassing both positive and negative outcomes. Central to effective management and policymaking concerning gentrification are considerations of social justice and the preservation of local identities. Achieving sustainable urban development necessitates leveraging the positive aspects of gentrification while mitigating its adverse effects and ensuring active participation from the local populace.

Urban transformation and gentrification involve intricate social and cultural dynamics, potentially giving rise to feelings of alienation among diverse urban residents, including locals, migrants, and foreign elites. In crafting urban policies, planners must conscientiously address the needs and expectations of all societal segments. In order to prevent disparities and discrimination, urban development initiatives should be designed to inclusively engage a diverse population. Moreover, a fair and inclusive education system, with a specific focus on the education of migrant urban dwellers and other marginalized groups, is imperative. This comprehensive approach is crucial for transforming urban processes into a cohesive force that strengthens the city's identity and social bonds.

Türkiye has experienced a prolonged inflow of immigrants from various countries, driven by factors such as its geographical location, favorable climate, tourist-friendly environments, and a lower cost of living compared to European nations. Notably, certain cities, including Istanbul, Antalya, Muğla, Yalova, Trabzon, Izmir, and Mersin, have witnessed substantial foreign migration. This influx, particularly from Europe and the Middle East, has yielded socio-economic effects in cities with dense foreign populations.

The impact is palpable, ranging from housing dynamics, including rising rents and sales prices, to transformations in the construction and real estate sectors tailored to foreign interests. While not entirely fitting the traditional concept of urban gentrification, this phenomenon aligns more closely with the concept of foreignization—a unique type of gentrification. The prolonged nature of this trend, coupled with developments in neighbouring countries and recent exchange rate fluctuations, suggests a continued and escalating influence of foreigners, especially resident foreigners, on Türkiye's housing market and cities.

In conclusion, the intertwining processes of migration and gentrification can breed feelings of alienation among urban residents, migrants, and foreign elites. The considerations discussed herein are paramount in the realms of urban planning and policymaking. To combat inequalities and discrimination, urban projects must be thoughtfully devised to encompass the entire spectrum of society. A fair, inclusive education system is instrumental in fostering understanding and connection among diverse societal groups. It is crucial to recognize that foreign migration not only alters the identity of the population but also reshapes social relationships, carrying the inherent risk of alienation.

CONCLUSIONS

1. Gentrification is a significant aspect of the urban transformation process, impacting the future of cities. It is important to remember that this process has both positive and negative effects. Issues of social justice and identity preservation are crucial in the management and policymaking related to gentrification. To promote sustainable urban development, it is important to preserve the positive aspects of gentrification while minimizing its negative impacts and ensuring the participation of the local population. Urban transformation and gentrification processes entail social and cultural interactions that can lead to feelings of alienation among urban residents, including locals, migrants, and foreign elites. Therefore, in urban planning and policymaking, the needs, and expectations of all segments of society should be considered. To prevent inequalities and discrimination, urban transformation projects should be designed and implemented to encompass diverse segments of the population. Additionally, the education system should be fair and inclusive for everyone, with special attention to the education of migrant urban dwellers and other disadvantaged groups. Only in this way can urban transformation processes become a strengthening factor for the city's identity and social bonds.
2. Türkiye has been receiving immigration from many different countries for years. While most of these migrations are short-term, some of them are long-term or permanent. Many different reasons, such as Türkiye's geographical location, mild climate, having seas suitable for summer tourism, and lower cost of living compared to European countries, form the basis of these migrations. Some features of cities are determinant in domestic migration as well as in foreign migration. There are many factors affecting the choice of city in foreign migration, especially the features suitable for tourism, economic and social conditions, transportation facilities, seasonal and topographic features. Many provinces in Türkiye, especially Istanbul, Antalya,

Muğla, Yalova, Trabzon, Izmir and Mersin, are under intense foreign migration. When the countries of origin of foreign migration are examined, it is seen that people from many countries of Europe and the Middle East, especially Russia and Ukraine, prefer Türkiye. It is possible to talk about a socio-economic effect in cities with dense resident foreigners. While this influence manifests itself on the basis of housing ownership, it can evolve into an ongoing process as the local people's exclusion from some places depending on the density of foreigners. In particular, the amount of increase in housing rents or sales prices can reach a level that does not correspond to the purchasing power of the local people. Similarly, the fact that the construction and real estate sectors carry out foreign-oriented studies changes the cultural and socio-economic appearance of the urban space, which has a high foreign demand. It is possible to say that this situation, which does not fully meet the concept of urban gentrification, can correspond to the concept of foreignization as a different type of gentrification. Although this situation has been going on for years in Türkiye, it continues rapidly due to the developments in the surrounding countries and the exchange rate in recent years. It is expected that the impact of foreigners and especially resident foreigners on the housing market will increase, especially the socio-economic impact of the foreigners on the cities, as it is possible that the foreign migration to Türkiye will continue, and the foreign population will increase in the following years.

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ASMENS SVEIKATOS PRIEŽIŪROS PASLAUGŲ KOKYBĖS ĮVERTINIMAS PASLAUGŲ GAVĖJŲ POŽIŪRIU

ASSESSMENT OF THE QUALITY OF HEALTHCARE FROM THE PERSPECTIVE OF HELTHCARE SERVICE RECIPIENTS

VILJARAS REIGAS
SMK University of Applied Sciences, Lithuania

Annotation

This study evaluated the Experience of persons receiving Healthcare services in healthcare institutions and the Factors that determine the choice of service recipients to choose a Healthcare institution. The study was conducted in primary and secondary level Healthcare institutions that provide outpatient consultation of Family medicine and Physicians. The Results of the Study revealed that only every second recipient of healthcare services is satisfied with the Quality of services received.

Keywords: *healthcare services, satisfaction*

Keywords:

Anotacija

Šiuo tyrimu vertinta asmens sveikatos priežiūros paslaugas gavusių asmenų patirtis asmens sveikatos priežiūros įstaigose bei veiksniai, kurie lemia paslaugų gavėjų pasirinkimą rinktis asmens sveikatos priežiūros įstaigą. Tyrimas buvo atliktas pirminio ir antrinio lygio asmens sveikatos priežiūros įstaigose, kuriose teikiamos šeimos medicinos ir gydytojų specialistų ambulatorinės konsultacijos paslaugos. Tyrimo rezultatai atskleidė, kad tik kas antras asmens sveikatos priežiūros paslaugų gavėjas yra patenkintas gauta paslaugų kokybe.

Raktiniai žodžiai: *sveikatos priežiūros paslaugos, pasitenkinimas*

ĮVADAS

Tyrimo aktualumas ir problema. Asmens sveikatos priežiūros paslaugos, nors ir pasižyminčios savo specifiškumu, jautrumu ir veiklos tikslu, gali būti vadinamos „verslu". Tą pagrindžia įvairūs elementai, kurie yra būdingi ne tik sveikatos, bet ir kitų sektorių teikiamoms paslaugoms ar produkcijai. Holmlund (2008), analizuodama verslo paslaugų kokybė, tokiais elementai įvardija darbuotojus, strategiją, tikslus, išteklius, Pettinger‘is (2016) nurodo visuomenę, kultūrinius elementus, siekiamybes, o Kibassa‘as (2012) akcentuoja poveikį aplinkai, pelno siekiamybę, atsakomybę prieš kitus. Asmens sveikatos priežiūros paslaugos pasižymi tokiais pačiais arba panašiais elementais, nes kiekvienai asmens sveikatos priežiūros įstaigai yra svarbu išlikti rinkoje, būti konkurencingai, užtikrinti paslaugų kokybę, pritraukti naujus paslaugų gavėjus, užtikrinti tinkamas darbo sąlygas, veiklą vykdyti vadovaujantis strategija. Tačiau priešingai nei kiti veiklos sektoriai, asmens sveikatos priežiūros įstaigoms, dėl savo specifiškumo, yra keliami atidumo ir rūpestingumo reikalavimai, kurių reikalavimas yra perkeliamas į teisės aktus ir įstaigos privalo užtikrinti teikiamų paslaugų kokybę. Lietuvoje asmens sveikatos priežiūros paslaugų kokybės vertinimą yra pavesta atlikti Valstybinei akreditavimo sveikatos priežiūros veiklai tarnybai prie Sveikatos apsaugos ministerijos, kurios 2021 metų veiklos ataskaitoje nurodoma, kad pacientų skundų skaičius dėl galimai nekokybiškai suteiktų paslaugų nuolat auga, t. y. 2015 metais ši tarnyba gavo 333 pranešimus, o 2021 metais tokių pranešimų jau buvo užregistruota 493. Kaip matyti iš gautų duomenų, asmens sveikatos priežiūros paslaugų kokybės užtikrinimo problema visuomenėje yra aktuali ir vis didėjanti.

Tyrimo tikslas. Atsižvelgiant į problemos aktualumą ir mastą šiam tyrimui iškeltas tikslas – išanalizuoti asmens sveikatos priežiūros paslaugų gavėjų patirtį ir veiksnius, lemiančius asmens sveikatos priežiūros paslaugų tiekėjo pasirinkimą.

Tyrimo metodologija. Tyrimas atliktas licencijuotose asmens sveikatos priežiūros įstaigose, kuriose teikiamos pirminio ir antrinio lygio asmens sveikatos priežiūros paslaugos. Tyrimui atlikti parengta Asmens sveikatos priežiūros paslaugų kokybės patirties vertinimo anketa, sudaryta iš 33 klausimų, kuriais analizuojama tyrimo dalyvių patirtis apie paskutinį lankymąsi asmens sveikatos priežiūros įstaigoje ir veiksnius, lemiančius asmens sveikatos priežiūros įstaigos pasirinkimą. Tyrimo metu apklausti 718 tyrimo dalyvių.

Tyrimo rezultatai. Tyrimo rezultatai atskleidė, kad kas antras tyrimo dalyvis yra nepatenkintas arba patenkintas tik iš dalies gautų asmens sveikatos priežiūros paslaugų kokybe, kas šeštas tyrimo dalyvis mokėjo už pasirinktas asmens sveikatos priežiūros paslaugas, rinkdamiesi gydymo įstaigą tyrimo dalyviai akcentavo įstaigos lokalizaciją (buvimą arčiau gyvenamosios vietovės) bei atsiliepimus apie paslaugas teikiančius asmens sveikatos priežiūros specialistus. Tyrimo rezultatai taip pat atskleidė, kad miesteliuose ir kaimo vietovėse gyvenantys gyventojai apie įstaigoje teikiamų paslaugų kokybę vertinti linkę spręsti iš įstaigos darbuotojų bendravimo su paslaugų gavėju ir neakcentuoja ar įstaigoje yra įdiegta kokybės vadybos sistema.

Tyrimo originalumas/tyrimo vertė. Atliktas tyrimas leidžia įvertinti paslaugų kokybę veikiančių elementų pasirinkimą asmens sveikatos priežiūros įstaigose paslaugų gavėjų požiūriu. Vadovaudamiesi šiuo tyrimu asmens sveikatos priežiūros įstaigų darbuotojai, atsakingi už kokybės tobulinimą įstaigose, gali atlikti kokybės strategijų tobulinimus. Šis tyrimas pasižymi ribotumu – apklausti tik vieno Lietuvos regiono gyventojai, todėl tikslinga išplėsti tyrimo imtį į kitus regionus.

TEORINIS PAGRINDIMAS

Sveikatos priežiūros paslaugų kokybės tyrimai yra dažnas socialinių ir biomedicininių tyrimų objektas. Pagrindinės priežastys, kurios, anot Kumah ir kt. (2020) verčia tobulinti sveikatos priežiūros paslaugų kokybę yra sveikatos priežiūros iššūkiai, tokie kaip didėjančios sveikatos priežiūros sąnaudos, mažėjantys ištekliai, augantys pacientų lūkesčiai, perėjimas nuo kiekybinių prie kokybinių matmenų, kompleksinės pagalbos poreikis.

Tiek Pasaulio sveikatos organizacija, tiek Europos Komisija, tiek tyrėjai pateikia įvairias „*sveikatos priežiūros paslaugų kokybės*“ sampratas. Oficiali ir dažnai moksliniuose tyrimuose bei tarptautinės politikos dokumentuose pateikiama „*sveikatos priežiūros paslaugų kokybės samprata*“ nurodo laipsnį, kuriuo asmenims ir gyventojams teikiamos sveikatos priežiūros paslaugos, atsižvelgiant į moksli pažangą, padidina pageidaujamų sveikatos priežiūros rezultatų tikimybę (Kavitha, 2023). Atkreiptinas dėmesys į tai, kad sveikatos priežiūros paslaugos, anot Flodgren‘o ir bendraautorių (2016) turi pasižymėti tokiomis savybėmis kaip veiksmingumas, saugumas, teisingumas, savalaikiškumas, integracija, orientuotos į asmenį.

Tam, kad gerinti sveikatos priežiūros paslaugų kokybę, teisės ekspertai, vadybininkai, mokslininkai ir kiti suinteresuoti asmenys kuria strategijas, intervencijas ir sistemas, orientuotas į teikiamų paslaugų kokybės gerinimą. Mokslinės literatūros šaltiniuose apstu nuorodų į ISO standartus, Baldrige programą, LEAN metodiką, Naujojo viešojo valdymo modelį, Visuotinę kokybės vadybą ir pan. Kaip matyti iš pateiktų šaltinių analizės, šios strategijos, skirtos asmens sveikatos priežiūros paslaugų kokybės gerinimui, gali būti skirstomos į sistemines, organizacines ir individualias (Gopal ir kt., 2019; Doran ir kt., 2017; Flodgren ir kt., 2016; Holmlund ir kt., 2008).

Tarp įvairių literatūros šaltinių galima aptikti ir duomenų apie visuotinės kokybės vadybos poveikį asmens sveikatos priežiūros paslaugų kokybei. Kai kuriuose iš šių tyrimų (Ferdousi ir kt., 2018; Dabboor ir kt., 2021) pateikiama informacija apie šio kokybės gerinimo metodo ir sveikatos priežiūros paslaugų sektoriaus plėtros sąsajas, tačiau randama nedaug duomenų apie poveikį sveikatos priežiūros paslaugų kokybei (Murray, 2017). Kai kuriuose tyrimuose teigiama, kad visuotinės kokybės vadybos priemonė paveikia organizacijų infrastruktūra, sąnaudas, paslaugų kokybę (Balasubramanian, 2016), taikant šią priemonę būtiną sutelkti dėmesį į teikiamas paslaugas, vadovavimo stilių, paslaugų teikimo organizavimą (Turkyilmaz ir kt., 2015) bei kasdienų užduočių įgyvendinimą (Rouf ir kt., 2017).

Analizuojant strategijų, kurios skirtos sveikatos priežiūros kokybei gerinti taikymo galimybes, randama duomenų, kad esminiai akcentai šiose strategijose yra orientuoti į organizacijos lankstumą, atskaitomybę, modernizavimą, strateginį valdymą, efektyvumo didinimą, rodiklių ir tikslų apibrėžimą bei analizę, rezultato vertinimą, komandų, išlaidų ir sąnaudų valdymą. Įvertinus šiose strategijose randamas priemones tikslinga paminėti pagrindines – aktyvus pacientų įtraukimas į sprendimus dėl sveikatos priežiūros paslaugų teikimo (Kumah ir kt., 2020), sveikatos politikos nustatymas, išteklių valdymas, pagarbos paciento teisėms užtikrinimas, infekcijų kontrolės priemonių taikymas, nuolatinės kokybės tobulinimo siekis, vadovybės įsipareigojimų užtikrinimas, informacinių sistemų valdymas (Nair ir kt., 2023), holistinio požiūrio siekiamybė, kokybės kultūros skatinimas, suinteresuotų šalių įtraukimas, patirties sklaida (Awang ir kt., 2023), sveikatos priežiūros paslaugų teikimo išeičių analizė (Shortell ir kt., 2023).

Organizacijai tinkamos kokybės gerinimo strategijos parinkimas reikalauja išsamios situacijos analizės, kurios metu vertinami tiek išoriniai, tiek vidiniai organizacijos veiksniai. Vieni iš vidinių organizaciją veikiančių yra sveikatos priežiūros rezultatai. Pavyzdžiui, Swathi su kolegomis (2023) nurodo tiesiogines koreliacijas tarp teikiamų paslaugų kokybės, pacientų pasitenkinimo ir sveikatos priežiūros paslaugų rezultatų, Trowman su bendraautoriais (2023) akcentuoja sąsajas tarp aukštesnio pasitenkinimo gautomis sveikatos priežiūros paslaugomis ir taikomos informacinių technologijų plėtros organizacijoje, Jakab ir kt. (2023) dėmesį atkreipia į teigiamas sąsajas tarp paslaugų kokybės ir pacientų įtraukimo į sveikatos technologijų vertinimą, Quigley su bendraautoriais (2023) nustatė, kad paslaugų vertinimas pagerėjo komunikacijai su pacientais skyrus daugiau laiko nei įprasta ir vartojant pacientams suprantamus terminus, Reiling ir kt. (2008) nurodo teigiamą pacientui priimtinos aplinkos gydymo įstaigoje poveikį sveikatos priežiūros rezultatams, Kumah‘as su bendraautoriais (2020) akcentuoja teigiamą mokymo poveikį.

Kaip matyti iš literatūros šaltinių analizės, tiek privačios, tiek ir viešosios sveikatos priežiūros organizacijos senai skiria didelį dėmesį teikiamų paslaugų kokybei (Bahladhare, Rishipathak, 2023). Atsižvelgiant į jau atliktų tyrimų duomenis galima daryti prielaidą, kad domėjimasis sveikatos priežiūros kokybe yra sietinas su sveikatos priežiūros paslaugų kokybės gerinimo standartų tiesioginiu poveikiu populiacijos sveikatai, o nuoseklumas, pasiekti pageidaujami sveikatos priežiūros rezultatai, patikimumas yra esminės aukštos kokybės sveikatos priežiūros rodikliai (Gopal, 2019).

Mokslinės literatūros analizė atskleidė, kad parengta nemažai tyrimų, kuriuose akcentuojama asmens sveikatos priežiūros paslaugų kokybės svarba, tačiau tuo pačiu labai mažai tyrimų, kuriuose būtų analizuojamas pacientų požiūris į atskirus, asmens sveikatos priežiūros paslaugų kokybę veikiančius, elementus. Atsižvelgiant į tai, suformuluotas tyrimo tikslas bei metodika, o *tyrimo problema* formuluojama klausimu – koks yra pacientų požiūris į nuomonę apie sveikatos priežiūros paslaugų kokybę formuojančius elementus?

TYRIMO METODOLOGIJA

Atsižvelgiant į tyrimo problemą ir siekiant įgyvendinti iškeltą tikslą buvo nuspręsta pasirinkti *kiekybinio tyrimo rūšies anketinės apklausos metodą*. Kaip nurodo Almeida su bendraautoriais (2017), kiekybinis tyrimas yra tinkamas tokiems tyrimams, kurių imtis didelė, nereikalinga atlikti kokybinių duomenų interpretacijos, o duomenys gaunami analizuojant skaitines išraiškas.

Šiam tyrimui atlikti sudaryta Pacientų pasitenkinimo gautomis asmens sveikatos priežiūros anketa, kurioje kiekvienam tyrimo dalyviui pateikta atsakyti į sociomedografinius klausimus, taip pat klausimus, kuriais analizuojamas požiūris į patirtį asmens sveikatos priežiūros įstaigose bei veiksnius, lemiančius asmens sveikatos priežiūros įstaigos pasirinkimą. Į sociodemografinius klausimus tyrimo dalyviai turėjo atsakyti pasirinkdami vieną jiems tinkamą atsakymo variantą, į klausimus apie požiūrį į patirtį asmens sveikatos priežiūros įstaigose bei veiksnius, lemiančius asmens sveikatos priežiūros įstaigos pasirinkimą tyrimo dalyviai turėjo atsakyti 5 balų *Likert'o* skalėje, kur vienetas reiškė visišką nepritarimą, o penketas – visišką pritarimą. *Tyrimo instrumento* klausimai suformuoti vadovaujantis Dahiyat ir kt. (2023), Angerer ir kt. (2021), Aloh ir kt. (2020), Trihastuti ir kt. (2020), Doran ir kt. (2017), Kitapci ir kt. (2014), Kazemi ir kt. (2013), Hennig-Schmidt ir kt. (2011) bei Buranapanitkit ir kt. (2005) atliktų tyrimo rezultatus.

Tyrimas atliktas asmens sveikatos priežiūros įstaigose, kuriose teikiamos pirminio ir antrinio lygio asmens sveikatos priežiūros paslaugas. Siekiant išlaikyti *tyrimo etikos* reikalavimus (konfidencialumas, anonimiškumas, nepakenkimas, pagarba, savanoriškumas) raštu buvo kreiptasi į asmens sveikatos priežiūros įstaigų vadovus. Atlikti tyrimą jų vadovaujamose įstaigose sutiko 34 įstaigų vadovai. Atliekant tyrimą kiekvienam pacientui arba jo atstovui buvo įteikta anketa ir paprašyta ją užpildytą į tam skirtą urną. 2023.09.02-2023.11.30 anketas užpildė ir į urną įmetė *768 anketos iš kurių 718* pripažintos tinkamomis tolimesnei analizei (likusios buvo arba neužpildytos arba užpildytos mažiau kaip 50 proc.).

Siekiant įvertinti *tyrimo instrumento klausimų nuoseklumą ir vidinį suderinamumą* SPSS statistinės analizės programa buvo apskaičiuota *Cronach'o alfa* reikšmė, kuri, atlikus skaičiavimus, buvo 0,939. Anot Taber'io (2018), šiai reikšmei esant daugiau kaip 0,9 tyrimo instrumentas yra tinkamas tolimesniems statistinės analizės veiksmams. Statistinės analizės metu buvo skaičiuoti tokie rodikliai kaip procentinis skirstinys, *Pearson'o* koreliacijos koeficientas, vidurkis, standartinis nuokrypis. Gauti duomenys aprašyti ir pateikti dažnių duomenų lentelėse.

TYRIMO REZULTATAI IR DUOMENŲ ANALIZĖ

Tyrime dalyvavo 718 tyrimo dalyvių, kurie pasiskirstė į 9,2 proc. vyrų ir 90,8 proc. moterų. Pagal gyvenamą vietą tyrimo dalyviai pasiskirstė į 67,4 proc. gyvenančius mieste, 15,3 gyvenančius miestelyje ir 17,3 gyvenančius kaime. Didžioji dalis tyrimo dalyvių, t. y. 46,5 proc. turėjo įgiję aukštąjį išsilavinimą, 33,4 proc. aukštesnįjį ir 8,6 proc. pradinį išsilavinimą.

90,3 proc. tyrimo dalyvių nurodė, kad per pastaruosius 6 mėnesius jiems teko naudotis asmens sveikatos priežiūros paslaugomis. Iš tyrimo dalyvių, kurie per pastaruosius 6 mėnesius naudojosi asmens sveikatos priežiūros paslaugomis, 63,2 proc. nurodė, kad savarankiškai teko mokėti už kai kurias asmens sveikatos priežiūros paslaugas.

Tyrimo metu buvo vertinamas respondentų požiūris į veiksnius, kurie formuoja tyrimo dalyvių nuomonę apie asmens sveikatos priežiūros įstaigos pasirinkimą. Kaip matyti iš gautų duomenų, daugiau nei puse tyrimo dalyvių asmens sveikatos priežiūros įstaigą renkasi atsižvelgdami į įstaigos lokalizaciją (arčiau gyvenamosios vietos), atsiliepimus apie gydymo įstaigą, atsiliepimus apie asmens sveikatos priežiūros specialistą kurio paslaugą pageidauja gauti, paslaugų pasirinkimą ir ankstesnes patirtis toje pačioje gydymo įstaigoje. Tuo tarpu tik vienas iš dešimties tyrimo dalyvių nurodė, kad jiems yra svarbus asmens sveikatos priežiūros įstaigos dydis bei reklama viešojoje erdvėje.

Tyrimo duomenų analizės metu nenustatyta statistiškai reikšmingų skirtumų priklausomai nuo tyrimo dalyvio lyties ir veiksnių, lemiančių asmens sveikatos priežiūros įstaigos pasirinkimą. Renkantis asmens sveikatos priežiūros įstaigą statistiškai reikšmingi skirtumai nustatyti tarp tyrimo dalyvių gyvenamosios vietovės ir ankstesnės patirties toje pačioje gydymo įstaigoje, t. y. mieste gyvenantys tyrimo dalyviai statistiškai reikšmingai dažniau įvertina ankstesnę patirtį, lyginant su tais, kurie gyvena miestelyje ar kaime (p=0,004). Miestelyje ir kaime gyvenantys tyrimo dalyviai rečiau linkę vertinti atsiliepimą internete apie gydytoją nei tie tyrimo dalyviai, kurie gyvena mieste (p<0,001), tačiau dažniau linkę rinktis gydymo įstaigą atsižvelgdami į aplinkinių rekomendacijas (p<0,001).

Tyrimo metu surinkti duomenys atskleidė, kad tyrimo dalyviai, kurie gyvena mieste, per pastaruosius šešis mėnesius statistiškai reikšmingai dažniau naudojosi sveikatos priežiūros paslaugomis (p=0,014), dažniau mokėjo už pasirinktas asmens sveikatos priežiūros paslaugas (p=0,015), labiau linkę domėti atsiliepimais apie paslaugas teiksiantį asmens sveikatos priežiūros specialistą (p<0,001) bei domisi reklama viešoje erdvėje apie asmens sveikatos priežiūros įstaigą (p=0,021) lyginant su tais, kurie gyvena miestelyje arba kaime.

Tyrimo dalyviai, kuriems per pastaruosius šešis mėnesius teko mokėti už savarankiškai už pasirinktas asmens sveikatos priežiūros paslaugas, rinkdamiesi asmens sveikatos priežiūros įstaigą statistiškai reikšmingai dažniau atsižvelgia į įstaigos dydį (p=0,008), įstaigos buvimą arčiau gyvenamosios vietos (p<0,001), atsiliepimus apie įstaigą viešojoje erdvėje (p<0,001), atsiliepimus apie asmens sveikatos priežiūros specialistą (p<0,001), paslaugų spektrą įstaigoje (p=0,008) bei kitų žmonių rekomendacijas (p<0,001).

1 lentelėje pateikiami koreliacijos duomenys tarp tyrimo dalyvio požymių ir jų nuomonės apie tai, kokiomis savybėmis turi pasižymėti jiems paslaugas teikiantis asmens sveikatos priežiūros specialistas. Kaip matyti iš gautų duomenų, tarpusavio koreliacija yra nustatyta tarp tyrimo dalyvio lyties ir specialisto siūlomų problemų sprendimo įvairovės, tarp gyvenamosios vietovės ir paslaugas teikiančio specialisto lyties, amžiaus, rodomo dėmesio problemai, įtraukimo į problemos sprendimą ir siūlomų problemų sprendimo įvairovės (1 lent.).

1 lentelė. Tyrimo dalyvių požymių ir nuomonės apie tai, kokiomis savybėmis turi pasižymėti jiems paslaugas teikiantis asmens sveikatos priežiūros specialistas, koreliacijos

Tyrimo dalyvio požymis	**Statistinis rodiklis**	**Svarbi asmens sveikatos priežiūros specialisto lytis**	**Svarbus asmens sveikatos priežiūros specialisto amžius**	**Asmens sveikatos priežiūros specialistas rodo dėmesį mano problemai**	**Asmens sveikatos priežiūros specialistas įsiklauso mano nuomone**	**Asmens sveikatos priežiūros specialistas įtraukia mane i paslaugų teikimo planą**	**Asmens sveikatos priežiūros specialistas nurodo įvairius galimus problemų sprendimo budus**
Lytis	r	-0,031	0,048	-0,014	-0,073	-0,028	**-0,090***
	p	0,408	0,199	0,710	0,052	0,450	0,016
Gyvenamoji vietovė	r	**-0,123****	**-0,077***	**0,150****	**0,074***	0,047	**0,086***
	p	<0,001	0,040	<0,001	0,048	0,211	0,021
Per pastaruosius 6 mėn. naudojosi asmens sveikatos priežiūros paslaugomis	r	-0,064	-0,040	**0,147****	**0,123****	0,051	**0,174****
	p	0,087	0,288	<0,001	<0,001	0,170	<0,001
Per pastaruosius	r	**-0,158****	**-0,115****	**0,192****	**0,096****	**0,135****	**0,173****

6 mėn. savarankiškai mokėjo už asmens sveikatos priežiūros paslaugas	p	<0,001	0,002	<0,001	0,010	<0,001	<0,001

Šaltinis: sudaryta autoriaus pagal tyrimo duomenis (2023)

Tyrimo duomenų analizės metu taip pat nustatytos statistiškai reikšmingos sąsajos tarp tyrimo dalyvių lyties ir jaukumo įstaigoje, rankų švaros ir skelbimų monitoriuose pastebėjimo, tarp tyrimo dalyvių gyvenamosios vietovės ir įstaigoje esančio inventoriaus pastebėjimą (2 lentelė).

2 lentelė. Koreliacija tarp tyrimo dalyvių lyties ir nuomonės apie kokybę formuojančių elementų

Tyrimo dalyvio požymis	**Statistinis rodiklis**	**Jaukumą įstaigoje**	**Darbo aprangos švarą**	**Rankų švarą**	**Žvilgsnį bendraujant**	**Kvapus**	**Inventorių**	**Skelbimus monitoriuose**
Lytis	r	**0,079***	-0,026	**-0,102****	-0,035	0,026	0,023	**0,093***
	p	0,033	0,490	0,006	0,347	0,490	0,541	0,013
Gyvenamoji vietovė	r	0,011	-0,022	0,014	0,031	0,013	**0,083***	0,065
	p	0,767	0,556	0,715	0,400	0,736	0,025	0,083
Per pastaruosius 6 mėn. naudojosi asmens sveikatos priežiūros paslaugomis	r	0,059	0,073	**0,103****	-0,012	-0,013	0,031	-0,018
	p	0,116	0,052	0,006	0,748	0,733	0,408	0,632
Per pastaruosius 6 mėn. savarankiškai mokėjo už asmens sveikatos priežiūros paslaugas	r	0,047	**0,099****	**0,134****	**0,084***	**0,097****	**0,089***	**-0,084***
	p	0,210	0,008	<0,001	0,024	0,009	0,017	0,024

Šaltinis: sudaryta autoriaus pagal tyrimo duomenis (2023)

Įvertinus tyrimo dalyvių nuomonę apie kokybės vadybos sistemos svarbą įstaigoje, kurioje jie renkasi gauti asmens sveikatos priežiūros paslaugas, nustatyta, kad 60,4 proc. tyrimo dalyvių yra svarbu, kad įstaigoje būtų įdiegta kokybės vadybos sistema, 10,6 proc. nurodė tai jiems esant nesvarbu, o likę 29,0 proc. nurodė nežinantys kas yra kokybės vadybos sistema. Įvertinus tyrimo rezultatus nustatyta, kad kokybės vadybos poreikį įstaigoje mato 48,5 proc. vyrų ir 61,7 proc. moterų ($p<0,001$), o mažuose miesteliuose gyvenantys tyrimo dalyviai beveik du kartus dažniau nurodė nesant poreikio įstaigoje, kurioje renkasi gauti asmens sveikatos priežiūros paslaugas, būti įdiegtai kokybės vadybos sistemai ($p=0,032$).

Tyrimo dalyvių buvo paprašyta įvertinti savo paskutinio apsilankymo gydymo įstaigoje patirtį įvairiais aspektais. Tyrimo rezultatų analizė atskleidė, kad geriausiai tyrimo dalyviai įvertino įstaigoje esančią švarą ir jaukumą, slaugytojo ir gydytojo bendravimą, tuo tarpu blogiausiai įvertinta buvo suteiktos mokamos paslaugos kaina (žr. 3 lent.).

3 lentelė. Tyrimo dalyvių požiūris į jų nuomonę apie kokybę formuojančius elementus

Teiginys	**Vidurkis**	**Standartinis nuokrypis**
Švara ir jaukumas	85,22	17,11
Slaugytojo bendravimas	83,48	20,61

Gydytojo bendravimas	78,92	24,59
Registratūros darbuotojo bendravimas	77,48	26,08
Gydymo ir/ar slaugos paslaugų tikslumas	76,19	26,42
Paslaugų pasirinkimas	75,22	26,74
Eiles prie specialistų kabinetų	67,90	32,06
Eiles registratūroje	62,75	34,70
Laukimo laikas	61,38	34,80
Paslaugos kaina	59,56	31,95

Šaltinis: sudaryta autoriaus pagal tyrimo duomenis (2023)

Įvertinus tyrimo dalyvių pasitenkinimą gautų asmens sveikatos priežiūros paslaugų kokybe nustatyta, kad didžioji dalis, t. y. 54,9 proc. tyrimo dalyvių buvo patenkinti gautomis asmens sveikatos priežiūros paslaugomis, 33,1 proc. buvo patenkinti iš dalies, o 12,0 proc. nurodė esantys nepatenkinti gautų asmens sveikatos priežiūros paslaugų kokybe. Pasitenkinimas gautomis paslaugomis priklausomai nuo tyrimo dalyvių lyties buvo panašus ir statistiškai reikšmingų skirtumų nenustatyta, tuo tarpu pasitenkinimo priklausomai nuo gyvenamosios vietovės analizė atskleidė, kad dvigubai mažai tyrimo dalyvių, gyvenančių mieste, lyginant su gyvenančiais miesteliuose ir kaimuose, buvo nepatenkinti gautų paslaugų kokybe ($p<0,001$).

IŠVADOS

1. Asmens sveikatos priežiūros paslaugų kokybę yra aktuali tematika tiek tarp šią sveikatos politikos formuotojų, tiek tarp asmens sveikatos priežiūros paslaugų gavėjų. Šios temos aktualumą pagrindžia konkurencinio pranašumo siekimas tarp paslaugos tiekėjų, siekis subalansuoti sąnaudas ir pajamas, siekis būti lyderiu rinkoje ir būtinybė dalyvauti nuolatiniame technologiniame tobulėjime.
2. Nuomonę tarp asmens sveikatos priežiūros paslaugų gavėjų formuoja ne įdiegta kokybės vadybos sistema ar pasirinktas vadovavimo stilius, tačiau kokybę formuojantys veiksniai, t. y. tai, kas paslaugos gavėjui leidžia susidaryti subjektyvią nuomonę apie būsimą paslaugą ir jausmus ją gavus.
3. Tyrimo rezultatai atskleidė, kad paslaugų gavėjams yra labai svarbu paslaugas gauti arčiau savo gyvenamosios vietos ir tik kas dešimtam paslaugų gavėjui yra svarbūs tokie veiksniai kaip įstaigos dydis ar reklama apie įstaigą viešojoje erdvėje. Mažesniuose miesteliuose ar kaimuose gyvenantys paslaugų gavėjai nesureikšmina kokybės vadybos sistemos, tačiau akcentuoja atsiliepimus apie asmens sveikatos priežiūros įstaigą. Rinkdamiesi sveikatos priežiūros įstaigą paslaugų gavėjai linkę vadovautis ankstesnėmis patirtimis.

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GEOPOLITINĖS SITUACIJOS POVEIKIS LIETUVOS EKONOMIKAI IR VERSLUI: 2019-2022M. EKONOMINIŲ RODIKLIŲ ANALIZĖ

IMPACT OF GEOPOLITICAL SITUATION ON LITHUANIAN ECONOMY AND BUSINESS: 2019-2022 ANALYSIS OF ECONOMIC INDICATORS

INDRĖ ŠMITIENĖ, MARTYNAS ČIUPLYS
SMK University of Applied Sciences, Lithuania

Annotation

In the modern global context, prominent geopolitical changes, such as the Covid-19 pandemic and the Russian intervention in Ukraine, have notably altered the global trends of economy. This has caused the significant economic challenges for many countries. The analysis carried out in the research is concentrated on Lithuania and based on the secondary data sources. It emphasizes the impact of these geopolitical events on the country's economy and business environment. The findings of the research are decisive for entities that operate in Lithuania. This article analyzes the following economic indicators: annual change in gross domestic product (GDP), annual change in inflation, import and export, annual change in fuel prices, average annual price of electricity, annual change in oil prices, average annual price of electricity. The article presents the impact of these economic indicators on the Lithuanian economy and business. The research used the following methods: analysis of scientific literature and analysis of statistical data. The results are processed by MS Excel and Python programs. It was determined that the changes in the geopolitical situation led to the growth of inflation, the slowdown of the annual growth rate of the gross domestic product and increase in the annual indicators of import and export. Due to these factors, a surge in electricity, fuel, oil prices have been observed, which has had a negative impact on economic stability and business sectors.

Keywords: geopolitical situation, business, economy.

Anotacija

Šiuolaikiniame globaliame kontekste, ryškūs geopolitiniai pokyčiai, tokie kaip Covid-19 pandemija ir Rusijos intervencija į Ukrainą, akivaizdžiai pakeitė pasaulines ekonomikos kryptis. Tai sukėlė esminius ekonominius iššūkius daugeliui šalių. Šiame tyrime atlikta analizė, sutelkta į Lietuvą ir pagrįsta antriniais duomenų šaltiniais, pabrėžia šių geopolitinių įvykių įtaką šalies ekonomikai ir verslo aplinkai. Šio tyrimo išvados yra lemiamos subjektams, veikiantiems Lietuvoje. Šiame straipsnyje analizuojami tokie ekonominiai rodikliai kaip: bendrojo vidaus produkto (BVP) metinis pokytis, infliacijos metinis pokytis, importas ir eksportas, degalų kainų metinis pokytis, elektros vidutinė metinė kaina, naftos kainos metinis pokytis, elektros vidutinė metinė kaina. Straipsnyje pateikiami šių ekonominių rodiklių poveikis Lietuvos ekonomikai ir verslui. Tyrimo metu naudoti tokie metodai kaip: mokslinės literatūros analizė ir statistinių duomenų analizė. Rezultatai apdorojami MS Excel ir Python programa. Nustatyta, kad geopolitinės situacijos pokyčiai sąlygojo infliacijos augimą, bendrojo vidaus produkto metinio augimo tempų sulėtėjimą, bei padidėjusius importo ir eksporto metinius rodiklius. Dėl šių veiksnių stebėtas reikšmingas degalų, naftos ir elektros kainų šuolis, kuris turėjo negatyvų poveikį ekonominiam stabilumui ir verslo sektoriams.

Raktiniai žodžiai: geopolitinė situacija, verslas, ekonomika.

ĮVADAS

Tyrimo aktualumas ir problema. Geopolitiniai įvykiai ir tendencijos nuolat keičiasi, kurdami naujus iššūkius ir galimybes pasaulinei ekonomikai bei verslui. Šiuolaikinėje globalizuotoje visuomenėje geopolitika turi tiesioginę įtaką ekonomikai. Valstybių ekonominiai interesai, tiekimo grandinės ir rinkos priklauso nuo stabilios geopolitinės aplinkos (Chang ir Grabel, 2020; Fusacchia, 2020). Tačiau, kai šis stabilumas sutrinka – dėl karų, sankcijų ar diplomatinių konfliktų, tai gali sukelti didelių ekonominių svyravimų (Caldara ir Iacoviello, 2022). JAV ir Kinijos prekybos konfliktas, Covid-19 pandemija ir konfliktas tarp Rusijos ir Ukrainos – tai tik keletas pavyzdžių, kurie išryškina geopolitinio nestabilumo reikšmingumą pasaulinei ekonomikai.

Nors naujos rinkos, technologijų plėtra ir globalizacija leidžia verslams plėtoti veiklą už nacionalinių sienų, tačiau tai žymi ir didesnį pažeidžiamumą geopolitiniu aspektu (Taghizadeh-Hesary, Rasoulinezhad, Yoshino, 2021, p. 799). Įmonėms veikiant globalioje aplinkoje svarbu ne tik numatyti rizikas, bet ir gebėti prisitaikyti prie jų. Tai gali reikšti diversifikavimą, strategijos keitimą ar net naujų rinkų atvėrimą.

Atsižvelgiant į geopolitinės situacijos poveikio ištirtumo būtinumą, mokslininkai vis intensyviau nagrinėja geopolitinės situacijos poveikį pasaulio ekonomikai. Viena iš plačiausiai analizuotų temų yra geopolitinių rizikų poveikis tarptautinėms finansų rinkoms (Fusacchia, 2022; Rezaei, Fallah, 2019; Gholizadeh, Madani, Saneinia, 2020; Caldara ir Iacovielo, 2022). Mokslininkai tyrė, kaip geopolitinės įtampos veikia valiutų kursus ir kapitalo srautus. Dalis mokslininkų taip pat atkreipė dėmesį į geopolitikos poveikį ekonomikai, nagrinėjant valstybių gebėjimą prisitaikyti prie karinio konflikto indikuotų įtampų (Pilpauskaitės, 2022). Šiuose tyrimuose nagrinėjama kaip kariniai konfliktai gali lemti pasaulinės prekybos modelių pasikeitimus, išskiriant Baltijos šalių pažeidžiamumą bei didelį poveikio spektrą.

Nors dalis mokslininkų analizavo geopolitinės situacijos poveikį ekonomikai ir verslui, svarbu didinti žinių bazę dėl dinamiškos rinkos, mažo atsikartojamumo, tiesioginio poveikio intensyvumo bei analizuojamos temos aktualumo. Todėl apibrėžiama mokslinė problema iškeliant probleminį klausimą: kaip geopolitinės situacijos pokyčiai, išryškėję 2019-2022m. paveikė Lietuvos ekonomiką ir verslą?

Tyrimo tikslas. Išanalizuoti geopolitinės situacijos poveikį ekonomikai ir verslui, Lietuvoje.

Tyrimo metodologija. Mokslinės literatūros ir antrinių duomenų analizė taikant lyginamosios analizės ir koreliacijos metodus.

Tyrimo rezultatai. Analizuojant mokslinę literatūrą ir atlikus statistinių duomenų analizę nustatyta, kad geopolitinės situacijos pokyčiai sąlygojo infliacijos augimą, bendrojo vidaus produkto metinio augimo tempų sulėtėjimą bei padidėjusius importo ir eksporto metinius rodiklius. Dėl šių veiksnių stebėtas reikšmingas degalų, naftos ir elektros kainų šuolis, kuris turėjo negatyvų poveikį ekonominiam stabilumui ir verslo sektoriams.

Tyrimo originalumas/vertė. Daugelis ankstesnių tyrimų pasižymi koncentracija į didžiųjų šalių ekonominę analizę. Pastebima, kad mažesnės rinkos dažniausiai yra pakankamai neištyrinėtos. Geopolitinės situacijos kontekste išanalizuoti 2019-2022m. rodikliai, karo metu turintys didelę įtaką ne tik tai šaliai, kurioje vyksta karas, bet ir ją remiančioms šalims. Todėl šio laikotarpio rodiklių analizė padės identifikuoti galimas rizikas, su kuriomis Lietuva gali susidurti ateityje. Panašių arba tokių pat rodiklių analizė gali būti atliekama ir kitose šalyje.

TYRIMO METODOLOGIJA

Siekiant išanalizuoti ekonomikos ir verslo pokyčius pasikeitus geopolitinei situacijai Lietuvoje, atlikta antrinių duomenų analizė. Tyrimo metu remtasi tokiais rodikliais kaip: bendrojo vidaus produkto (BVP) metinis pokytis, infliacijos metinis pokytis, importas ir eksportas, degalų kainų metinis pokytis, elektros vidutinė metinė kaina, naftos kainos metinis pokytis, elektros vidutinė metinė kaina. Šie rodikliai yra labai svarbūs ir rodo Lietuvos ekonomikos gebėjimą prisitaikyti prie reikšmingų geopolitinių permainų. Infliacijos, BVP, importo ir eksporto rodiklius svarbius ekonomikai ir verslui išskiria šie autoriai: Ahmed ir kt. (2022); Caldara ir Iacoviello, (2022); Clansey-Shang ir Fu (2023); Felix ir kt. (2020); Ghaffar, ir kt. (2023); Harrison ir kt. (2018); Istiak ir Alam (2019). Naftos kainų, degalų pokytį ir elektros vidutinės metinės kainos pokyčio svarbą šalies ekonomikai įvardina šie autoriai: Koppenberg ir kt. (2021); Marzban ir kt. (2022); Milojevic, ir Mihajlovic (2019); Mitsas ir kt. (2022); Murray (2014); Nagyova ir kt. (2018); Nosi ir kt. (2023); Poskitt, ir Yao (2017); Prisecaru (2021); Sohag ir kt. (2022); Wood ir kt. (2020).

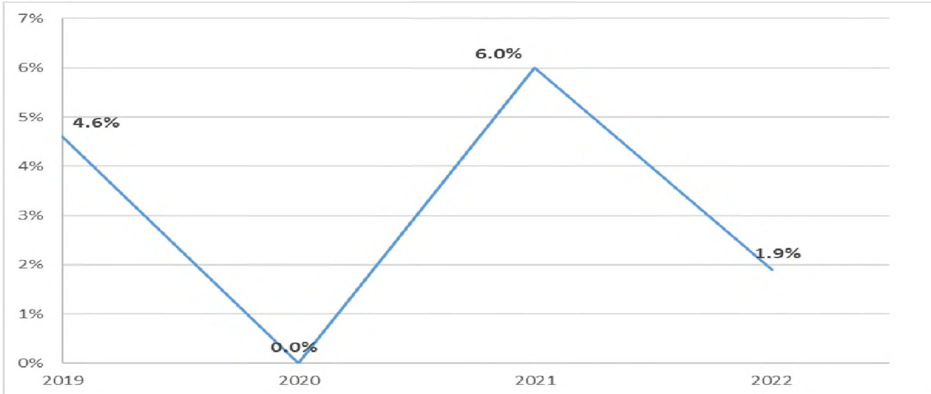
Analizei atrinkti septyni ekonomikos pokyčių rodikliai. Duomenų atrankos kriterijai pasižymi sąsaja su analizuojamos temos tikslu, siekiant išskirti svarbiausią, specifinį geopolitinės situacijos poveikį ekonomikai ir verslui. Tyrimo metu atlikta statistikos rodiklių aprašomosios statistikos duomenų analizė. Gauti statistiniai duomenys ir indikatoriai yra pateikiami paveiksluose ir lentelėse. Atlikus duomenų lyginamąją analizę, identifikuoti analizuojamų rodiklių tarpusavio koreliacijos koeficientai. Kuo artimesnis koreliacijos koeficientas 1-tui arba -1-tui, tuo stipresnis yra ryšys tarp dviejų kintamųjų. Teigiama koeficiento reikšmė rodo, kad kai vienas kintamasis didėja, kitas taip pat didėja, o neigiama - kad kai vienas didėja, kitas mažėja. Toliau pateikiamos esminės tendencijos, kurios yra akcentuojamos, o remiantis gautais rezultatais, pateikiamos išvados.

Tyrimo eiga sudaryta iš kelių etapų. Pirmajame etape atskleidžiami pagrindiniai ekonomikos pokyčių rodikliai. Atliekant mokslinių šaltinių analizė išgryninti 7 pagrindiniai ekonominiai rodikliai: bendrojo vidaus produkto (BVP) metinis pokytis, infliacijos metinis pokytis, importas ir eksportas, degalų kainų metinis pokytis, elektros vidutinė metinė kaina, naftos kainos metinis pokytis, elektros vidutinė metinė kaina. Analizuojami pokyčiai nuo 2019m. iki 2022m. imtinai. Antrajame etape apskaičiuojami analizuojamų rodiklių tarpusavio koreliacijos ryšiai. Rezultatai apdorojami ir susisteminami MS Excel ir Python programa.

TYRIMO REZULTATAI IR DUOMENŲ ANALIZĖ

Lietuva, kaip maža, atvira ekonomika ir NATO bei ES narė, 2019-2022 metais susidūrė su didžiuliais iššūkiais, atsižvelgiant į pasaulio geopolitines krizes bei COVID-19 pandemijos poveikį, kuris tiesiogiai paveikė šalies ekonomiką. Šis laikotarpis pasižymėjo geopolitinių įvykių intensyvumu, pandemijos sukeltais ekonominiais pokyčiais ir jų įtaka nacionaliniam ekonomikos augimui, kuri vis dar yra ekonominio diskurso centre. Kiekybiniam tyrimui atlikti analizuojami Lietuvos statistiniai 2019-2022 metų rodikliai. Siekiant įvertinti Lietuvos ekonomikos pokyčius išskiriami tokie rodikliai kaip: bendrojo vidaus produkto (BVP) metinis pokytis, infliacijos metinis pokytis, eksporto metinis dydis, importo metinis dydis (Pilipauskaitė, 2022). Pažymima, kad BVP metinis pokytis yra vienas iš pagrindinių rodiklių, kuris atspindi šalies ekonominį našumą, o pandemijos kontekste jis parodo ekonominį nuosmukį ar atsigavimą (Baldwin, di Mauro, 2020). Kitas atrinktas rodiklis yra infliacijos metinis pokytis, atspindintis vartotojų perkamąją galią, kainas ir investicijas. Atsižvelgiant į geopolitinius pokyčius tarptautinės prekybos srityje, taip pat analizuojami eksporto ir importo metiniai dydžiai, siekiant įvertinti Lietuvos ekonomikos gebėjimą prisitaikyti prie reikšmingų geopolitinių permainų. Remiantis Pilipauskaite (2022), galima teikti, kad svarbiausi ekonomikos rodikliai rodo, kad geopolitinė situacija daro didelę įtaką kitoms šalims, kurios tiesiogiai nedalyvauja kariniame konflikte. Vakarams pritaikius sankcijas Rusijai, ekonominių rodiklių pokytis yra reikšmingas Lietuvos ekonomikai ir verslui. Tokios pasekmės bus juntamos ir kitose pasaulio šalyse.

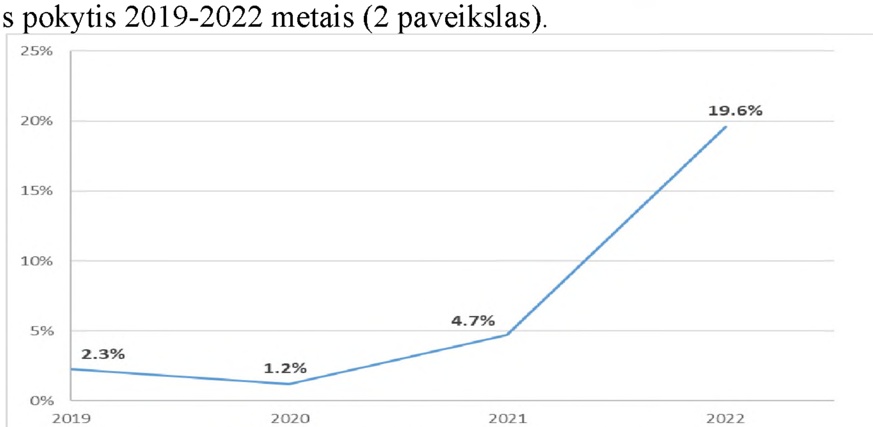
Bendrojo vidaus produkto (BVP) metinis pokytis. Lietuvos ekonomikai bendrasis vidaus produktas (BVP) yra vienas iš svarbiausių ekonominių rodiklių. Bendrasis vidaus produktas (BVP) rodo šalies ekonomikos išsivystymo lygį (Poskitt ir Yao, 2017). Kuo didesnis bendrojo vidaus produkto (BVP) metinis pokytis, tuo sparčiau vystosi šalies ekonomika (žr. 1 pav.).



1 pav. Bendrojo vidaus produkto (BVP) metinis pokytis 2019-2022 metais
Šaltinis: Lietuvos statistikos departamentas (2023)

Lietuvos 2019-2022 metais bendrojo vidaus produkto (BVP) metiniai tempai nestabilūs (1 pav.). 2019 metais bendrojo vidaus produkto (BVP) metinis pokytis siekė 4.6%, o 2020 metais – 0%. Pastebima, kad 2019 m. BVP metinis pokytis yra 4.6% didesnis nei 2020 metais. Dar daugiau, 2021 metais BVP metinis pokytis siekė 6 procentus (t. y. net 6 procentais didesnis nei 2020 metais). Tai žymi Lietuvos ekonomikos atsigavimą po Covid-19 pandemijos, siejamą su atviresniais prekybos kanalais, stabiliu gyventojų finansiniu pajėgumu dėl nacionaliniu mastu vykdomo ekonomikos gaivinimo plano, subsidijų bei lengvatų tiek verslo subjektams, tiek gyventojams. Vis dėlto, 2022 metais BVP metinis pokytis siekė tik 1.9%, (t. y. tai 4.1 procentais mažiau nei 2021 metais). Galima teigti, kad sumažėjęs BVP metinis pokytis yra susijęs su prasidėjusia pasaulinės energetikos kainų krize.

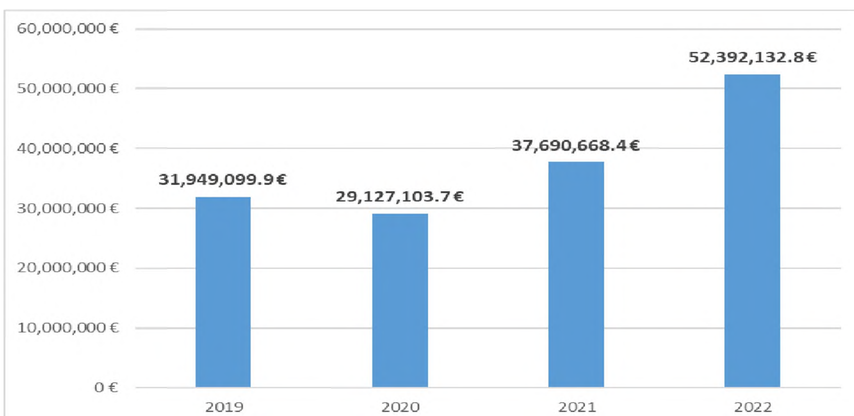
Infliacijos metinis pokytis. Analizuojant Lietuvos ekonomikos tendencijas, infliacijos dydis yra vienas pagrindinių rodiklių, turinčių reikšmingą įtaką šalies ekonomikai. Europos Centrinio Banko nustatytas 2 proc. tikslinis metinis infliacijos pokytis yra strateginis siekis, skirtas užtikrinti makroekonominę stabilumą ir veiksmingai apsisaugoti nuo defliacinio spaudimo rizikos. Ši politika atspindi glaudžius ryšius tarp infliacijos lygio, ekonomikos augimo ir užimtumo ir yra lemiamas veiksnys formuojant ekonominę politiką ne tik Lietuvoje, bet ir visoje euro zonoje. Stabiliose ekonomikose siektini infliacijos rodikliai yra tarp 1 ir 3 procentų. Kitose, ekonomiškai mažiau stabiliose šalyse, dažnai priskiriamose prie besivystančių, metinė infliacija dažniausiai svyruoja tarp 2 ir 8 procentų (Milojevic ir Mihajlovic, 2019). Žemiau pateikiamas Lietuvos infliacijos metinis pokytis 2019-2022 metais (2 paveikslas).



2 pav. Infliacijos metinis pokytis 2019-2022 metais
Šaltinis: Lietuvos statistikos departamentas (2023)

Remiantis 2 paveikslo duomenimis, akivaizdu, kad Lietuvos 2019-2022 metais infliacijos metiniai pokyčiai yra nuolat kintantys. 2019 metais infliacijos metinis pokytis pasižymi stabilumu – 2.3 procento, indikuodamas Lietuvos ekonomikos normalų funkcionavimą. Vis dėlto, analizuojant 2020 metų duomenis pastebime, kad infliacijos metinis pokytis sumažėjo iki 1.2 procento. Nustatytas šio infliacijos metinio pokyčio nuosmukis siejamas su Covid-19 pandemijos lemiamais pokyčiais. Remiantis infliacijos metinių pokyčių duomenimis taip pat matome, kad 2021 metais infliacijos metinis pokytis siekė 4.7 procentų, (t. y. padidėjo 3.5 procentiniais punktais lyginant su 2020 metais). Šiuo laikotarpiu stebimas ekonomikos augimas. Svarbu pažymėti, kad 2022 metinis pokytis siekia 19.6 procentų, (t. y. net 14.9 procentiniais punktais didesnis infliacijos metinis pokytis nei 2021 metų). Pastebimas, kad padidėjęs infliacijos metinis pokytis 2022 metais susijęs su 2022 metų vasario 24 dieną Rusijos pradėta Ukrainos karine invazija, kuri neigiamai paveikė Lietuvos ekonomiką dėl apribotų įprastų energetikos sektoriaus produktų ribojimų, sukeliant būtinųjų prekių trūkumą, lemiantį kainų augimą.

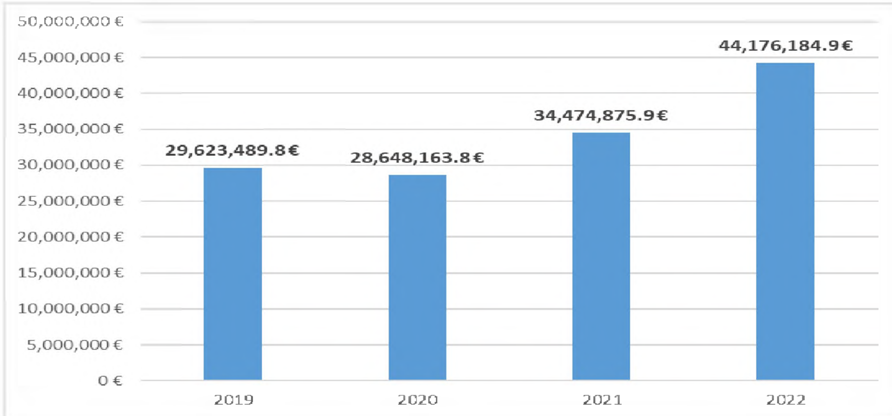
Importas ir eksportas. Importas ir eksportas yra esminiai veiksniai šalių ekonominėje plėtroje ir augime. Šalys su gausiomis tam tikrų išteklių atsargomis jas parduoda šalims, kurios patiria tokių išteklių trūkumą. Kita vertus, šalys, susiduriančios su išteklių stoka ar deficitu, juos importuoja iš šalių, kurios gali pasiūlyti didesnius kiekius (Nagyova, Horakova, Moroz, Horska ir Polakova, 2018). Analizuojami Lietuvos importo metiniai dydžiai pateikiami žemiau esančiame paveiksle (3 paveikslas).



3 pav. Importo metinis dydis 2019-2022 metais
Šaltinis: Lietuvos statistikos departamentas (2023)

Remiantis importo metinio dydžio duomenimis, galime teigti, kad Lietuvos 2019-2022 metų importo metiniai dydžiai pasižymi nepastovumu. 2019 metais importo metinis dydis Lietuvoje buvo 31 949 099,9 eurų. Pastebima, kad 2020 metų importo metinis dydis buvo 8,8 procentais mažesnis nei 2019 metais. Sumažėjęs Lietuvos importo dydis 2020 metais gali būti siejamas su Covid-19 pandemijos sąlygotais apribojimais. 2021 metais importo metinis dydis sudarė 37 690 668,4 eurų (t. y. 29,4 procentais daugiau lyginant su 2020 metais). Tai parodo, kad 2021 metais šalies ekonomika buvo auganti. 2022 metais fiksuojamas 52 392 132,8 eurų Lietuvos importo metinis dydis, kuris yra 39 procentais didesnis nei 2021 metais. Pastebima, kad padidėjęs Lietuvos 2022 metų importo dydis susijęs su pasauline energijos išteklių kainų krize.

Toliau analizuojamas Lietuvos eksporto metinis dydis 2019-2022 metais (4 paveikslas).



4 pav. Eksporto metinis dydis 2019-2022 metais
Šaltinis: Lietuvos statistikos departamentas (2023)

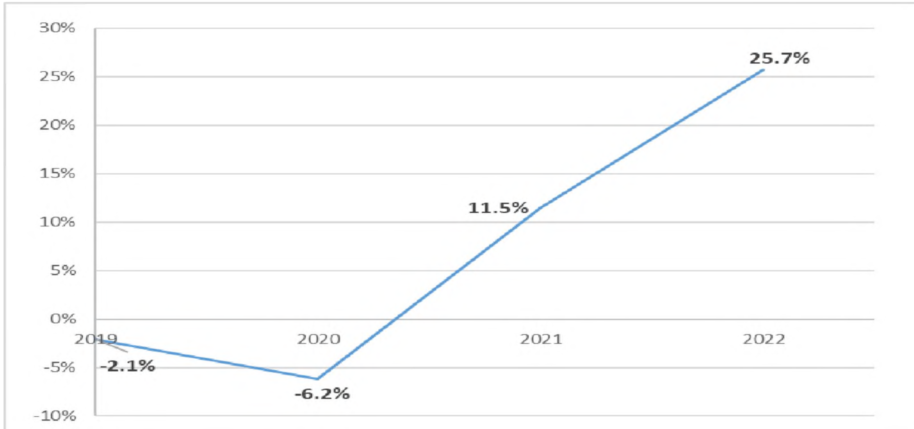
Atsižvelgiant į pateiktus duomenis (4 paveikslas), nustatyta, kad 2019-2022 metais Lietuvos eksporto metiniai dydžiai yra nepastovūs. 2019 metais eksporto metinis dydis Lietuvoje siekė 29 623 489,8 eurų. 2020 metais registruotas 28648163,8 eurų eksporto metinis dydis (t. y. 3,3 procentais mažiau nei 2019 metais). 2021 metais eksporto metinis dydis Lietuvoje padidėjo iki 34 474 875,9 eurų, (t.y. 20,3 procentais daugiau nei 2020 metais). 2022 metais Lietuvos eksporto metinis dydis išaugo 28,1 procentais iki 44 176 184,9 eurų. Pastebima, kad importo srautus formuojantys veiksniai taip pat yra lemiami ir formuojant eksporto metinius dydžius (karinė invazija, pandemija).

Apibendrinant, 2019-2022 metų laikotarpiu Lietuvos ekonomikai ir globaliam ekonominiam kontekstui įtakos turėjo kardinalūs geopolitiniai įvykiai. Vieni iš jų - Rusijos karinė intervencija Ukrainoje bei pasaulinės reikšmės Covid-19 pandemija. Šie geopolitiniai posūkiai koreliuoja su kritiniais ekonomikos rodikliais, įskaitant infliacijos metinį pokytį, bendrojo vidaus produkto metinį augimą, bei importo ir eksporto metinius dydžius. Geopolitiniai faktoriai ne tik paveikia atskirų šalių ekonomiką, bet ir turi poveikį viso pasaulio ekonominiams procesams, modifikuodami jau minėtus ekonominius rodiklius. Dėl to, supratimas apie geopolitinę situaciją ir jos kaitą yra gyvybiškai svarbus sprendžiant apie globalią ekonomiką ir jos trajektorijas.

Lietuvos verslų pokyčių analizė pasikeitus geopolitinei situacijai

Išanalizavus pagrindinius ekonominės veiklos rodiklius, tokius kaip infliacijos metinį pokytį, bendrojo vidaus produkto metinį augimą, importo ir eksporto metinius dydžius, nustatėme Lietuvos ekonomikos būklę analizuojamu laikotarpiu. Tačiau siekiant suprasti, kaip šie pokyčiai paveikė Lietuvos verslus, toliau analizuojami tokie rodikliai – degalų kainų metinis pokytis, elektros vidutinė metinė kaina už 1 MWh ir naftos kainų metinis pokytis. Šių rodiklių analizė yra svarbi, nes ji suteikia aiškesnį vaizdą apie tai, kaip geopolitinės situacijos kaita, gali turėti tiesioginį poveikį verslų veiklai ir pelningumui.

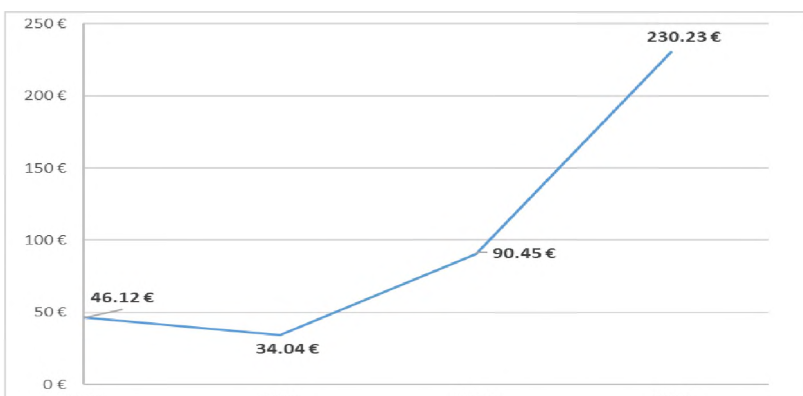
Degalų kainų metinis pokytis. Degalų kainos yra vienas iš pagrindinių veiksnių, darančių įtaką tiek privačioms asmenims, tiek įmonėms. Kintančios degalų kainos gali turėti didelę įtaką transporto, logistikos ir gamybos sektorių veiklai (5 paveikslas). Pastebima, kad degalų kainos formavimasis yra sudėtingas procesas, kurį veikia daugelis veiksnių (Ghaffar, Zaheer Zaidi ir Islam, 2023).



5 pav. Degalų kainų metinis pokytis 2019-2022 metais
Šaltinis: Lietuvos bankas (2023)

Analizuojant degalų metinį pokytį Lietuvoje (5 paveikslas), nustatyta, kad Lietuvoje 2019 metais degalų kainos mažėjo 2,1 procento. Nors mažėjimą lėmusių priežasčių gali būti daug, manoma, kad degalų kainų mažėjimą lėmė naftos tiekimo perteklius. Pastebima, kad 2020 metais fiksuojamas dar didesnis degalų kainos mažėjimas (t. y. 6,2 procento). Galime teigti, kad geopolitinės situacijos kaita, lemiama Covid-19 pandemijos turėjo įtakos degalų kainų metiniams pokyčiams. Nustatyta, kad 2021 metais degalų kainos padidėjo 11,5 procento (t. y. 17,7 procento daugiau nei 2020 metais). Galima teigti, kad ženklus kainų augimas 2021 metais siejamas su gamybos, prekybos ir vartojimo didėjimu. 2022 metais degalų kainų metinis pokytis siekė 25,7 procento (t. y. 14,2 procento daugiau nei 2021 metais). Reikšmingas degalų kainų metinis pokytis 2022 metais yra susijęs su taikomomis ekonominėmis ir finansinėmis sankcijomis Rusijos valstybei.

Elektros vidutinė metinė kaina. Elektra yra esminis energijos šaltinis įvairiose pramonės šakose. Jos kaina gali turėti tiesioginę įtaką gamybos sąnaudoms, pelningumui ir konkurencingumui rinkoje. Be to, kintanti elektros kaina gali sukelti poreikį ieškoti alternatyvių energijos šaltinių ar investuoti į energijos taupymo technologijas (Marzban ir Firozpour, 2022).



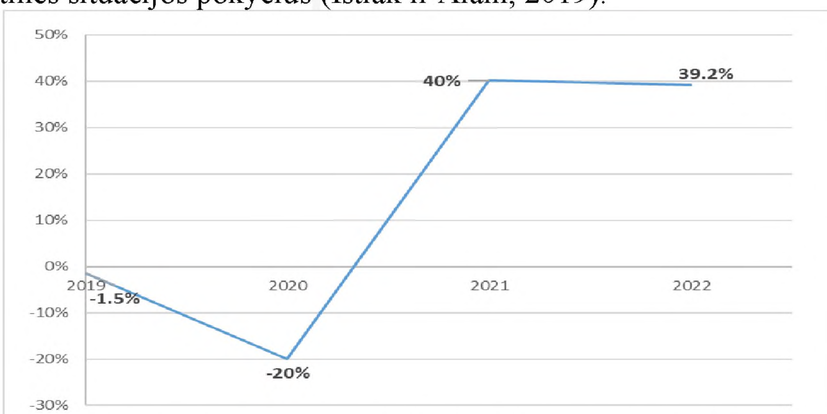
6 pav. Elektros vidutinė metinė kaina už 1 MWh 2019-2022 metais
Šaltinis: Lietuvos bankas (2023)

Analizuojant elektros vidutinės metinės kainos už 1 MWh pokyčius Lietuvoje 2019-2022 m. (6 pav.), stebimas ženklus elektros kainos pokytis. 2019 metais elektros vidutinė metinė kaina už 1 MWh siekė 46,12 eurų, o 2020 metais – 34,04 eurų (t. y. 26,2 procento mažiau nei 2019 metais).

Vertinant elektros vidutinės metinės kainos pokyčius kitais laikotarpiais pastebime, kad 2021 kaina siekė 90,45 eurų (t. y. 165,7 procento daugiau negu 2020 metais). 2022 metais elektros vidutinė metinė kaina už 1 MWh padidėjo iki 230,23 eurų (t. y. 154,5 procento daugiau nei 2021 metais).

Vienas iš veiksnių, lėmusių elektros vidutinės metinės kainos svyravimus, buvo Baltijos šalių energetinės rinkos integraciją su Vakarų Europos elektros tinklais. Taip pat svarbus veiksnys – pasaulinė energijos kainų krizė, lemiama Ukrainoje vykstančio karinio konflikto. Svarbus kintamasis, turintis tiesioginės įtakos elektros kainai taip pat yra dujų kainos, kurios Lietuvoje yra esminis šaltinis elektros gamybai. Manoma, kad elektros kainų mažėjimą 2019-2020 m. galėjo lemti elektros vartojimo sumažėjimas dėl ekonomikos nuosmukio, uždarytų įmonių ir pramonės sektoriaus stagnacijos.

Naftos kainos metinis pokytis. Nafta yra vienas iš pagrindinių pasaulio energijos šaltinių. Jos kainos svyravimai gali turėti įtakos ne tik energijos, bet ir daugelio kitų pramonės šakų, tokių kaip chemijos ar sintetinių medžiagų, sąnaudoms. Taip pat naftos kaina yra susijusi su pasaulio geopolitiniais įvykiais, o tai reiškia, kad šių kainų pokyčiai gali atspindėti platesnius pasaulio ekonominės ir politinės situacijos pokyčius (Istiak ir Alam, 2019).



7 pav. Naftos kainos metinis pokytis 2019-2022 metais
Šaltinis: Lietuvos bankas (2023)

Analizuojant Lietuvos naftos kainos metinį pokytį 2019-2022 metais (7 paveikslas), nustatyta, kad 2019 metais naftos kaina mažėjo 1,5 procento. 2020 metais naftos kainos sumažėjo 20 procentų. Manoma, kad naftos kaina kito dėl mažėjusių gamybos ir prekybos kiekių, lemiamų Covid-19 pandemijos. 2021 metais naftos kaina išaugo 40 procentų (t. y. 60 procentų daugiau lyginant su 2020 metais). Naftos kainų augimas siejamas su ribojančių sprendimų mažėjimu, siekiant suvaldyti Covid-19 pandemiją ir OPEC šalių (*angl. Organization of the Pretroleum Exporting Countries*) susitarimu, reguliuojant naftos gamybos mastą (Prisecaru, 2021). 2022 metais naftos kainos pokytis lyginant su 2021 metais išliko gana stabilus.

1 lentelė. Koreliacijos koeficientai

	BVP metinis pokytis	Infliacijos metinis pokytis	Importo metinis dydis	Eksporto metinis dydis	Degalų kainų metinis pokytis	Elektros vidutinė metinė kaina	Naftos kainos metinis pokytis
BVP metinis pokytis	**1**	-0,157	-0,098	-0,015	0,153	-0,106	0,525
Infliacijos metinis pokytis	-0,157	**1**	0,998	0,90	0,929	0995	0,684

Importo metinis dydis	-0,098	0,998	**1**	0,990	0,951	0999	0,7307
Eksporto metinis dydis	-0,015	0,980	0,990	**1**	0,982	0994	0,809
Degalų kainų metinis pokytis	0,153	0,929	0,951	0,983	**1**	0957	0,904
Elektros vidutinė metinė kaina	-0,106	0,995	0,999	0,994	0,957	**1**	0,742
Naftos kainos metinis pokytis	0,525	0,684	0,731	0,810	0,904	0,742	**1**

Šaltinis: sudaryta autorių (2023)

Aukščiau pateiktoje lentelėje (1 lentelė) analizuojamas koreliacijų tarp skirtingų ekonominio pobūdžio kintamųjų koeficientas. Analizuojant BVP metinio pokyčio rodiklio koreliacinius ryšius su kitais kintamaisiais pastebime, kad augant BVP, infliacija šiek tiek mažėja, bet koreliacinis ryšys yra silpnas. Pastebima, kad BVP metinis pokytis turi vidutinį teigiamą ryšį su naftos kainų metiniu pokyčiu. Tai reiškia, kad didėjant naftos kainoms, BVP taip pat gali augti. Infliacijos metinis pokytis rodo labai stiprų teigiamą ryšį su eksporto metiniu dydžiu, degalų kainų pokyčiu ir elektros vidutine metine kaina Eur už 1 MWh. Tai reiškia, kad kai infliacija didėja, šie rodikliai taip pat didėja. Importo metinis dydis parodo labai stiprų teigiamą ryšį su dauguma kitų kintamųjų, ypač su eksporto metiniu dydžiu ir elektros vidutine metine kaina. Taigi, kai importas didėja, šie kintamieji taip pat didėja. Analizuojant apskaičiuotus rodiklius pastebime, kad eksporto metinis dydis yra teigiamai susijęs su importo metiniu dydžiu eurais ir degalų kainų pokyčiu. Tai parodo, kad didėjant eksportui, šie kintamieji taip pat tendencingai didėja. Degalų kainų pokytis turi stiprius teigiamus ryšius su visais kintamaisiais, išskyrus BVP metinį pokytį, kuris yra gana silpnas. Tai rodo, kad degalų kainų pokyčiai gali būti susiję su kitais ekonomikos veiksniais. Elektros vidutinė metinė kainos koreliacijos koeficientai rodo labai stiprų teigiamą ryšį su kitais kintamaisiais, ypač su infliacijos metiniu pokyčiu ir importo metiniu dydžiu eurais. Tai gali reikšti, kad didėjant šiems rodikliams, elektros kaina taip pat gali tendencingai didėti. Galiausiai, naftos kainos metinis pokytis proc. turi stiprius teigiamus ryšius su visais kintamaisiais, išskyrus BVP metinį pokytį, kuris yra vidutinio stiprumo.

Apibendrinant, galime teigti, kad 2019–2022 m. laikotarpis buvo itin dinamiškas ir reikšmingas geopolitinei padėčiai, kuri paveikė Lietuvos ir kitų šalių ekonomiką. Rusijos invazija į Ukrainą ir Covid-19 pandemijos plitimas sukėlė didelius ekonominius šokus, įtakojančius tarptautinės prekybos santykius, investicijų srautus ir pasitikėjimą rinkomis. Pasaulio ekonomikos rodikliai yra tarpusavyje susiję ir jie gali būti laikomi reakcijos į pasaulio geopolitinius įvykius indikatoriais.

IŠVADOS

1. Geopolitika turi tiesioginį poveikį ne tik politiniams sprendimams, bet ekonomikai ir verslui. Geopolitiniai nesutarimai, kariniai konfliktai ar kitokie įvykiai gali sukelti prekybos barjerų atsiradimą, kapitalo ir investicijų srautų pokyčius. Išanalizavus Lietuvos statistikos departamento ir Lietuvos banko duomenis, galima teigti, kad 2019-2022 metais Rusijos invazija į Ukrainą ir Covid-19 pandemija yra pagrindiniai geopolitiniai įvykiai, turėję didelį

poveikį pasaulinei ekonomikai, ypač Lietuvos ekonomikai ir verslui. Dėl pasikeitusios geopolitinės situacijos pakito infliacija, bendrasis vidaus produktas, importas, eksportas, degalų metinė kaina, elektros vidutinė metinė kaina už 1 MWh ir naftos metinė kaina. Tai rodo, kad ekonomikos reaguoja į geopolitinius iššūkius.

2. Infliacijos, importo, eksporto, degalų kainų pokyčio bei elektros kainos rodikliai yra glaudžiai tarpusavyje susiję ir dažnai veikiami tų pačių ekonominių ir geopolitinių veiksnių. Stipri tarpusavio priklausomybė indikuoja makroekonominių pokyčių svarbą bei įtaką įvairiems sektoriams. Lietuvos ekonomikos stabilumui užtikrinti reikalingas nuodugnus ir tikslingas šių rodiklių stebėjimas ir analizė, reaguojant į išorės veiksnių sukeltus iššūkius.

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REVIEWER'S IDENTITY: NAVIGATING THE THICKET OF MULTIPLE IDENTITIES

JELENA ZASCERINSKA
Centre for Education and Innovation Research, Latvia

Abstract

Peer review aims at the evaluation of the quality of the submitted research work by experts in the scientific field. Despite of a high importance of peer review in science, reviewer multiple identities are under-explored in scientific literature. The aim of the present research is to analyse scientific literature underpinning the formulation of the definition of reviewer multiple identities for the peer review process. The present work deploys the qualitative research design. The exploratory research has been implemented in this work. The use of the exploratory research was inspired by five case analysis to be presented in this research. The theoretical investigation and analysis of case studies allow defining a reviewer identity and reviewer multiple identities. The analysed case studies from both the external and internal perspectives demonstrated that reviewers may have multiple identities. Researcher's diverse identities from the internal perspective might also impact his/her review written in the Journal's evaluation form. Reviews implemented by reviewers with multiple identities from the external perspective are found beneficial for the review process. Reasons of difficulties with navigating the thicket of reviewer's multiple identities are determined. Measures to combat with reviewer's multiple identities are proposed.

Keywords: multiple identities, reviewer's characteristics, review format and content, reviewer's identity, training for reviewers.

INTRODUCTION

Research topicality and problem. Peer review plays an important role in science as peer review is the well-known gatekeeper of publishing sound research (Bolek, Marolov, Bolek, & Shopovski, 2020). Peer review aims at the evaluation of the quality of the submitted research work by experts in the scientific field. Experts in peer review are also known as reviewers. Conventionally, a review is done by two-three reviewers. A review prepared by an individual reviewer relates to the internal perspective, and reviews done by a group of reviewers refers to the external perspective (Zaščerinska, 2011) as shown in table 1.

1 table. External and internal perspectives of reviews

The external perspective	The internal perspective
2 and more reviewers	1 reviewer

Source: prepared by the author

From the internal perspective, a reviewer may be a holder of multiple identities (Picciotto, 2021), e.g. family member, employee, laboratory member, principal investigator, blogger, etc, also known as role models (Zaščerinska, Andreeva, & Aļeksejeva, 2015). Consequently, reviewer's multiple identities impact the individual reviewer's review process and result. Multiple identities of each individual member in the reviewers' group may also influence review process and result. Here by multiple identities of reviewers in a group, scientific discipline, ethnicity, geography, gender, career stage, and sexual orientation, among others are meant (Picciotto, 2021). Table 1 gives an overview of multiple identities from the external and internal perspective.

1 table. Multiple identities from the external and internal perspective

Perspective	**The external perspective**	**The internal perspective**
Number of reviewers	2 and more reviewers	1 reviewer
Aspects of multiple identities	-scientific discipline, -ethnicity, geography, -gender, -career stage, and	Role models: -family member, - employee, - laboratory member,

	-sexual orientation, etc	- principal investigator, -blogger, etc

Source: prepared by the author

Despite of a high importance of peer review in science, reviewer multiple identities are under-explored in scientific literature.

The aim of the research. The research was enabled by the following research question:

- What is reviewer's identity?
- What are reviewer's multiple identities?
- What are reviewers' multiple identities

The aim of the present research is to analyze scientific literature underpinning the formulation of the definition of reviewer's multiple identities for the peer review process.

The research methodology. The present work deploys the qualitative research design. The exploratory research has been implemented in this work. The use of the exploratory research was inspired by five case analysis to be presented in this research. Three cases are discussed from the internal perspective, and two cases are evaluated from the external perspective.

The research results. The theoretical investigation and analysis of case studies allow defining a reviewer identity. The analysed case studies from both the external and internal perspectives demonstrated that reviewers might have multiple identities. Researcher's diverse identities might also impact his/her review written in the Journal's evaluation form. Reviews implemented by reviewers with multiple identities from the external perspective are found beneficial for the review process. Reasons of difficulties with navigating the thicket of reviewer's multiple identities are determined. Measures to combat with reviewer's multiple identities are proposed.

Originality/Value of the article. The value of the article is revealed by proposed three newly developed definitions. One definition will explain reviewer's identity, another - reviewer's multiple identities, and the third one - reviewers' multiple identities.

The presented work is original as it considers reviewer identity from two perspectives: external and internal. It should be noted that the phenomenon of reviewer identity is under-explored by the scientific community. Only few works discussed further in this article exist, e.g. Picciotto, 2021. The reviewer identity is analysed by Picciotto (2021) from the internal perspective only.

The novelty of this work is determined by the reasons and measures proposed to enhance the quality review process and result.

RESEARCH METHODOLOGY

The present research employed the qualitative research design. The exploratory research implemented in this work was an inductive process to gain understanding (Edgar & Manz, 2017). The exploratory research was carried out within the interpretive research paradigm. The use of interpretation was based on the researcher's interest in a phenomenon (Zaščerinska, Aleksejeva, Zaščerinskis, Gukovica, & Aleksejeva, 2021). Interpretation allowed meanings to emerge and to be revealed by the researcher (Zaščerinska, Aleksejeva, Zaščerinskis, Gukovica, & Aleksejeva, 2021). The researcher served as the interpreter (Ahrens, Purvinis, Zaščerinska, Miceviciene, & Tautkus, 2018) in this work.

Both theoretical as well as empirical methods were applied in this investigation. The theoretical methods focused on the analysis of theoretical sources and theoretical modelling

(Ahrens, Zascerinska, & Melnikova, 2019). The present work was based on the case analysis. Case analysis is used for the exploration of any phenomenon that is of interest to the researcher (Zainal, 2007). The case analysis in the present work was leveraged for understanding the problem of reviewer's identity. Also, the case analysis was used for analytical generalizing, e.g. to theoretical propositions and theories (Yin, 2003). The case study does not intend to result in statistical generalization (Yin, 2003). Case studies have an important function in generating new research questions, hypotheses and building theory (Kohlbacher, 2005).

The data were collected from observations. Observations are a qualitative method (Zascerinska, Emet, Usca, & Bikova, 2023). The data were processed via content analysis. Content analysis implied (Mayring, 2000)

- structuring content analysis and
- summarizing content analysis.

Structuring content analysis assists in categorising the data in accordance to the previously determined criteria (Budde, 2005). In turn, summarizing content analysis seeks to reduce the material in such a way that the essential contents are preserved, but a manageable short text is produced (Mayring, 2004). Summarising content analysis was leveraged to outline the important findings of the study (Ahrens, Zascerinska, Bhati, Zascerinskis, & Aleksejeva, 2021).

The research methodology was implemented in the main three phases (Ahrens, & Zascerinska, 2020):

- Phase 1 Exploration was devoted to the case analysis and the investigation of the scientific literature.
- Phase 2 Analysis was aimed at the processing of the collected data.
- Phase 3 Hypothesis Development highlighted the elaboration of the definition of reviewer's identity.

RESEARCH RESULTS

In order to define reviewer's multiple identities for the peer review process, the term "identity" is considered.

By identity, a set of characteristics that define or distinguish a person, a group or a thing from others is meant (Olajimbiti, 2019). Consequently, reviewer's identity means an individual combination of characteristics that allows for this individual's affiliation as a member of peer review group also known as Conference Scientific Committee, or Journal's Editorial Board, or similar.

Identities are closely linked with role models (Arhipova, 2018) as identity is an element of role model (Zaščerinska, Andreeva, & Aļeksejeva, 2015). Role models help in guiding individual's personal development, making important decisions that affect the human well-being and finding satisfaction and fulfilment in individuals' lives (Zaščerinska, Andreeva, Glonina, Zaščerinskis, & Aļeksejeva, 2016). For example, a reviewer can combine his/her reviewer identity with the other roles (Picciotto, 2021), e.g. family member, employer, researcher, climate activist, principal investigator, blogger, etc. Therefore, reviewer's multiple identities can be defined as an individual combination of identities and role models. Reviewer's multiple identities refer to the internal perspective (Zaščerinska, 2011). Thus, multiple identities of reviewers in a group mean a combination of individuals' identities and role models. Multiple identities of reviewers in a group refer to scientific discipline, ethnicity, geography, gender, career stage, and sexual orientation, among others are meant (Picciotto, 2021). Table 2 summarizes the definitions of multiple identities from the external and internal perspectives.

2 table. Definitions of multiple identities from the external and internal perspective

Perspective	The external perspective	The internal perspective
Definition	a combination of individuals' identities and role models	an individual combination of identities and role models
Aspects of multiple identities	-scientific discipline, -ethnicity, geography, -gender, -career stage, and -sexual orientation, etc	-family member, - employee, - laboratory member, - principal investigator, -blogger, etc

Source: prepared by the author

Reviewers are internationally recognized Journal's experts in the scientific field and represent the scientific profile of the Journal, thereby recognition by external authorities prevails.

Conventionally a scientific paper is evaluated by three anonymous reviewers. Reviewers are experts who validate a scientific paper, also defined as a written paper which describes the original research results (Tanti, 2014). Scientific paper does not have to be adapted to a level of a non-experienced or non-qualified reader. Publication adaptations to a reader's level are widely practiced in mass media. Scientific paper has to contain original research results to be evaluated by experts or, in other words, reviewers. Validation of scientific paper is based on scientific criteria (not on business criteria, not on economic criteria, not on art criteria, etc.) evaluated in the process of review of the scientific paper. Validation of scientific paper is reflected in the scientific paper evaluation form elaborated by the publishing institution.

Reviewers also may check if there is any scientific misconduct in the submitted work. Scientific misconduct is defined as FFP (Resnik, 2014):

- fabrication,
- falsification, or
- plagiarism, or
- other serious deviations from accepted research practices.

In his work, well acknowledged by the scientific community, Resnik (2014) indicates that "Misconduct does not include ... differences of opinion about research methods. The differences of opinion also refer to formulations in the description of research methods".

Reviewer's promotion of their own theories or suppressing competing research groups is classified by Resnik (2014) as research ethics misconduct.

A method means the set of procedures which shows how findings have been arrived at (Cohen, Manion, Morrison, 2007). Thus, for the method description, the important is to describe the procedures in such a way that methods can be repeated with the same or other materials and thereby to test the results (Cohen, Manion, & Morrison, 2007). Hence, the focus is on the procedures and materials of the empirical study. As you can see important is to describe the procedures. Due to the data protection and the confidentiality of a study participants, researcher's involvement in the method implementation does not have to be specified and described.

Researchers choose the most appropriate method (Cohen, Manion, & Morrison, 2007).

An empirical study consists of at least two stages:

- data collection and
- data analysis.

Also, due to the data protection and confidentiality requirements prescribed by the research ethics, the anonymity of respondents and study participants have to be assured. That is why no any reference (website or similar) has to be given in a scientific paper.

The passive voice and impersonal constructions are the hallmarks of professional, academic discourse (Horbowicz, Skrzypek, Sobkowiak, & Kolaczek, 2019). Passive Voice in scientific writing is widely acknowledged as the effective means for the description of procedures.

CASE DESCRIPTION AND ANALYSIS

During the implementation of the responsibilities of researcher, journal reviewer, agencies' expert, several case studies in relation to reviewers' identities were observed from the external and internal perspectives.

Review from the internal perspective

This part of the work discloses some observed cases on reviewer's multiple identities from the internal perspective.

CASE 1: There was a case when a reviewer did not accept a contribution till the name of a particular country in the paper was deleted. Probably, the reviewer mixed his identities of the reviewer and politician, or a member of a competing research group.

CASE 2: Another case related to the citation of a particular researcher. The paper was not accepted until the name of the cited researcher was deleted from the list of references. We can only guess here about the combination of multiple identities of the reviewer:

- reviewer and a member of a competing research group?
- reviewer and a policy maker? Etc.

CASE 3: One more case is described in detail and, later, analyzed.

Case Description: First, the chronological events are introduced:

1. A paper written in English by the international research team was submitted to an international scientific Journal via the electronic submission system for review on the 28th September 2020.
2. The Journal's reviews were obtained on October 19, 2020.
3. The revised version of this paper was submitted to the Journal on November 2, 2020.
4. The scientific paper was accepted by the Journal for publication on December 15, 2020 and later published.
5. The review by an employee, who voluntary reviewed the previously positively reviewed and published scientific paper, from the organization involved in the development of education in Germany was received by the authors' institution on the 12 October 2021. It should be pointed that the reviewe was written in German on the letterhead of the employee's organization.
6. Informal consultations between the German parties moderated by the author's institution, located in Germany as well, took place between 12 October – 16 November 2021.
7. Author's institution non-officially recommended to contact the Journal, in regard to the review of the scientific paper, already published in the Journal, sent to the author's institution in Germany by the employee from the organization involved in the development of education in Germany on the 16 November 2021.
8. The international research team members informed the Journal about the review by the employee on the 28 November 2021.
9. The Journal invited the Scientific Editorial Board of the Journal and the Ethics Commission for consultations. After consultations, The Journal acknowledged the

right of the authors to choose the research method and express their opinion on the researched phenomenon. Moreover, the employee was qualified as a reader.

During the informal consultations, the employee from the organization involved in the development of education in Germany explained that he is a PhD student in one of the universities in Germany. As the review was written on the organisation's letterhead, the working responsibilities of the employee from the organization involved in the development of education in Germany were analyzed. His working responsibilities included

- Participation in Boards of trustees
- Individual financing of studies / student loans
- Tuition fees
- Student Services / Student Services Organisations
- State higher education acts
- Reform monitoring
- Governance.

The organisation's website did not show that the employee
- is involved in scientific work,
- is a scientist /researcher, and
- has obtained a scientific degree.

It should be stressed that the scientific paper was written in English while the employee's review was available in German only as German was the employee's native language. The employee addressed his review only to the author's institution in Germany despite it is a general practice that the Journal's Publishing Ethics prescribes that all the communication has to be addressed to the Journal's Editor-in-chief. The other members of the international research team were excluded from the review evaluation process by the institution in Germany. The co-authors from other countries were not given an opportunity to express their opinion on the employee's review.

The employee's review focused on two scientific issues:

1. The overall review of the previously positively reviewed and published scientific paper.
2. The description of the method in the positively reviewed and published scientific paper.
3. Use of the video, available on his organisation's website, by the international research team members for the data collection.

In his review, the employee evaluated the positively reviewed and published scientific paper as "trivial".

Also, the employee raised his concerns in regard to the method description in the positively reviewed and published scientific paper. The employees complained about

- The choice of the method of data collection (focus group interview),
- A degree of the researcher's involvement in the focus group interview,
- The format of the focus group interview, e.g. in person, online, video-recorded, blended, hybrid, hyflex, etc.,
- The role of the researcher in the moderation of the focus group interview.

Case Analysis: The use of the organisation's letterhead in the employee's review about the positively reviewed and published scientific paper can be considered as the private use of corporate resources and, consequently, Corporate Ethics misconduct.

Scientist's Ethics Misconduct in this case was revealed by the fact that the employee was not an invited reviewer for the positively reviewed and published scientific paper. It means that he is not an expert in the scientific field, and he does not represent the scientific profile of the Journal. The employee, being a PhD student, did not provide any justification of his conclusion that the positively reviewed and published scientific paper was "trivial". No scientific criteria, he based his conclusion on, were shown, too. The employee wrote in his review about "an impression" as his criteria of evaluation of the positively reviewed and published scientific paper. He did nor clarify whose impression he meant: his private, Head of Department in the organisation, PhD student, expert, twitter or similar reader, etc. No further clarification of "impression" in terms of indicators was provided by the employee. Contrary, evaluation of a scientific work or research project is conventionally based on the well-established and clearly explained scientific or research criteria and indicators. "Impression" has never been included in the evaluation form to review a scientific work. Consequently, "impression" is not a scientific criterion. In accordance with the Latvian Academy of Sciences (2017) "2.4. A scientist must only take on the types of scientific tasks that they are adequately qualified to undertake". From these, the employee was not qualified to undertake any scientific review as he was not a scientific degree holder or expert in a scientific field. His non-qualification was also well-recognizable in his suspect of scientific misconduct the positively reviewed and published scientific paper. The employee did not clarify what he exactly meant by scientific misconduct in the positively reviewed and published scientific paper: fabrication, falsification, plagiarism, or other serious deviations from accepted research practices. Suspecting others without giving a reason or an explanation is certainly Scientists' Ethics misconduct. The employee was not even aware that any differences in the authors' opinions about research methods (focus group interview and empirical study) and their formulations with the use of Passive Voice were not identifiable as scientific misconduct. Consequently, the employee's evaluation of the positively reviewed and published scientific paper without a proper scientific qualification and without the use of scientific criteria, was defined as Scientists' Ethics misconduct.

There was also misrepresentation of the employee's scientific/research interests in the positively reviewed and published scientific paper as the employee confirmed that he firstly represented the interest of the organisation. That was qualified as Research Ethics misconduct. The employee in his review promoted the reference to his organisation and the link to the video in the already previously positively reviewed and published scientific paper. Doing that, the employee insisted on the breach of confidentiality such as disclosing the identity of individuals or groups involved in research (both researchers and respondents). The employee failed to acknowledge the conflicts of interest between himself as the organization's member (having access to the participants who took part in the focus group interview) and himself as the prospective researcher (being a PhD student). The employee did not observe legal and ethical requirements in terms of the anonymity and confidentiality of the study participants (both researchers and respondents) insisting to indicate who did what and disclosing the participants' identities. Moreover, the employee's belonging to a competing research group either at his organisation or his PhD study group intended to suppress the authors of the scientific paper to introduce the changes, he proposed, into the positively reviewed and published scientific paper. By promoting the changes in the positively reviewed and published scientific paper, the employee promoted his own theory how the positively evaluated scientific work has to be done and presented. The misrepresentation, the breach of duty of care, suppressing a competing research group and promoting his own theories how the positively evaluated scientific work has to be done and presented by the employee was identified to be Research Ethics Misconduct.

The employee wrote his review only in German as German was his native language. However, the positively reviewed and published scientific paper was in English. Further on, the employee addressed his reviewe only to an author's institution in Germany. The other members of the international research team were excluded from the review evaluation process by the institution and were not given an opportunity to express their opinion on the situation related to the published scientific paper. The Journal's Publishing Ethics prescribes that all the communication has to be addressed to the Journal's Editor-in-chief. From these, non-involvement of the Journal's Editor-in-chief as well as the paper's co-authors in the evaluation of the employee's review was determined as the Journal's Publishing Ethics misconduct by the employee.

It should be pointed that the author's institution in Germany revealed that the Intellectual property rights on the video in the positively reviewed and published scientific paper were not infringed as the video was publicly available and did not have any copyright signs and features.

Case Analysis Findings:

1. Reviewer is an internationally recognized expert in a scientific field. Acknowledgment by external authorities prevails.
2. Scientific paper has to be evaluated on the basis of scientific/ research criteria.
3. Scientific paper does not have to be adapted to a level of a non-experienced or non-qualified reader. Publication adaptations to a reader's level are widely practiced in mass media.
4. PhD student is not qualified to undertake any scientific review as PhD student is not a scientific degree holder or expert in a scientific field.
5. Reviewer's promotion of his/her own theories on how the positively evaluated scientific work has to be done and presented in the positively reviewed and published scientific paper and his/her suppressing a competing research group is Research Ethics misconduct.
6. Differences in opinions about research methods and their formulations with the use of Passive Voice are not scientific misconduct.
7. One non-qualified reviewer is not sufficient to make a conclusion about a scientific paper. Three anonymous reviewers, who are experts in the scientific field and represent the scientific profile of the Journal have to evaluate a submitted contribution.
8. Paper review is not one word evaluation. Paper review is based on scientific/ research criteria reflected in the Journal evaluation form.
9. Criteria for a scientific paper review cannot be a non-scientific criterion "impression". Scientific criteria are identified by the Journal.
10. Updates in the scientific paper cannot be adaptations to a non-experienced or non-qualified reader's level. Updates for a paper are proposed by the Journal's reviewers.
11. Scientific misconduct does not include differences of opinion about research methods.
12. The use of Passive Voice does not make study information falsified.
13. Non-involved employees and researchers who do not take part in the investigation cannot prescribe the use of methods in research. Researchers, who do the research choose a method and describe it.

14. The focus in the method description is not on who did what. The focus in the method description is on the procedures and materials used in a study.
15. Use of Passive Voice in scientific paper is not intended to help identify who did what. Passive Voice is the hallmarks of professional, academic discourse.
16. Passive Voice is the effective means for the description of procedures.
17. Passive Voice, being a feature of professionally done scientific work, ensures data protection and study participants' confidentiality.
18. Data in a study is not collected for an organisation's promotion. The main intention is respondents' data protection. The study data are as open as necessary, since the population might be well delimited, and sample components could be identified despite the researchers' efforts to keep data anonymous.
19. The reference to the study participants (both researchers and respondents) is not to promote their belonging to any organization. Confidentiality of the study participants is the priority in research.
20. Reviewer's promotion of their own theories is realized as Research Ethics misconduct.
21. Reviewer's suppressing competing research groups means Research Ethics misconduct.
22. The breach of confidentiality such as disclosing the identity of individuals or groups involved in research (both researchers and respondents), for example, via the link to a video implies Research Ethics misconduct.

These case studies help realize that reviewers are internationally recognized experts. External recognition in acknowledgement of expert competence prevails. Reviewers may have different combinations of identities: reviewers, head of department, entrepreneur, researcher from a competing research group, politician, policy maker, etc.

Review from the external perspective

CASE 4: One case of a research project evaluation was observed. The review process was carried out by three reviewers from three different countries, namely, Israel, Latvia, and United Kingdom. Two reviewers were female, and one reviewer – male. All the three reviewers were internationally recognized experts in linguistics and philology by a European organization for funding research and innovative networks. The organisation provided an evaluation form with specific criteria for evaluation. First, each reviewer evaluated the research project individually, and later, a common discussion for all the three reviewers was organized. During the common discussion, three reviews previously done individually were revealed to have many commonalities in all the scientific criteria. Here, despite the reviewers' multiple identities (scientific field, research culture, geography, gender, etc), reviewers' multiple identities contributed to the quality of review.

CASE 5: Another case was also connected to the evaluation of a research project for a European Agency. Reviewers were from three different countries, too. All the three reviewers were females. Their expertise in the field of entrepreneurship was recognized by this European Agency. Similar to the previously discussed case, first, the reviewers evaluated the research project individually. When the time came to prepare a consensus report on the research project, two reviewers had a very similar evaluation of the research project while the third one presented her evaluation with low grades. Moreover, she rejected to explain her low evaluation. Thus, a reviewer's multiple identities impacted her individual evaluation of a research project in a negative manner. While the multiple identities of two other reviewers assisted in completing the quality review.

Findings of the Study and Discussion

The theoretical investigation and analysis of three case studies from the internal perspective and two case studies from the external perspective allow finding that a reviewer is an internationally recognized Journal's experts in the scientific field and represent the scientific profile of the Journal. External recognition of reviewer's expertise prevails. A prospective reviewer cannot appoint him/herself to be a reviewer. Reviewer's expertise is acknowledged by awarding him/her a scientific degree in a scientific field. Reviewer's scientific degree must assure that the reviewer

- is familiar with the scientific language of a scientific paper,
- is able to recognize powerful use of effective means of language structures used in a scientific paper, and
- demonstrates the ability to explain him/herself in a foreign language,
- shows the art of participation in a scientific discussion (Zogla, & Lubkina, 2020).

Reviewer evaluates a scientific contribution on the basis of scientific criteria. Reviewer expresses his/her opinion about a scientific paper in the evaluation form prepared by the publishing house or Journal. Reviewer must not impose on the authors his/her views on the choice of methods and the interpretation of the results.

The analysed five case studies demonstrated that reviewers might have multiple identities. Differentiation between reviewer's multiple identities might be unclear for the reviewer him/herself. Researcher's diverse identities from the internal perspective might also impact his/her review written in the Journal's evaluation form. Reviewers' multiple identities from the external perspective are beneficial for the review process.

The present research is limited by the number of cases studied in this work. The increase in the number of cases to be studies might bring researchers to different results. Another limitation is that reviewer identity is under-explored topic. If more scientific research on reviewer identity is published, then other results might be achieved.

One of the reasons of difficulties with navigating the thicket of reviewer's multiple identities is the lack of training on the review process and review relevant aspects. In most cases, journals rely on the reviewer's experience previously obtained in similar situations. With the incorporation of Artificial Intelligence (AI) and ChatGPT into scientific writing by many researchers as well as the lack of regulations relevant to the leverage of AI and ChatGPT in research work, there is an urgent need in reviewers' training. The training course for reviewers could focus on the review format and content.

CONCLUSIONS

1. The literature analysis allows for the conclusion that researcher's identity is an individual combination of characteristics that facilitates the individual's affiliation as a member of peer review group.
2. Reviewer's identity is characterized by the individual's holding of a scientific degree, international recognition as an expert in a scientific field, representation of the scientific profile of the Journal, competence in scientific writing, skills in the use of a foreign language knowledge of scientific criteria for the evaluation of a scientific paper, ability to provide his/her evaluation of a scientific paper in a Journal's evaluation form.

3. Reviewer's multiple identities refer to the internal perspective, and from the internal perspective can be defined as an individual combination of identities and role models such as family member, entrepreneur, etc. While reviewers' multiple identities relate to the external perspective and from the external perspective mean a combination of individuals' identities and role models of reviewers in a group, related to scientific discipline, ethnicity, geography, gender, career stage, among others.
4. The analysis of five case studies revealed that reviewers may have multiple identities. The case studies demonstrated that some reviewers are not able to navigate between their multiple identities, e.g reviewer and head of department, or reviewer and politician, etc. Reviewer's multiple identities impact the evaluation of a scientific paper. The review process undertaken by reviewers with multiple identities from the external perspective is beneficial. There is an urgent need in reviewers' training. The training course for reviewers requires to discuss both review format and review content.
5. An updated research question is put forward: What is reviewer's influence of his/her multiple identities on the evaluation of a scientific paper? Further research intends to carry out a quantitative study of reviewer's influence of his/her multiple identities on the evaluation of a scientific paper.

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