

# Methodology and methods of sociological studies

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G.G. TATAROVA, G.P. BESSOKIRNAYA, A.V. KUCHENKOVA

## SUBJECTIVE WELL-BEING AT WORK: RESEARCH PRACTICES OF SOCIOLOGICAL MEASUREMENT

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*Galina G. TATAROVA – Doctor of Sociology, professor, chief research officer (tatarova-gg@rambler.ru); Galina P. BESSOKIRNAYA – Candidate of Economics, associate professor, senior research officer (gala@isras.ru); Anna V. KUCHENKOVA – Candidate of Sociology, associate professor, senior research officer (a.v.kuchenkova@gmail.com). All – Institute of Sociology, Federal Center of Theoretical and Applied Sociology of the Russian Academy of Sciences, Moscow, Russia.*

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**Abstract.** *The article considers the existing research practices of studying subjective well-being in the world of work. The problems of sociological measurement of “subjective well-being at work” as a collective concept for setting the attitude to work, reflecting both social ideas about “favorable” situation in the workplace and evaluation of its various aspects in “here and now” situation are actualized. The sociological measurement is understood as an approach, which is based on the targeting of the search for controllable factors related to the preservation and development of the human potential of the organization (enterprise). “Axiomatic provisions” are formulated based on theoretical and methodological generalizations of research practices of studying subjective well-being in the world of work abroad and in Russia, as well as exploratory studies of the authors. Among the research practices, special attention is paid to those where typological models based on the ideas of reconstruction of social types among employees and interpretation of the typological structure of employees as an object of functional management are implemented.*

**Keywords:** *subjective well-being in the world of work • subjective well-being at work • sociological measurement • research situation • typological model • typological structure of employees • employee identification with the enterprise • balance between job evaluations and job claims • controllable factors*

**DOI:** 10.31857/S013216250017620-5

This article is a translation of: Татарова Г.Г., Бессокирная Г.П., Кученкова А.В. Субъективное благополучие на работе: исследовательские практики социологического измерения // *Sotsiologicheskie Issledovaniia*. 2021. No 10: 37–49. DOI: 10.31857/S013216250015546-3

**Research Objectives.** The flow of research in the social sciences, where the key phenomenon is “subjective well-being,” is constantly growing, which makes it relevant to analyze the specifics of the sociological measurement, as opposed to psychological and economic one. Judging by the publications, on the one part, there is less discussion of theoretical and methodological issues related to the specifics of conceptual models used to measure subjective well-being and their adequacy to the sociologist’s research objectives. On the other part, the accumulated huge amount of empirical research (including the fields related to sociology) creates conditions for certain generalizations and actualizes a number of conceptual problems

of sociological measurement of subjective well-being in relation to the world of work. Subjective well-being in the world of work is considered using concepts that differ substantially in their content. Among the most frequently used in foreign publications are: *quality of work life*, *work-related subjective well-being*, *workplace well-being*, *subjective well-being in organization*. Domestic publications most often use the following concepts: *quality of work life*, *social well-being in the organization*, and *social well-being of employees*. In practice, there is a need for "smaller" concepts for which the process of empirical interpretation is not so open-ended.

We refer "*subjective well-being at work*" to such concepts. We interpret it as a *collective concept for setting the attitude to work, reflecting both social ideas about "favorable" situation in the workplace, and evaluation of its various aspects in "here and now" situation*". The results of our many years of theoretical and methodological exploratory studies under sociological support for managerial decision making at specific enterprises have led us to this connotation.

This definition claims to have a very specific position in the conceptual field of studying subjective well-being in the world of work and does not contradict world practice (the substantiation of this statement is the first objective of this article). Of course, when we move to the empirical level, different models of its study are possible. The appeal to the concept of *subjective well-being at work* arose in the situation of studying the labor indicators of industrial enterprises' workers (the main work at a particular enterprise). The article presents generalizations of research practices (this is the second objective of the article), including theoretical and methodological searches of the authors themselves in the process of analyzing the data of surveys conducted in 2003–2014. Our search was based, firstly, on the developments of famous Russian sociologists, such as A.G. Zdravomyslov, N.I. Lapin, N.M. Naumova, I.M. Popova, V.D. Patrushev, Zh.T. Toshchenko, V.A. Yadov, etc. Secondly, the initial target was to find a "*typological model*" based on reconstructing social types of employees in order to interpret the typological structure itself as an object of functional (as opposed to value-based) management.

An analysis of contemporary research practices abroad and in Russia allows us to formulate a number of provisions (the third objective of the article) that are axiomatic in nature. Some of them are obvious, some, perhaps, disputable, but it makes sense to consider these "*axiomatic provisions*" as methodological prerequisites in the process of developing conceptual models of sociological measurement of subjective well-being at work.

**On research practices of sociological measurement of subjective well-being in the world of work.** Let's recap research practices of measuring subjective well-being as a holistic phenomenon. Let's consider aspects important for actualizing the relevant methodological problems of its sociological measurement in the world of work.

Existing research practices, first of all, differ by what indicator of subjective well-being is exactly designated as target (generalized, common, integral), what kind of partial indicators are used, and how the relationships in the system of indicators are analyzed. Most often "*life satisfaction*" or "*personal happiness*" are used as a target indicator, very rarely – an indicator constructed on their basis<sup>1</sup>. It should be noted: if a derivative indicator acts as a target, then the key objective is to choose a model for measuring the most *generalized* indicator [Tatarova, Kuchenkova, 2020].

A special class should include those research practices where there is no a priori division of indicators into *generalized* and *particular* ones. The main objective for researchers is to *re-construct* the structure of indicators of subjective well-being in different spheres of life. It is this class of practices for measuring subjective well-being in the world of work that is actualized in modern reality. Therefore, we pay special attention to such practices.

One of the methods for measuring subjective well-being as a holistic phenomenon is typological analysis – identifying latent groups that are qualitatively homogeneous in terms of subjective well-being/ill-being nature. The very idea of such an analysis, on the one part, is

<sup>1</sup> In our researches, we prefer to use the concept of "generalized" for an indicator constructed on the basis of the "life satisfaction" and "personal happiness" variables.

quite simple, but, on the other part, attempts to implement it lead to a number of theoretical and methodological problems, important from the position of sociological measurement and having the nature of "*methodological traps*" for the researcher in some cases. They are generated, firstly, by the peculiarities of the indicators of subjective well-being as type-forming features [Tatarova, Kuchenkova, 2016], leading to the conclusion that in sociological research it is equally inappropriate to overcomplicate and oversimplify the conceptual scheme of indicator measurement. Secondly, the specifics of the relationship between the generalized indicator and particular ones, which differ, for example, at various stages of the life cycle [Kuchenkova, Tatarova, 2019]. Thirdly, the peculiar features of the relationship between the "life satisfaction" and "personal happiness" variables [Tatarova, Kuchenkova, 2020]. Fourthly, the lack of proper attention to mediated connections between indicators of subjective well-being and the preoccupation with pairwise, direct connections. Fifthly, a preoccupation (without proper justification) with "summation" procedures at both the individual and group levels of the measurement of subjective well-being.

These plots should be supplemented with the difficulty of comparing the results of various researches, where even the measurement of generalized indicators of subjective well-being occurs through different constructs, which is vividly illustrated by the example of measuring life satisfaction and personal happiness in Russia for the period 1998–2018 [Shirokanova, 2020: 22–24].

It is quite reasonable, at first sight, to assume that the models for measuring subjective well-being in separate life spheres, including work, should be similar to the models of subjective well-being as a holistic phenomenon. Then, in the context of sociological measurement of subjective well-being in the world of work, a generalized indicator can be either *job satisfaction* or *job related happiness*, or an indicator derived from them. Accordingly, assessments of different aspects of work can serve as particular indicators. Adequacy of the use of such assumptions for sociological support of managerial decisions in organizations (enterprises) is very problematic. This concerns, first of all, the heuristic potential of *job satisfaction* as a *generalized* indicator of subjective well-being in the world of work.

The study of job satisfaction as an indicator of subjective attitude to work has a long history in Russia. Back in 1962, in the project "A Person and His Work", the methodology was proposed according to which general job satisfaction and partial satisfaction with the elements of the work situation were measured [Zdravomyslov, Yadov, 2003: 109–134]. Testing of this methodology during numerous studies at industrial enterprises of the country [Popova et al., 1985: 166–167] has led to a conclusion that it is inappropriate to consider labor satisfaction (the authors used this very concept) as an indicator of the degree of satisfaction of employees' needs in the world of work or emotional attitude to work. Labor satisfaction is more closely connected with other components of consciousness than with objective conditions of labor activity. It seems to be no coincidence that in order to measure labor satisfaction it was suggested to refer to objective characteristics of labor collectives [Patrushev, Kalmakan, 1993]. The recent discussion on the pages of the Sociological Journal about the expediency of studying labor satisfaction in empirical studies in modern reality is also of interest [Ilyasov, 2013; Temnitsky, 2013; Tatarova, Bessokirnaya, 2017].

In foreign publications job satisfaction as an indicator of subjective well-being in the world of work is also constantly criticized [Page, VellaBrodrick, 2009: 446–447] due to low values of correlation coefficients with productivity, efficiency of labor activity.

The existing criticism of job satisfaction as a *generalized* indicator does not refer to the measurement of "job satisfaction" as a *particular* indicator of subjective well-being in the world of work. Job satisfaction is used as a *particular* indicator in most models. For example, job satisfaction has been shown to be one of the three key indicators of happiness at work as a generalized measure of subjective well-being at work [Fisher, 2010]. At the same time job satisfaction reflects mainly cognitive judgments about work. The author emphasizes that it is necessary to measure not only general satisfaction, but also particular ones (concerning remuneration of labor, coworkers, management, habitable environment at work).

In our exploratory studies it was substantiated that it makes sense to consider labor satisfaction as one of the three basic type-forming features for the reconstruction of social types of workers by the nature of their identification with the enterprise. We believe that in mass surveys in organizations (enterprises) it is reasonable to return to the logical index formed on the basis of three variables in order to measure job satisfaction [Zdravomyslov, Yadov, 2003: 68–70]. By the way, the opinion that a reliable instrument for measuring job satisfaction should be based not on one question, but on several indicators prevails abroad [Rose, 2001].

Let's move on to a more detailed consideration of research practices of studying subjective well-being in the world of work, which are the most common in the context of constructing models of its measurement. In these practices, the emphasis is placed on the selection of a set of variables initial to form indicators of subjective well-being.

Both special scientific theory and the accumulated experience of empirical studies are used as the basis for the initial selection of variables. As an example of referring to special scientific theory, we can mention a study based on Maslow's well-known theory of needs [Sirgy et al., 2001].

Most practices are characterized by the fact that the initial variables are presented in the form of *judgments*. From the methodological point of view, this allows to create conditions for the application of factor analysis methods, since all variables have the same number of gradations (degrees of agreement with judgments), i.e. ordinal scales of the same dimensionality are used. Judgments are pre-selected by the experts, and then the judgments are subjected to factorization, the results of which are also evaluated by the experts. Ultimately, this leads to a noticeable reduction in the number of variables included in the mass survey instruments. For example, for the development of the WRQoL (working-related quality of life) scale, 200 judgments were formed at the initial stages of the study, 61 of them were selected with the help of experts, and the final list of variables included 23 judgments based on the results of factorization [Van Laar et al., 2007].

The review of scientific literature showed that the initial variables for the analysis include, in addition to production conditions of labor, life satisfaction, balance of positive and negative emotions, psychological subjective well-being [Page, VellaBrodrick, 2009], the impact of work on personal life of employees [Parker, Hyett, 2011; Van Laar et al., 2007; Juniper et al., 2011]. In the context of studying social well-being in the organization, the number of variables fixing production and non-production working and living conditions [Grachev, Rusalina, 2007; Rusalina, 2013] increases, the latter include, for example, housing conditions [Vaskina, Bocharov, 2017]. One of the issues of "Public Opinion Monitoring: Economic and Social Change" (No. 3, 2019) is dedicated to the analysis of work-personal life balance. In this way, a typology of labor behavior strategies of working youth based on their perception of balance/conflict between work and personal life was constructed [Bocharov, 2020]. It should be noted that almost all domestic publications consider work and personal life balance in terms of subjective well-being as a holistic phenomenon, rather than as one of the variables characterizing subjective well-being in the world of work. This approach seems more reasonable.

Mass surveys require a certain simplification of the models for measuring subjective well-being [Leontiev, Osin, 2019]. It is difficult to disagree with this, as well as with the fact that when measuring subjective well-being in the world of work it is necessary to use indicators related only to work, and those of them that can be influenced by the employer. At the same time, researchers propose different indicators and justify models of different dimensionalities. For example, a four-dimensional model for measuring well-being at work by factorizing 31 variables (in the form of judgments) has been substantiated [Parker, Hyett, 2011].

From a methodological point of view, it is important to include variables in the analysis that would help to identify not only the controlled factors, but also their significance (importance). Here is an example. Based on interviews with call center employees 102 different characteristics of well-being at work were formulated (employees were interviewed about what at work affects their overall well-being) [Juniper et al., 2011]. Two questions were asked for each of the characteristics: 1) *Have you experienced this in the past year?* 2) *If yes, how important was*

it to your subjective well-being and was it disturbing? (grades on a 5-point scale from "very important" to "not important at all"). Each characteristic was assigned a *frequency of occurrence* (percentage of employees) and *importance* (arithmetic mean on a 5-point scale). They were used to determine the "contribution" ("weight", "significance") equal to the frequency of occurrence and importance. These assessments made it possible to select the most common 43 characteristics assessed as the most significant.

Scientific literature emphasizes that there are "universal" scales (in the language of sociological measurement – these are procedures), which are suitable for any employment environment. Indicators measured on their basis can be designated as *sustainable*. Two valid procedures are known: QWLS (Quality of Work Life Scale) [Sirgy et al., 2001]; WRQoLS (Work Related Quality of Life Scale) [Van Laar et al., 2007]. The validation of the sustainability of the indicators in the second procedure is substantiated by the results of two studies. In 2007, 1,000 health care workers were interviewed and variables were factorized. As a result, 23 judgments included in 6 factors were selected [Van Laar et al., 2007]. In 2013, this result was confirmed in experiments on a group of police officers [Easton et al., 2013].

Universal scales may not be sensitive to the specifics of this or that type of organization (enterprise) and this or that socio-professional group. That is why works, which deal with substantiation of a system of indicators, adequate for a certain socio-professional group, generate interest [Juniper et al., 2011]. Among research practices particularly stand out those that present attempts to study *positive* and *negative* indicators of subjective well-being at work. For example, the model including five components is offered [Bakker, Oerlemans, 2011], where the following are attributed to "positive": *work engagement, happiness at work, job satisfaction*; to "negative": *workaholism, burnout*.

Judging by foreign publications, there is a competition for the subject field between researchers of the quality of work life (this direction has a long history of development) and subjective well-being in the world of work. In Russia, the issues of studying the quality of work life also have a long history of development and are quite extensive. Approaches to the study, structure and constituent elements of the concept itself, etc., are investigated within its framework. Note that "job satisfaction" is still considered as a determinant of the quality of work life [Temnitsky, 2012]. Thus, the issues of its measurement do not lose their relevance [Tatarova, Bessokirnaya, 2017]. As for the theoretical and methodological grounds from the position of multidimensional measurements of the quality of work life, models of psychological measurement of subjective quality of work life [Ryabov, 2013; Ryabov, 2019], models of measuring subjective economic well-being [Khashchenko, 2011; 2019], methodology of comprehensive analysis of quality of work life [Milyaeva, 2019] were of particular importance for us.

The above plots allow us to state that regardless of the initial theoretical framework for studying subjective well-being in the world of work both in Russia and abroad, researchers are basically concerned with the same theoretical and methodological problems. In our opinion, not only to narrowing ("*subjective well-being at work*") attempts, but also extension ("*social well-being*") attempts are very promising. Both social well-being as a holistic phenomenon [Epikhina et al., 2020] and social well-being in separate life spheres of population activity are equally significant. The accumulated experience (in accordance with the research practices discussed above) allows us to single out several basic *axiomatic provisions* that are reasonable to rely on when developing procedures for measuring subjective well-being at work.

*First.* The core objective of sociological measurement of subjective well-being at work is to find controllable factors related to the preservation and development of an organization's (enterprise's) human potential.

*Second.* In order to measure subjective well-being at work it is reasonable to use only those indicators that can be influenced in the organization (enterprise). The system of variables for the formation of such indicators should be complete enough to reflect the main characteristics of work.

*Third.* It is necessary to distinguish between indicators common to all employees and indicators specific to this or that type of organization (enterprise), this or that socio-professional group.

*Fourth.* Subjective well-being at work is a multidimensional construct in the sense that it has a spatial representation similar to the geometric one, i.e. it is described by an independent system of indicators identified through factorization of initial variables. Accordingly, the factor structure cannot be reduced to a single integral indicator of subjective well-being.

*Fifth.* Favorable conditions for factorization arise when the initial variables for analysis (in most cases of judgment) are set using scales of the same type and dimensionality. These are usually ordinal scales with five gradations. An indispensable attribute in the process of measuring subjective well-being at work is also the sustainability of the factor structure of the variables.

*Sixth.* It is advisable to search for controllable factors not only in the context of singling out individual socio-professional groups of employees, but also using the idea of existence of typological groups within them that differ in the transmission of changes in their subjective well-being at work.

The last of these axiomatic provisions can be implemented in a special class of research practices based on "typological models". Since we have not been able to find such practices, we will try to summarize the results of our exploratory studies.

**On typological models of measuring subjective well-being at work: general provisions.** The development of models for measuring *subjective well-being at work* is largely driven by the research situation, or *sociological contextuality*. In order to illustrate, let's refer to our research situation involving the study of the subjective well-being at work of industrial enterprises' workers. The goal of the sociological measurement was to identify *controllable factors* that influence changes in their subjective well-being at work. At a particular industrial enterprise it is difficult to treat the socio-professional group "workers" as a control object, because it is qualitatively heterogeneous, differentiated by a large number of indicators of labor activity. When searching for controllable factors it is possible to assume: within this group there are (latently) subgroups that are qualitatively homogeneous in the sense that the transmission of change of their subjective well-being at work is presumably the same. In fact, such typological groups can be treated as representatives of different *social types*. At the empirical level, it is more correct to use the term "typological group" instead of "social type" in the situation of limited volume of analyzed data. Moreover, not every group (singled out as a result of classification of analyzed objects according to formal criteria) can be treated as a social type. As we know, there is a problem of transition from classification to typology. *The typological structure* (a set of typological groups), first, is of interest to describe the production situation at the enterprise concisely. Secondly, it can act as an object of functional control (as opposed to value-based control). Thirdly, it serves as a basis for determining the effectiveness of managerial decisions, the orientation of which is selective depending on the typological group (the carrier of the same social type). The procedure of identifying such groups is a priori multistage in nature. Its main stages are determined by the solution of two objectives aimed at developing: the technology of revealing the typological structure, the methodology of searching for "controllable factors".

The grounds that can be used for typological analysis, judging by the reviewed research practices, can be very diverse. The analysis of data from four empirical studies in industrial enterprises has allowed substantiating that in modern Russian reality it is reasonable to use the nature of their *identification with the enterprise as a basis for typology* of workers. The typological structure changes in the direction of increasing the number of "identified" and decreasing the number of "unidentified" workers can be considered as an indicator of the effectiveness of managerial decisions on the use of human potential of the enterprise.

It seems quite correct to refer to the concept of "*identification with the enterprise*" to denote the process of formation of a special kind of identity due to the involvement of people in labor activity at a particular enterprise. It should be noted that the concept of "identification" attracted the attention of domestic sociologists back in Soviet times. An original method



of measuring the identification of an employee with the labor collective was proposed [Nau-mova, 1988: 189–193]. It was based on the construction of Thurstone scale (method of equal-appearing intervals), assuming the existence of a one-dimensional continuum for measuring identification. The initial set of statements presented to the experts contained 300 judgments. They were evaluated by 50 experts (25 men and 25 women, who were 18–50 years old, 22 workers and 28 engineers). As a result of the selection of judgments according to the criterion of consistency of expert opinions, a basic scale was constructed, which included judgments about various aspects of identification (acceptance of standards and values of a production organization; attitude to this job and this enterprise; rational and emotional identification). Unfortunately, this original methodology has not been tested.

In modern reality researchers are interested in conceptual representations of *identification with the organization* in interrelation with such related concepts as *loyalty to the organization*, *commitment to the organization*, *engagement in the activity of the organization*. Reflexion concerning these concepts is mainly represented as part of foreign psychology of organizational management. In the domestic labour sociology of the post-Soviet period, various empirical indicators were tested in order to measure the phenomena associated with this “four” concepts [Av-doshina, 2010; Tukumtsev, Bocharov, 2015]. The results of our experience in testing a number of such indicators allowed us to conclude that *identification with the enterprise* is the most important concept in the process of reconstruction of social types of workers as objects of *functional control*. The use of other popular concepts in the practice of managing the labor activity of workers in industrial enterprises is a matter for the future [Tatarova, Bessokirnaya, 2014]. Of course, this conclusion does not apply to other socio-professional groups of employees.

At the empirical level, *identification with the enterprise* is a multidimensional research construct, a kind of “*conceptual hybrid*” whose heuristic potential is quite high. The hypothesis of the existence of a one-dimensional continuum to measure this phenomenon is implausible. Groups of employees of the *same type* of identification with the enterprise exist only in a multidimensional space. Its dimensionality depends on the type of organization (enterprise) and the socio-professional group studied in it (at it). The attempt to reconstruct this dimensionality for workers of industrial enterprises at the initial stage of our exploratory studies led to the identification of a four-dimensional structure [Tatarova, Bessokirnaya, 2010; Tatarova, Bessokirnaya, 2011], but later the sustainability of three-dimensional structure was justified [Tatarova, Bessokirnaya, 2018]. It is noteworthy that the factor structure of the variables initial for the typological analysis remains sustainable at industrial enterprises located in different regions with different levels of socio-economic development and at industrial enterprises with different forms of incorporation. This is in spite of the fact that in order to measure the variables, indicator questions differing in their wording were used. The three components are identified in the factor structure – *job satisfaction at the enterprise*, *corporate solidarity*, and *labor efficiency*. In turn, each of them is a multidimensional formation and includes several variables. The results of factorization of variables were used to introduce three classification attributes in the form of logical indices and to classify workers according to the nature of their identification with the enterprise<sup>2</sup>. The practical need for determining the effectiveness of managerial decisions in the monitoring mode dictates the advisability of using data specifically on the three-component model of *identification of workers with the enterprise* [Tatarova, Bessokirnaya, 2018].

The methodology of searching for controllable factors relies on the determination of indicators of balance/disbalance between the assessments of elements of the production situation and employees’ claims to work in the “*here and now*” situation. It is reasonable to search for controllable factors according to the typological groups identified. It was found that when moving to the level of analysis by typological groups of workers, identified by the nature of

<sup>2</sup> The technology of building a “typological model” for measuring subjective well-being at work is presented in a series of joint publications by G.P. Bessokirnaya and G.G. Tatarova. In this article, prepared with the three objectives outlined above, we refer only to some of them.

identification with the enterprise, the informational value of such indicators significantly increased [Tatarova, Bessokirnaya, 2019].

Unfortunately, the problem of the typological approach to the measurement of subjective well-being at work does not find proper attention among labor researchers. One of the reasons for this situation is insufficient development of the conceptual frameworks of the sociological measurement of subjective well-being in particular. This is despite the existence of a demand for the development of theoretical and methodological reflection in the study of subjective well-being as a holistic phenomenon [Salnikova, 2017; Trotsuk, 2020].

**Conclusions.** 1. The process of creating procedures for measuring subjective well-being in the world of work as the most important area of employees' activities of daily living should proceed from a number of provisions that have become *axiomatic*. Within the conceptual framework, they relate to the necessity of empirical study of the following: introduction of a clear definition of concepts; designation of the measurement goal; differentiation of indicators common for different groups of employees and specific for one or another socio-professional group; development of a methodology to identify "controllable factors".

In the context of improving the efficiency of interaction between the employee and the employer at the level of specific organizations (enterprises) it seems promising to develop the issues of measuring subjective well-being at work in the direction of creating *typological models*. In such case, the main objectives of sociological measurement are: reconstruction of social types of employees and revealing their typological structure as an object of functional (as opposed to value-based) control; search for controllable factors influencing changes in subjective well-being of employees.

Typological models for measuring subjective well-being at work are at least of a two-stage nature. The first stage introduces the grounds for reconstruction of typological groups, and the second stage determines indicators of balance/disbalance between actual situation at the workplace and employees' claims in "here and now" situation in reconstructed typological groups.

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