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## ***Generativity is a Core Value of the ESJ: A Decade of Growth***

Erik Erikson (1902-1994) was one of the great psychologists of the 20th century<sup>1</sup>. He explored the nature of personal human identity. Originally named Erik Homberger after his adoptive father, Dr. Theodore Homberger, he re-imagined his identity and re-named himself Erik Erikson (literally Erik son of Erik). Ironically, he rejected his adoptive father's wish to become a physician, never obtained a college degree, pursued independent studies under Anna Freud, and then taught at Harvard Medical School after emigrating from Germany to the United States. Erickson visualized human psychosocial development as eight successive life-cycle challenges. Each challenge was framed as a struggle between two outcomes, one desirable and one undesirable. The first two early development challenges were 'trust' versus 'mistrust' followed by 'autonomy' versus 'shame.' Importantly, he held that we face the challenge of **generativity** versus **stagnation in middle life**. This challenge concerns the desire to give back to society and leave a mark on the world. It is about the transition from acquiring and accumulating to providing and mentoring.

Founded in 2010, the European Scientific Journal is just reaching young adulthood. Nonetheless, **generativity** is one of our core values. As a Journal, we reject stagnation and continue to evolve to meet the needs of our contributors, our reviewers, and the academic community. We seek to innovate to meet the challenges of open-access academic publishing. For us,

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<sup>1</sup> Hopkins, J. R. (1995). Erik Homburger Erikson (1902–1994). *American Psychologist*, 50(9), 796-797. doi:<http://dx.doi.org/10.1037/0003-066X.50.9.796>

generativity has a special meaning. We acknowledge an obligation to give back to the academic community, which has supported us over the past decade and made our initial growth possible. As part of our commitment to generativity, we are re-doubling our efforts in several key areas. First, we are committed to keeping our article processing fees as low as possible to make the ESJ affordable to scholars from all countries. Second, we remain committed to fair and agile peer review and are making further changes to shorten the time between submission and publication of worthy contributions. Third, we are looking actively at ways to eliminate the article processing charges for scholars coming from low GDP countries through a system of subsidies. Fourth, we are examining ways to create and strengthen partnerships with various academic institutions that will mutually benefit those institutions and the ESJ. Finally, through our commitment to publishing excellence, we reaffirm our membership in an open-access academic publishing community that actively contributes to the vitality of scholarship worldwide.

*Sincerely,*

***Daniel B. Hier, MD***

*European Scientific Journal (ESJ) Natural/Life/Medical Sciences*

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## Europe and the Digital Enlightenment: Between Autonomy and Algorithmic Power

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### Abstract

This study asks whether Europe is truly living up to its Enlightenment heritage in the digital age, or whether it is drifting away from Kant's ideal of autonomy and moving closer to Foucault's world of invisible algorithmic control. The text compares Kant's and Foucault's views on the Enlightenment and explores how digital technologies-like AI and algorithms-influence personal freedom and social norms. The key question is: Are we thinking for ourselves online, or do algorithms make our choices for us? Western Europe tries to protect autonomy with laws like GDPR or DSA, but can freedom actually be guaranteed by rules from outside? Beyond this philosophical contrast, the study finds that Europe's digital landscape reveals a growing simulation of autonomy: individuals believe they act freely, yet their actions are increasingly structured by algorithmic systems. Western Europe institutionalizes critical reason, while Eastern Europe exhibits fragmented digital autonomy shaped by distrust and weak institutions. The research concludes that Europe's Enlightenment legacy can survive only if autonomy is redefined as technological understanding and critical reflection, rather than formal compliance.

**Keywords:** Enlightenment, Autonomy, Algorithmic power, The dichotomy of the Digital East and West

## Introduction

For centuries, Europe has regarded itself as the continent of the Enlightenment. Inspired by thinkers such as Kant, Rousseau, and Montesquieu, a modern self-conception emerged, grounded in freedom, autonomy, rationality, and the rule of law. Yet the technological and geopolitical transformations of the twenty-first century are fundamentally challenging this image. Artificial intelligence, algorithmic reality, virtual identities, and continuous surveillance all pose unprecedented questions to the legacy Kant described as “emergence from self-incurred immaturity.” Are we truly advancing along the path of autonomy, or are we regressing into a new form of immaturity, now wrapped in digital packaging? While the West continues to identify itself as the heir to the Enlightenment, it may be drifting toward Foucault’s darker vision, in which power no longer represses but instead permeates language, behaviour, and norms. Regulation, while protective, also defines the legitimate boundaries of digital behaviour and the parameters of acceptable knowledge, illustrating the rise of an automated administrative logic of governance (Calo & Citron, 2022). This dilemma is especially apparent when examined through the East–West dichotomy. The West claims a tradition of critical rationality, even as technological control increasingly infiltrates daily life. In contrast, the East often appears to experience digital freedom without the safeguards of critical reflection or robust institutions. Digital modernity, therefore, generates divergent forms of power and subjectivity within Europe itself.

Methodologically, the study adopts a deductive–analytical approach, linking classical philosophical reasoning with contemporary digital realities. The “deductive” component means that the research is theory-driven, grounded in the conceptual frameworks of Kant and Foucault, yet projected onto real social and technological contexts such as social media platforms, digital regulation, and the practices of algorithmic governance. The purpose of this method is not to test hypotheses, but to reveal how philosophical principles illuminate the social and political structures of the digital age. The term “analytical” refers to the study’s focus on conceptual analysis—it deconstructs and examines the interrelations among the categories of freedom, autonomy, and power within the context of digital modernity. This approach draws upon the tradition of classical analytic philosophy, emphasizing clarity of reasoning, conceptual precision, and internal logical coherence.

The research develops a conceptual matrix that juxtaposes Kant’s notion of autonomy with Foucault’s model of power, demonstrating how the Enlightenment tension between freedom and control reappears within the *platform society* (cf. van Dijck, Poell, & de Waal, 2018). Although primarily theoretical in nature, the framework is explicitly designed for empirical application. In my related research (Málik, 2025), this approach has been

applied to concrete cases such as the algorithmic architectures of social media-illustrating how platform curation shapes public discourse and user autonomy-as well as to the institutional dynamics of digital regulation, and to everyday practices like content moderation and recommender systems. These examples demonstrate that the framework is not only interpretive but also operational: it enables critical analysis of how digital infrastructures govern perception and behavior, thereby bridging philosophical critique and empirical inquiry.

### **Narratives of the Enlightenment: Kant vs. Foucault**

In his brief yet influential 1784 essay “What is Enlightenment?”, Immanuel Kant writes: “*Enlightenment is man’s emergence from his self-incurred immaturity. Immaturity is the inability to use one’s understanding without the guidance of another.*” (Kant, 1784/1996, p. 11). This statement has become a foundational tenet of modern European thought. For Kant, immaturity is not an age-related condition but a moral and intellectual dependency: the unwillingness to use reason freely. Enlightenment, therefore, is not merely the accumulation of knowledge but an act of courage; i.e., the capacity for individuals to think, judge, and act autonomously, free from the coercive forces of external authorities such as church, state, or tradition. It is crucial to note, however, that for Kant freedom does not simply mean the absence of coercion, but the self-legislation of reason: autonomy as maturity, the ability to give oneself law through critical reflection, even against one’s own desires or inherited customs. This notion has served as the theoretical foundation for modern liberalism, human rights, and individual freedom. Many regard this Kantian ideal of autonomy as the essence of European civilization. The Enlightenment project did not end in the eighteenth century; its objective remains the same: the liberation of individuals from ignorance, prejudice, and voluntary intellectual subjugation. Kant also recognized that this process is gradual rather than instantaneous. The transition from immaturity is a collective, social endeavour, requiring a culture of independent thinking, robust education, and transparent institutions that nurture individual judgment.

Today, in the digital age, this question re-emerges: Do we think autonomously, or have we entered a subtler form of immaturity? If AI provides the answers and algorithms determine what information we receive, do we still think for ourselves, or is thought occurring elsewhere, on our behalf? For Kant, critique was not a destructive act but a constructive one: reason’s highest function. It was not about disagreeing just to disagree, but about seeking the truth by using one’s own reason. This is why he tightly linked autonomy to moral law: only those who act from inner conviction, rather than external compulsion, can be truly ethical. The foundational values of the European Union-human dignity, freedom, and the rule of law-are all rooted in this

Kantian tradition. The pressing question is whether contemporary technology truly fosters this kind of autonomy or merely simulates it. With the rise of digital technologies, the twenty-first century has inaugurated a new era in which power operates less through repression and more through algorithmic profiling and optimization (Zuboff, 2019).

While Kant viewed the Enlightenment as a liberating process heralding the triumph of reason, Michel Foucault offered a more ambivalent perspective. In 1984, precisely two centuries after Kant's seminal essay, Foucault published his version, bearing the same title but diverging sharply in tone and conclusion. For Foucault, the Enlightenment was not solely the realization of autonomy but also the inception of a new mode of power (Foucault, 1984). What Kant embraced as modernity, Foucault saw as a project of redesigning and governing human beings. Reason, science, and institutionalization, he argued, became not only instruments of liberation but also of discipline. Power, in Foucault's view, is not centralized, owned, or merely repressive; it permeates social structures. It becomes embedded in medicine, psychiatry, education, law, media, and, crucially, digital technologies. This power operates less through command and more through normalization, shaping notions of what is "rational," "acceptable," or "normal," and thus constructs the subject accordingly.

Within such a framework, critique is not a purely intellectual activity but a form of resistance. Foucault argues that true critique involves recognizing and questioning the discursive systems that define what is considered true, good, or legitimate. Hence, the Enlightenment legacy is dual: it fosters critical thinking while simultaneously generating new constraints that frame it. Foucault does not idealize autonomy. He maintains that even "independent" thinking is embedded in power structures: what we think and how we think are influenced by language, institutions, scientific paradigms, and dominant discourses. Autonomy, therefore, is not a final state but a continual struggle.

In modern societies, power no longer asserts itself through coercion but through data, diagnoses, recommendations, and algorithms. This makes it all the more insidious: it appears rational, even benevolent. One of Foucault's sharpest insights is that modern power has become more intelligent, and thus more difficult to resist (Foucault, 1977). He sees the Enlightenment not only as the dawn of critical thought but also as the rise of normative apparatuses. Knowledge, for Foucault, is never neutral; it is inextricably linked with power. Genuine critique, then, is not about verifying facts but uncovering the mechanisms of power behind those facts. In the digital age, this insight is acutely relevant. Platforms, data collection, profiling, and AI-driven personalization infiltrate everyday life while concealing their power. Today, Foucault would likely be more concerned with platform economies and

algorithmic norms than with traditional forms of authority. For Kant, by contrast, the problem is not limited to state power but extends to any heteronomous authority, i.e., any guidance or norm that does not arise from the individual's autonomous use of reason.

### **Virtual Worlds: Autonomy or New Immaturity?**

In the age of the Internet, AI, and the metaverse, humanity appears to face boundless opportunities. Identities, knowledge, communities, and experiences can be chosen freely, anytime, anywhere. In light of Kant's legacy, this could be seen as the culmination of the Enlightenment: individuals at last living, learning, and thinking autonomously. But does this promise hold? Such expectations stem from the widespread belief that digital technologies democratize access to information, amplify individual voices, and reduce dependence on traditional authorities such as the state, the church, or established media. The internet is often imagined as an "equalizer," where knowledge is universally available and where individuals can construct and express their identities without external mediation. In this sense, digital modernity appears to fulfil the Enlightenment ideal of emancipation: it promises direct, unfiltered access to knowledge and a plurality of perspectives that could foster independent judgment. However, whether this potential translates into genuine maturity and autonomy remains a matter of critical debate.

The expectation that the Internet could foster maturity and autonomy has deep intellectual and cultural roots. Historically, every major communication revolution—from the printing press to the spread of mass literacy—has been associated with the promise of greater individual enlightenment and emancipation. In this tradition, the digital revolution appeared as a new stage: a medium that, by lowering barriers of access to information, would empower individuals to think for themselves. The early utopian discourses around cyberspace portrayed it as a radically decentralized and participatory sphere, where hierarchical structures of knowledge and authority would be eroded. The Internet was thus expected not merely to provide new channels of communication but to function as a catalyst of critical autonomy, enabling individuals to bypass established authorities and form judgments based on an unprecedented plurality of perspectives. Whether such expectations have been fulfilled remains an open and contested question.

For Kant, autonomy is the capacity to use reason independently, without relying on others to determine truth or make decisions. Digital technologies appear to support this, yet the emphasis lies on appearance. These technologies are not neutral instruments; algorithms do not merely serve, they pre-select. An AI system structures in advance what we see, read, and are recommended. Social platforms monetize our attention and steer it according

to business imperatives. From a Kantian standpoint, this signals a new immaturity, not due to ignorance, but because decisions are no longer reasoned by the self. If individuals do not understand how the systems they navigate function, they do not act autonomously: they simulate autonomy. This is high-tech immaturity: we feel free while selecting from pre-curated possibilities (Floridi, 2021). In today's context, Kant's question might be: In a digital world, do we think for ourselves, or are our thoughts preprogrammed?

Foucault's conception of power as structuring rather than commanding aptly describes digital systems. These platforms do not prohibit; they prioritize. They steer not through force but through prediction, attention, and customization. Users receive not what they desire, but what they are expected to desire. This is the logic of predictive algorithms: they model and shape behaviour without conscious awareness. It aligns seamlessly with Foucault's theory of discursive power. The "reality" encountered online is not self-evident but constructed. The criteria for "valuable" or "intelligent" content are shaped by algorithmic logic. This leads to a regime of "invisible regulation," where the freedom to choose is formal rather than substantive: options are pre-filtered. Foucault's critical question here is not simply whether information is true, but why certain information is highlighted while others are suppressed. This is the power dynamic of virtual worlds: the unseen curation of decisions.

Digital modernity, particularly the proliferation of data-driven systems and algorithmic decision-making, grants new relevance to Foucault's theoretical framework. Today, behavioural norms are shaped not by the panopticon but by the data panopticon and platform architectures. Algorithms do not merely observe; they pre-emptively model the subject's behaviour, generating recommendations, opportunities, and even sanctions accordingly (Zuboff, 2019). Normalization thus operates not only on physical and social levels, but also at cognitive and perceptual levels: we articulate what the algorithm privileges, perceive what the feed displays, and respond in ways deemed "optimal" by the logic of user interaction. It is precisely in this context that Foucault's critique becomes pertinent: to identify and map the discursive and technological systems that, inconspicuously yet effectively, redefine the subject's scope of action.

A disquieting question emerges from the perspectives of both philosophers. In a system where human behaviour is incessantly monitored, profiled, and shaped, is there still room for genuine autonomy or resistance? For Kant, the autonomous individual poses questions; for Foucault, the resistant individual challenges the system's structural boundaries. Today, both modes of agency are under threat, not due to overt oppression, but because the system's design itself deflects attention from questioning. Information overload, perpetual emotional stimulation, and the polarized logic of platforms all contribute to the erosion of reflective thought. The autonomous thinker is

replaced by a reactive, impulsive user shaped by algorithmic profiling. The “critical citizen” gives way to the “responsive datapoint” as the new normative subject. Virtual worlds thus present not only opportunities but also profound risks. In the words of Kant and Foucault, we must once again ask whether the freedom we experience is genuine or merely an illusion produced by the internal logic of the system. This ambivalence between digital emancipation and new forms of dependency becomes particularly visible in Western Europe, where Enlightenment ideals have been translated into legal frameworks.

### **Western Europe: The “Kantian” Showcase and the “Foucauldian” Reality**

Western Europe’s official self-conception positions it as the intellectual heir of the Enlightenment. The rule of law, critical public discourse, civic autonomy, and the protection of civil liberties are deeply rooted in the political culture of Western democracies. With the advent of digital technologies, this intellectual heritage encountered a new domain: the pressing question today is whether the tradition of autonomy and critique can remain viable amid the rise of AI and algorithmic governance.

Formally, the necessary frameworks are in place. The European Union’s regulatory architecture has become the institutional translation of Kant’s moral philosophy. The EU’s stringent data protection regulation (GDPR – General Data Protection Regulation, adopted in 2016) and the comprehensive framework of the DSA – Digital Services Act (entered into force in 2022) are not merely technical instruments but legal embodiments of the Enlightenment idea that the individual must never be treated merely as a means, but always as an end in themselves. Both frameworks seek to secure informational self-determination, the digital analogue of Kantian autonomy. GDPR defines the individual as the rightful owner of personal data, whose consent is the moral and legal precondition of any processing. The DSA, by contrast, extends this principle from privacy to the architecture of public discourse itself, demanding transparency, accountability, and human oversight in algorithmic systems. In this sense, Europe attempts to legislate autonomy - to transform a moral ideal into an enforceable right.

Yet this raises a paradox: can autonomy be legislated? Can freedom be mandated? In reality, the state cannot legislate autonomy itself, but it can enforce the conditions of possibility for becoming mature, through education, transparency, and rights protections. For Kant, autonomy is fundamentally internal: it arises from the exercise of reason, not from external imposition. If autonomy is externally enforced, it risks turning into well-structured compliance rather than genuine self-legislation.

Foucault, by contrast, warned that modern power is not what it appears to be, but rather what appears benign. The digital environment in Western

societies exemplifies this: users feel free, yet every action is monitored, assessed, and subtly guided by algorithmic systems. Here, power does not prohibit, it personalizes. It does not command, it recommends. Social media platforms, search engines, and AI-based decision-support systems are infrastructures that shape cognition itself. What one sees-or does not see-what one reads and in what sequence-these are not incidental, but questions of structural power. The public sphere is no longer a “free marketplace” but a regulated and dynamically modulated environment. In Foucauldian terms, this is discursive control: the subjects, frames, and vocabulary of thought are pre-structured. Individuals may believe they think freely, but this “freedom” is already conditioned. This is power at its most refined: there is no need for coercion, only optimization.

Western democracies frequently emphasize the importance of critical thinking, yet offer limited systemic support for its cultivation. Educational systems often fail to foster this capacity; the media landscape is polarized; the credibility of scientific institutions is waning; and social platforms prioritize reaction over reflection. While the Western individual perceives themselves as autonomous, they are increasingly embedded in an invisible system that predefines their “free” choices. For Kant, freedom is grounded in critical reasoning. For Foucault, the most insidious form of power is that which structures even this freedom. Thus, Western digital culture embodies a paradox: it maintains the semblance of liberty while progressively shaping experience itself. This is not the totalitarianism of the twentieth century, but the optimized subtlety of the twenty-first. The question is no longer whether resistance is possible, but whether we can still recognize what must be resisted.

### **Eastern Europe: Fragmented Autonomy and the Absence of Trust**

The historical legacy of the Enlightenment is far from homogeneous within Europe itself. The dominant Western European interpretations (the enlightened ideals of individual freedom, direct democracy, and the rule of law) took root very differently in Eastern Europe, where modernization was often not organic but imported, directed from above by the state. Thus, the idea of Enlightenment is not a universal template, but a geopolitical construction, whose meaning and adoption have been shaped by distinct historical experiences and institutional reflexes (Giddens, 1990). While Western Europe institutionalized the values of the Enlightenment-embedding them in law, education, and legal norms-Eastern Europe followed a different path for historical and political reasons. Here, the idea of Enlightenment often failed to become a stable, reflexive value system at the heart of public life. Instead, it remained a theoretical ideal, while daily practice was governed by distrust of authority, self-censorship, or open scepticism.

In Kant's vision, the autonomous person thinks, decides, and judges independently. Yet this presupposes a social milieu that fosters such autonomy: educational systems, democratic culture, and transparent institutions. In Eastern Europe, these conditions are often lacking or weakened. Education frequently fails to cultivate critical thinking, emphasizing conformity and memorization instead. In public life, rather than reflexive debate, political polarization and distrust tend to prevail. For Kant, this constitutes the maintenance of "immaturity." Yet today, it is not the authorities of the past but the confusion of the present that sustains it. The digital realm, which at first glance seems to promise freedom, is for many a route of escape: at last, one can have their own identity, opinions, and thoughts "freely." But in reality, this rarely has a solid intellectual foundation; more often, it is instinctive, reactive, and uncontrolled. For Kant, this is not autonomy, but a new, fragmented form of immaturity.

Western algorithmic control is soft and structured; in Eastern Europe, power is more direct and fragmented. Instead of discursive power, repressive power often prevails: surveillance, censorship, propaganda, and political manipulation. Distrust of institutions is widespread; the "official truth" is suspect. Thus, critical thinking is not a stable institution, but rather a sporadic form of resistance. For Foucault, this would not be an autonomous position, but an uncertain, often self-destructive counterculture. The digital realm becomes the battleground for this struggle: not because everything is free, but precisely because rules have yet to be established. In this context, the virtual world reveals two faces. On one hand, it is liberating: anyone can voice an opinion, critical perspectives and alternative narratives can emerge. On the other hand, it is chaotic: boundaries blur between true and false, fact and fiction, expertise and conspiracy theory. For Foucault, this is not genuine critique, but the disintegration of discourse, where not the pluralism of truth prevails, but fragmentation, in which "everything is equally valid," and thus nothing matters at all.

In many places in Eastern Europe, there is no strong, democratic oversight over digital platforms. State regulation is either absent or politically motivated. As a result, platforms operate without transparency or social reflection. Western-style regulation (e.g., GDPR, AI ethics codes) is often merely copied in form, but hollow in substance. In Foucault's terms, what operates here is not soft power, but both invisible and raw power at once. The digital realm can serve as a site of resistance, but just as easily as a terrain of manipulation, disinformation, and polarization. The system is not normative but chaotic, and therefore unstable. Eastern Europe has often failed to deeply embed the ideals of the Enlightenment into its institutions and, consequently, has not developed a stable critical culture in the digital space either. Freedom is often more informal than it is grounded in law or society. For Kant, this does

not constitute genuine autonomy; for Foucault, it is not structured resistance, but a fragmented struggle for discourse.

### The Matrix of Europe: The Divergence of Ideals and Reality

The previous chapters have shown that Kant’s vision of autonomy and Foucault’s critical stance toward power offer two fundamentally different yet complementary perspectives for interpreting modern Europe. We can now project this duality onto the continent’s two major regions: Western and Eastern Europe. This conceptual model can be illustrated as a four-cell matrix, with Kant and Foucault on the horizontal axis, and West and East on the vertical (see Figure 1). The matrix reveals that European reality does not faithfully reflect its professed ideals; rather, the regions are in a kind of displacement, not only from one another but from their own theoretical foundations.

**Figure 1:** The Kant–Foucault and East–West Matrix

	<b>Kant (Autonomy)</b>	<b>Foucault (Critique of Power)</b>
<b>Western Europe</b>	Institutionalized autonomy; rule of law and data protection rhetoric; apparent critical culture	Discursive control; algorithmic regulation; optimized behaviour; voluntary compliance
<b>Eastern Europe</b>	Autonomy as a scarcity; deficits in education and trust; “immaturity” in modern dress	Raw power; polarized discourse; unregulated digital space; disinformation and paranoia

Notes: The author’s own elaboration

From a Foucauldian perspective, this displacement produces a striking similarity: both East and West are equally structured by diffuse networks of discursive power, which normalize and guide conduct regardless of institutional differences. From a Kantian perspective, however, the distinction is more pronounced. Western Europe has historically built stronger institutions—such as education, rule of law, and civic trust—that provide the conditions of possibility for autonomy (Giddens, 1990; Krastev & Holmes, 2019). These institutional safeguards do not guarantee maturity, but they enable it to emerge. The growing prevalence of algorithmic governance, however, threatens to erode precisely these safeguards. In this sense, the algorithmic structuring of society risks narrowing the difference between East and West, demanding closer attention to how autonomy is sustained in both contexts (Zuboff, 2019; Yeung, 2017).

In Western rhetoric, Kant remains the guiding thread: freedom, self-determination, and critical thinking. Western societies strive to create digital ethical frameworks that align with Enlightenment ideals: autonomy, transparency, and data rights. Yet even these institutions often falter under technological pressure, especially when facing global platform monopolies (Big Tech) (Floridi, 2021). Reality increasingly follows Foucault’s logic:

algorithmic control, behavioural optimization, discourse structured by platforms. Decision-making appears personal, but is filtered. The culture of debate formally exists, but public spaces (such as social platforms) operate according to algorithmic business models. This means that while the citizen feels they are thinking, they are in fact following a form of optimized behaviour. It is the formalization of the Kantian ideal and the fulfilment of Foucauldian reality. The contradiction between the rhetoric of autonomy and the hidden control of discursive structures is one of the deepest dilemmas of Western societies.

Eastern Europe, by contrast, struggles not with overregulation but with a lack of stable and transparent regulation. Here, the digital sphere is “free,” but control is unstructured, haphazard, or outright authoritarian. Distrust toward the state, knowledge, and even critique itself is profound. Foucault would not see hidden power here but a collapsed discourse. Critique is not the rethinking of norms but often a disoriented reaction, or even a conspiracy-driven alternative reality. From the Kantian side, this is the absence of autonomy: people do not use their own reason but follow the narratives of others, often driven by instinct or fear. Thus, the Enlightenment has not been fulfilled but has stalled-temporarily or perhaps for the long term.

The distortion of the matrix shows that Europe as a whole has shifted away from its own ideals. The West, including the US, while claiming to be Kantian, is becoming increasingly Foucauldian. The East, while demanding freedom, often struggles amid unstructured, unreliable, or manipulated systems. In both regions, there is a simulation of autonomy: we act as if we are critical, yet we do not always understand or control what structures our thinking.

### **Toward a Digital East? – The Challenge to Europe’s Self-Image**

The Enlightenment project was originally born in Western Europe and radiated outward-more or less successfully-to the rest of the continent. Concepts such as autonomy, critical reason, freedom, secularization, and human dignity were all part of this intellectual heritage. The European Union built its institutions and political identity upon these foundations. As we have seen, however, these ideals have often become hollow, purely formal, or even distorted in practice. Increasingly, an uncomfortable question arises: Is it possible that, while Western Europe is the nominal heir to the Enlightenment, it is politically and technologically drifting toward a more “Eastern” type of society?

What does it mean to move “toward the East”? This is not a matter of geography. The “East” here is not merely the post-Soviet space or the EU’s periphery. Rather, the “East” functions as a metaphor: a society of mistrust, institutional weakness, loyalty over autonomy, covert or overt technological

control, and the fragmentation of discourse with a marginalization of reflection. When we ask “Toward the East?”, we are asking whether the Enlightenment project is reversing, and if so, what might take its place. Today, the “East” not only evokes the past, but also signals a possible face of the digital future. These are societies where technology invisibly governs life, individual choices unfold along pre-programmed patterns, truth becomes relative, and popularity-not substance-determines what matters; where power operates not through force but through algorithmic optimization; and critique is less institutionalized than impulsive, often extreme. In this sense, the East is not Eastern Europe, but a new civilizational condition, in which freedom is appearance, reflection is marginalized, and power diffuses across language, technology, and behavioural norms.

Kant might ask: “Where is the autonomous person, if they are unaware that the algorithm is deciding for them?” Foucault would add: “Power today does not repress, but pacifies-and thus silences.” This makes the question urgent: Will there be a new Enlightenment for the twenty-first century, capable of redefining autonomy, critique, and freedom within the frameworks of digital reality? Or, will Europe wander into a future where no one even remembers what “*Sapere aude*” meant? I believe that Europe cannot return to Kant’s eighteenth-century world, but even less can it afford to drift uncritically into a technologically dominated society. Autonomy today does not mean rejecting authority, but understanding the system itself. Critique is not destruction, but the capacity for conscious rethinking. The “East” can also serve as a warning: a reminder of what happens when the Enlightenment project is distorted or abandoned. The question is not East or West, but whether Europe can face, in an authentic way, what it has neglected or lost.

### **Conclusion – The New Trial of Enlightenment: Europe at the Threshold of Reflection**

The Enlightenment project is not a thing of the past. It is not a closed philosophical era, nor a set of doctrines confined to books, but a mode of thinking that must either remain alive or gradually fade away. Europe’s future depends on whether this practice can survive in new forms amid the technological, social, and political challenges of the twenty-first century. The analysis along the Kant–Foucault axis has shown that both autonomy (as an ideal) and critique of power (as a necessity) are endangered, albeit in different ways, in the West and the East.

The digital space, initially appearing to extend freedom, has often become a site of control and simulated choice. Algorithms do not merely serve, they shape-invisibly, yet effectively. Meanwhile, the West maintains Kantian rhetoric, but operates according to Foucauldian reality. The East struggles with the absence of reflection, while its informal freedoms are

distorted by unstructured, often toxic digital cultures. The entire continent is heading toward a new kind of immaturity: it is not forbidden thought, but optimized behaviour that determines how we live—a condition that mirrors what Morozov (2021) calls “freedom as a service,” the transformation of autonomy into algorithmically mediated dependence. The real question, then, is not whether a return to the Enlightenment is possible, but whether we are capable of reimagining its spirit. Can Kant’s autonomy function in an era when people do not understand the systems in which they live? This question echoes Arendt’s concern in *The Human Condition* (1958/1998): modern individuals inhabit systems of their own making that they no longer fully understand. The erosion of comprehension thus raises the problem of whether autonomy, as Kant conceived it, can still be sustained. Is there a place for Foucault’s critique in a society where power is no longer “top-down,” but operates through databases, profiling, and user behaviour patterns?

I believe the answer starts here: only if critical thinking ceases to be just curriculum, and becomes public, political, and technological reflection. It is not enough to teach Kant or read Foucault; we must live the mode of thinking they represent. Europe would still become the continent of the Enlightenment again, but not on the geological map of the eighteenth century; instead, it will happen across digital networks, in the moral decisions of AI development, the structures of the data economy, and in the questions of who determines what counts as “knowledge,” and why.

In summary, the findings suggest that Europe’s autonomy in the digital age is increasingly simulated rather than substantial: freedom is formally protected but substantively guided by algorithmic systems. The East–West divide is no longer geographical but structural—both regions experience a convergence toward optimized behaviour and diminished critical reflection. The study therefore proposes that a renewed Enlightenment must emerge, one that unites philosophical critique with digital literacy, ensuring that individuals understand, rather than merely inhabit, the technological systems shaping their lives (Helbing, 2019). The real question, therefore, is not whether “Europe is moving East,” but whether it recognizes that it has strayed from its own path. If so, there is still time to correct the course. If not, Europe may become little more than a fond memory of its own ideals, while new, invisible powers shape the future.

### **Appendix – The Empirical Context of Digital Autonomy: Structural Tensions and Regional Divergence in Europe**

While this study is primarily theoretical, juxtaposing Kant’s concept of autonomy with Foucault’s theory of discursive power, the broader philosophical claims demand empirical contextualization. This appendix provides such a context, drawing upon two contemporary and authoritative

sources: the *Freedom on the Net 2024* report and the *Digital Economy and Society Index (DESI) 2022*. The objective is not to conduct a statistical or causal analysis, nor to treat these datasets as direct evidence for interpreting Enlightenment philosophy. Rather, the aim is to sketch the broader socio-technological contours within which the theoretical argument unfolds.

These reports reveal patterns that resonate-though not deterministically-with the core concepts of this study: autonomy, algorithmic power, and digital maturity. The data function as snapshots of a deeper historical process of transformation, in which technologies such as generative AI serve more as accelerators than root causes. Autonomy in the digital age is not shaped by technology alone but by the institutional, educational, and normative ecosystems in which these technologies operate. Thus, the appendix serves as an empirical supplement: not to illustrate, but to situate and enrich the theoretical framework.

### **Global Erosion of Trust and Freedom**

The *Freedom on the Net 2024* report documents a sobering global trend: internet freedom has declined for the 14th consecutive year. In 27 of the 72 countries surveyed, the conditions for online human rights have deteriorated. One of the most striking developments is the state-sponsored manipulation of online content, particularly during electoral periods, which undermines the reliability of information ecosystems and fosters a climate of mistrust. Such practices illustrate the Foucauldian insight that power now functions less through censorship than through modulation, steering perception rather than outright blocking it.

Meanwhile, *DESI 2022* data show that while 87% of EU citizens use the internet regularly, only 54% possess at least basic digital skills. This discrepancy between access and capability exacerbates the vulnerability of users to manipulation, intensifying the trust deficit that characterizes the digital age. The illusion of digital autonomy often masks a deeper dependency, where users are formally connected yet epistemically fragile.

### **East–West Contrasts and Structural Asymmetries**

Europe is far from homogeneous. According to *Freedom on the Net 2024*, countries like Iceland and the Netherlands are classified as “Free,” whereas Russia and Belarus rank among the most repressive. Hungary is labeled “Partly Free,” highlighting intra-EU divergences in digital freedom and civil liberties. The *DESI 2022* further reveals striking differences: in countries like Finland and the Netherlands, nearly 80% of the population has basic digital skills; in Romania and Bulgaria, this figure drops to around 30–40%.

These contrasts are not merely geographical but structural. “East” and “West” here refer to institutional robustness, civic culture, and regulatory efficacy. In Eastern Europe, rural–urban gaps and weak educational infrastructures deepen asymmetries in digital inclusion and literacy. These factors not only shape access to technology but also determine the forms and limits of digital autonomy. As this paper has argued, Kantian maturity requires both personal capacity and supportive institutions. In many parts of Eastern Europe, both are lacking.

### **Technological Innovation and Its Discontents**

Generative AI, deepfake technologies, and algorithmic avatars have entered not only cultural but political arenas. The *Freedom on the Net 2024* reports instances of AI-generated content influencing electoral outcomes and public opinion, raising questions about the integrity of democratic processes. At the same time, *DESI 2022* notes that only 8% of European businesses had implemented AI solutions by 2021. This disconnect between the perceived political power of AI and its limited institutional adoption illustrates a critical paradox: the anxiety about technological manipulation outpaces the reality of its widespread application. Thus, technology becomes a projection surface for deeper societal anxieties about control, visibility, and agency.

### **Institutional Responses and the Role of Civil Society**

Encouragingly, institutional countermeasures are emerging. The EU’s *Digital Decade 2030* agenda sets concrete goals: ensuring that 80% of citizens have basic digital skills, expanding ICT employment, and pushing for AI adoption across businesses. Civil society initiatives-like Taiwan’s Cofacts platform or the European Digital Media Observatory (EDMO)-illustrate the bottom-up efforts to combat disinformation and build civic resilience. Regulatory instruments such as the *Digital Services Act* and the revised *Code of Practice on Disinformation* aim to make digital environments more transparent and accountable. These strategies reflect an understanding that digital governance cannot be purely technological; it must also be normative, participatory, and reflexive.

### **Concluding Reflection**

The data confirm the central thesis of this study: that digital autonomy is increasingly simulated rather than substantial. Europe is caught between the rhetoric of Enlightenment and the reality of algorithmic governance. The *Freedom on the Net* and *DESI* reports together show that:

- The crisis of trust is not episodic but structurally embedded;
- The East–West divide reflects not nature but institutional asymmetries and historical legacies;

- AI technologies are already politically potent, even where they are not yet economically widespread;
- The governance of digital spaces demands both top-down regulation and bottom-up civic engagement.

Thus, autonomy in the digital age is not a given, but a contested and contingent achievement. As this appendix emphasizes, philosophical reflection must be grounded in empirical awareness. If we are to preserve and reinvent the Enlightenment in our time, we must engage not only with abstract principles but with the material, political, and technological conditions that shape them.

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## Artificial Intelligence and Its Impact on Copyright: A Legal Perspective

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### Abstract

The aim of this research paper is to provide an overview of the current impact of Artificial Intelligence (AI) on copyright, focusing exclusively on AI-generated works that may be eligible for copyright protection. A central dilemma arises concerning the certainty of copyright—specifically, who owns the copyright in works produced through the use of AI systems. Copyright is a legal concept describing the rights granted to creators of literary and artistic works, including reproduction, copying, performance, and public display.

The growing role of technology in creative processes has significantly expanded and, in some instances, replaced aspects of human involvement. New creative works generated through software programs built on algorithms and databases can no longer be easily distinguished from those produced by human creators. This situation has created substantial uncertainty in both business and legal spheres.

The scope of this article includes (a) an analysis of how key international legal systems address AI-generated creations and their implications for copyright; (b) the identification of possible solutions that governments may adopt to promote legislative uniformity; and (c) an evaluation of how such uniformity could strengthen legal certainty and support ethics and the public interest.

This study follows an explorative, descriptive, qualitative methodology to examine how different countries have approached AI-related legislation, including regulations and enacted laws. The research emphasizes the principles of legal certainty, ethics, and the protection of the public interest.

Findings indicate that countries across different regions are at varying stages in their approach to AI. In the United States, AI-generated works created without human input are not copyrightable. In contrast, Chinese courts have ruled that human intellectual involvement coupled with originality may justify copyright protection for AI-generated works. The United Kingdom (UK) has adopted a more flexible approach, granting copyright to the individual who makes the necessary arrangements for the creation of a work. Overall, North American and European countries have taken the lead. There is a pronounced focus on ethics and the protection of public interest, as reflected in the *Global State of Responsible AI Report (2024)*.

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**Keywords:** Artificial Intelligence, Copyright, Regulations, Legal Certainty, Public Interest

## Introduction

It is now widely accepted that AI strongly influences the way businesses and individuals operate, producing significant and complex effects on copyright. The key aspiration of businesses is to remain innovative and competitive. According to Aghion et al. (2019), companies are achieving greater profitability and improved performance by integrating AI into their work processes. Even within the security sector, advances in machine learning and AI have marked a turning point in the automation of warfare (Allen & Chan, 2017). Therefore, it is crucial to examine the impact of AI on copyright. AI tools play a decisive role in determining who the rightful owner or holder of copyright is. Haugeland (2019) argues that human thinking and machine computation are “radically the same.” Dr. Shlomit Yanisky-Ravid (2018) of Yale Law School supports the theory that AI systems possess certain cognitive abilities that enable them to independently create inventions and other creative works which, if produced by humans, would qualify for copyright protection under existing legal standards.

Determining how copyright ownership, protection, and enforcement apply to works produced with AI remains one of the most challenging issues for ensuring legal certainty while safeguarding ethics and the public interest. Most countries—including those in the developed world—continue to debate how to confront the challenges posed by AI, and the legal context in developing nations is even less defined. Once a legislative direction is established, countries must craft solid, clear, and consistent laws that uphold legal certainty, emphasize ethics, and protect the public interest.

It is fair to say that the use of AI has profoundly transformed traditional paradigms. Several key challenges must be considered when drawing conclusions for this research:

- a) **Ambiguity in legislation.** Current laws often fail to address AI-generated works explicitly, making it difficult to reach definitive conclusions. There is no uniform position regarding who should be credited with the copyright in an AI-generated work, though human involvement and originality are generally considered essential.
- b) **Global disparities.** Jurisdictions continue to adopt divergent approaches to AI and copyright, complicating efforts to amend existing laws. Outcomes depend largely on each jurisdiction's interpretation of originality and the role of human contribution in AI-generated creations
- c) **Rapid evolution of AI.** The pace of AI development exerts additional pressure on lawmakers, resulting in difficulties adapting legislation and delays in regulatory updates.

The key objectives of this paper are to (a) understand and assess AI's impact on copyright, (b) explore the efforts of various countries-both developed and emerging-to establish legislation on the ownership and protection of AI-generated works, and (c) evaluate whether and how such works may be incorporated into existing copyright frameworks.

Accordingly, this study examines the following issues: (a) Who owns the copyright in outputs produced by AI? (b) Should such copyright be assigned to the programmers or developers of the AI, to the users who direct it, to the AI itself, or to another party? (c) How do the concepts of human involvement and originality apply to AI-generated works? and (d) What legal-certainty, ethical, and public-interest considerations arise when granting copyright to AI-generated content?

Chekuri (2024) defines AI as the field of science and engineering concerned with developing intelligent machines and computer programs. AI focuses on transferring anthropomorphic intelligence and reasoning to machines that can assist humans in various ways (Sivasubramanian, 2021).

According to Joe (2021), a computer exhibits AI when it performs tasks that would normally require human activity. AI may also change the ways in which new ideas and technologies emerge, helping to solve complex problems.

AI has undoubtedly contributed to economic growth (Aghion et al., 2019) and has driven innovation in products and services (Cockburn et al., 2019). For example, in manufacturing and production industries, AI-enabled robotics enhances processes and introduces new challenges for the global economy.

Field (2006) defines copyright as the set of intellectual creations of human beings. Spence (2007) describes copyright as an intangible asset

attributed to an individual creator or identifiable group of creators presumptively entitled to that right.

Hristov (2017) observes that, with the intensified use of AI, an increasing number of works are produced without direct human authorship. Algorithms and learning machines-core components of AI-have become modern sources of creativity.

In certain instances, intellectual-property authorities have denied copyright protection to non-human creative works, releasing them into the public domain for unrestricted access. Other regulatory bodies argue that granting copyright to programmers or developers is crucial for the continued progress of the AI industry. Conversely, some scholars maintain that human involvement in directing or training AI systems satisfies the “human authorship” requirement, while others contend that purely AI-generated works should not be protected. Regulators must provide legal certainty, ensuring that ethical principles and the public interest are safeguarded while minimizing business and legal risks.

It is essential to shape the future of copyright law in the AI era by closing gaps in current legal frameworks, encouraging innovation, protecting creators’ rights, and promoting legal certainty, ethics, and the public interest.

## **Methodology**

The research approach is based on an exploratory, descriptive, and qualitative methodology aimed at determining how different countries have approached the intersection of AI and copyright. This study focuses primarily on doctrinal and comparative legal analysis, supported by limited empirical data collection to illustrate specific legal trends and practices

- A. Doctrinal Analysis: This part of the research begins by analysing existing copyright laws in relation to AI-generated content. It includes an extensive review of current international copyright regulations, domestic legal frameworks, and relevant case law to identify how the concept of authorship and originality is interpreted across jurisdictions.
- B. Comparative Analysis: The study compares how different jurisdictions address the intersection of AI and copyright. Key jurisdictions considered include the United States, China, the European Union, the United Kingdom (UK), India, and emerging markets such as Argentina. The comparative perspective seeks to identify both convergences and divergences in national approaches and to evaluate the extent to which each legal system accommodates AI-generated works within its copyright framework.
- C. Case Law: This section analyses selected judicial decisions involving AI-generated works to understand how courts in different jurisdictions are currently addressing these issues. Special attention is given to the

interpretation of human authorship, originality, and ownership in cases where AI systems play a substantive creative role.

## **Results**

Among its many applications, it is important to emphasize AI's growing capacity to create artistic, literary, and other types of intellectual works. Such creations may establish limits to human creativity. AI uses technology to automate tasks that would normally require human intelligence (Surden, 2019).

To determine who owns the copyright in a work generated by AI, countries will need to clearly define their legal approach to AI-generated works and, if necessary, review existing legislation or enact new laws.

The fundamental question this research seeks to answer is: Who holds the copyright over an AI-generated creation? Possible answers include: a) the AI programmer; b) the AI developer, c) the individual who uses the tool to generate the work (the user), or d) the resulting work being considered part of the public domain (without specific authorship)

Copyright refers to creations of the mind-such as inventions, literary, and artistic works-according to the World Intellectual Property Organization (WIPO). However, advances in AI technology now enable the creation of content that rivals human creativity across various disciplines. This development raises complex discussions within copyright law, particularly regarding the legal status of AI-generated works. Traditional copyright systems have been built around human creativity, creating uncertainty about how to treat AI-generated content from a strictly legal standpoint.

Generative AI can produce copyrightable material that appears to originate from a human author. The extent to which AI-generated works meet this requirement remains the subject of ongoing debate. WIPO has emphasized the need for international consensus and is actively consulting with member states to establish uniform criteria. The current situation of generative AI and copyright in key jurisdictions is as follows:

### **United States (US)**

The 1787 US Constitution and, subsequently, the Copyright Act of 1976 established the framework for copyright. Works protected by copyright must comply with two requirements: (a) the author must be a human being, and (b) the work must be original. What does originality mean in terms of copyright? It refers to a work created by a human being that is not copied and demonstrates at least minimal creativity. Nonetheless, US courts have ruled that works generated by AI without human creativity are not copyrightable. Similarly, the US Copyright Office (USCO) has denied copyright protection to works without human intervention in various cases. Prompts given to

generative AI software resulting in complex outputs are not sufficient for copyright protection under current US legislation. In 2023, the USCO denied registration for “*Théâtre D’opéra Spatial*”, an image generated using the AI tool Midjourney. USCO determined that AI-generated elements dominated the work and that human contribution had been minimal, making it ineligible for copyright protection. Earlier, it had rejected a copyright claim for a work created independently by AI without meaningful human input (“*A Recent Entrance to Paradise*”), a decision later confirmed by a US District Court in *Thaler v. Perlmutter* (2023). In addition, US case law provides a minimal standard of originality required for copyright protection (Samuelson, 2017).

## China

China has shown a somewhat more flexible approach toward protecting AI-generated content. On November 27, 2023, the Beijing Internet Court (BIC) ruled in an infringement lawsuit (*Li vs. Liu*) that an AI-generated image can be copyrighted and that the human who prompted the AI has the right of authorship under Chinese copyright law. The AI-created image in dispute was considered a “work” under the Chinese Copyright Law.

According to Wang & Zhang (2024), the court considered four elements to determine whether the image qualified as a work under Chinese law: (1) originality; (2) relation to literature, science, or art; (3) a form of expression; and (4) “intellectual achievement.” The court focused particularly on the “originality” and “intellectual achievement” factors.

The concept of “intellectual achievement” refers to the human intellectual activity involved in the work. Through Stable Diffusion, the plaintiff selected more than a hundred prompts, ordered them, and defined specific parameters. He adjusted and modified those prompts and parameters until producing a final image aligned with his own ideas. These steps demonstrated sufficient evidence that the image resulted from the plaintiff’s intellectual effort. The court stated that “intellectual creation” means the work must reflect a human intellectual contribution. The court analyzed the process of image creation, in which the plaintiff made several input choices—such as selecting a particular AI service provider, designing the character and background (e.g., face shape, hair color, direction of gaze, lighting, background), determining the order of inputs, and adjusting various technical parameters to personalize the image. The court considered this selection and input process as the plaintiff’s intellectual contribution.

Furthermore, “originality” was reflected in the plaintiff’s personalized choices and judgment throughout the creative process, including the choice and combination of prompts and the definition of the final output. Consequently, the court awarded authorship to the plaintiff. It also ruled that the AI model could not be an author, as Article 11 of the Chinese Copyright

Law expressly limits authorship to human beings or legal entities. Therefore, in China, there is a tendency to consider AI-generated results copyrightable if a human is sufficiently involved in generating the result through input prompts, selection, and adjustment of parameters. The AI output must reflect the individual's personal contribution, ideas, and preferences.

### **Argentina**

In Latin America, Argentina's Copyright Law No. 11.723 does not contemplate creations generated by AI. Conversely, the law recognizes only works produced by human beings. Article 17 of the Argentine Constitution protects property in all its dimensions, including copyright.

### **European Union (EU)**

Directive (EU) 2019/790, commonly known as the Directive on Copyright in the Digital Single Market (DSM Directive), does not contain specific provisions for AI-generated works. It maintains the requirement of human creativity for copyright protection. A work must be original, reflecting the author's own creativity. The concept of originality, as interpreted by the Court of Justice of the European Union (CJEU), requires that a work involve individual human contributions. AI-generated works therefore, pose a strong challenge to the principle of human authorship, as they can be created independently by machines.

The DSM Directive does not define "authorship" concerning AI-generated content nor introduce specific rules for AI-generated works. According to Iaia (2025), the European legislator is brief in defining whether a work is original if it reflects the author's own intellectual creation. The key issue is whether an AI-generated work can meet the originality requirement without human intervention. The CJEU has ruled in *Infopaq International A/S v. Danske Dagblades Forening* (C-5/08) and *Eva-Maria Painer v. Standard Verlags GmbH* (C-145/10) that copyrighted works must "contain elements which are the expression of the author's intellectual creation," and that such creation "is the author's own if it reflects the author's personality." These criteria cannot be met by mechanical or automated processes such as those generated by AI. Therefore, completely independent AI-generated works do not meet the originality requirement. Notwithstanding the lack of explicit provisions, the DSM Directive includes guidance on AI-assisted works, which may qualify for protection if there is a degree of human intervention. For instance, if a human uses AI to create content while exercising control over the process, the resulting work could be eligible for copyright protection, depending on the extent of human contribution to its originality.

## United Kingdom (UK)

Traditionally, copyright in literary, dramatic, musical, or artistic (LDMA) works in the UK belongs to the human creator. However, the UK is one of the few countries with specific legal rules for works generated by AI systems. The Copyright, Designs and Patents Act (CDPA) expressly contemplates copyright protection for computer-generated works that lack a human creator. Implementation has been problematic because the legislation does not clearly address the fundamental originality requirement. LDMA works must still comply with the originality test, referring to the independent skill and labor used in creation. Under the CDPA, originality requires “human personality,” “free and creative choices,” and an “author’s personal touch,” not merely technical or mechanical production.

Section 9(3) of the CDPA provides that “in the case of a literary, dramatic, musical or artistic work which is computer-generated, the author shall be taken to be the person by whom the arrangements necessary for the creation of the work are undertaken.” Thus, authorship is attributed to the human who made the necessary arrangements. However, there is no specific provision establishing originality where human input is limited.

Guadamuz (2017) argues that Section 9(3) was designed as an exception to the originality requirement for such works. Conversely, Bentley (2014) suggests a different originality test—AI-generated works should be deemed original if they have novelty and are not copied, resulting from the independent acts of the AI system. Copinger & Skone (1958) argue that “the relevant skill and labor is that of the person by whom the arrangements necessary for the creation of the work were undertaken.”

In the *Express Newspapers* case, a direct link was found between the programmer’s work and his instructions to the computer, as he played a key role in designing the logic and rules by which outputs were generated and exercised significant control over the final product. Similarly, in *Nova v. Mazooma Games*, the court ruled that “insofar as the composite frames were computer-generated works, the arrangements necessary for their creation were undertaken by the programmer, as he devised the appearance, rules, and logic by which each frame was generated, and wrote the relevant program.” Accordingly, he was considered the author by virtue of Section 9(3).

Both the 1977 Whitford Report and the 1981 Green Paper on Reform of Copyright Protection in the United Kingdom examined who should be regarded as the author of a computer-generated work: the programmer, the originator of the data, or the person operating the computer. However, the subsequent White Paper concluded that no specific provision should be made, as authorship must be determined case by case.

In cases where authorship is defined as “the person by whom the arrangements necessary for the creation of the work are undertaken,” it is key

to identify the individual who initiated and organized the generation of the work-the person without whom the work would not exist.

## India

One of the most relevant issues in Indian copyright law is the absence of recognition of AI as an author (Mishra, 2025). According to Sanyal (2024), the main question is whether ownership can be extended to a non-human entity-software, algorithms, etc.-that contributed to a creative result. Current Indian intellectual property law does not recognize software or algorithms as authors of intellectual property eligible for statutory protection. The Copyright Act of 1957 and the Copyright (Amendment) Act, 2012 (collectively, ICA) recognize the human who causes a computer-generated work to be created as the author. The non-human counterpart (software or AI system) cannot be assigned authorship under Section 2(d)(vi) of the ICA.

The Parliamentary Standing Committee's Report No. 161 referred to AI as "a discipline of computer science aimed at developing systems and mechanisms that perform tasks requiring human intelligence, including thinking, perceiving, learning, problem-solving, and decision-making" (Sanyal et al, 2024). While the ICA does not explicitly address AI-generated content, Section 2(d)(vi) specifies that for computer-generated works, the person causing the work to be created is considered the author and holds copyright.

In 2021, the Indian Copyright Office handled a case involving an AI system named *RAGHAV* seeking copyright registration for an artwork titled "*Suryast*." Initially, registration was denied for lack of a human author, but protection was later granted when a human was listed as co-author alongside *RAGHAV*.

In *Eastern Book Company v. D. B. Modak* (2008), the Supreme Court emphasized the concept of originality, ruling that copyright requires a degree of creativity and that merely selecting and arranging existing material, such as legal judgments, did not meet the originality threshold. This precedent is relevant to AI-generated works, as AI often creates content by arranging or processing existing data. Without human creative input, such works may fail to meet originality standards in India.

It is essential to note that AI can independently generate innovative and unique outputs by analyzing vast datasets and patterns in existing works. However, when AI systems are regarded as creators of works generated from input data, the originality of such works is often questioned. Another crucial issue is the manner in which data are obtained. Datasets used to train AI systems-generally derivative works-must be obtained lawfully and with the creators' consent.

Securing copyright for derivative works requires a clear and substantial departure from the original source. While AI tools rely on derivative data, the resulting output is not a direct copy but the product of the model's learning capabilities. Therefore, AI-generated outputs should be recognized as distinctive derivative works that reflect the AI's insights rather than mere rearrangements of pre-existing material.

Under current Indian law, applicants for derivative works must reference the original works in their applications, which could serve as a precedent for requiring similar references for training data used by AI systems.

One of the fundamental principles of Indian copyright law is originality. Section 13 of the ICA provides that copyright subsists in original works, interpreted to mean that the work must originate from the author and involve a minimal level of creativity. This interpretation, supported by case law, complicates attribution of authorship to AI-generated works, as machines lack conscious intent and creativity.

Indian courts have not yet ruled on this issue, but it is likely they will follow principles prioritizing human authorship. Alternatively, India could develop a new licensing system for AI-generated works, allowing human creators to retain certain rights while acknowledging the unique nature of machine-generated creativity. Generative AI tools are trained on large datasets-often publicly available and sometimes copyrighted. However, Indian law offers no protection or licensing mechanisms for authors whose works are used without permission. This issue arose in *ANI v. OpenAI* (2024), before the Delhi High Court, where ANI accused OpenAI of using its exclusive news content to train ChatGPT without authorization, in violation of Sections 17 and 53 of the ICA. OpenAI must demonstrate compliance with "fair dealing" obligations for its use of ANI's content.

India currently has no specific laws on fair dealing or transformative use related to AI training. Copyright owners cannot opt out of having their works used for AI training, as allowed under the EU's AI Act (2025). Consequently, Indian creators lack protection against the misuse of their intellectual property.

## **Discussion**

According to the findings presented in Section 3 (Results), there is currently no global uniformity in how copyright for AI-generated works is addressed. Extensive debate has emerged, and only a few countries have so far introduced provisions in their domestic legislation to regulate AI-generated works. This situation may evolve as AI technology continues to expand and mature. The US and EU maintain human authorship as a prerequisite for copyright protection. USCO has consistently rejected copyright claims for AI-generated works, citing the absence of human intervention. Similarly, the

EU's Copyright Directive (2019) upholds the requirement of human creativity, leaving no space for machine authorship.

In contrast, the UK has adopted a more flexible approach, granting copyright to the individual who “makes the arrangements necessary” for the creation of a work by a machine. CDPA includes provisions for *computer-generated works*, defined as works created by a computer in circumstances where no human author is identified. This approach recognizes the contributions of individuals who use AI to generate creative works, even if they do not directly produce the content themselves. The underlying rationale is that copyright law aims to promote creativity and originality-qualities that AI lacks, as it operates through programmed algorithms without human intention or consciousness. India, meanwhile, is under increasing pressure to introduce legal reforms to address the challenges posed by AI-generated works. Its current copyright framework does not adequately cover these complexities. Global trends in developed nations offer valuable insights that India could adopt to regulate AI-generated works.

The Berne Convention for the Protection of Literary and Artistic Works, to which India is a signatory, emphasizes the protection of works authored by humans. The alignment between EU legal principles and India's obligations under the Berne Convention may lead India to adopt a similar position and to resist granting copyright protection to AI-generated works lacking human intervention. Conversely, India could follow the example of the UK by attributing copyright to the person or entity responsible for making the arrangements necessary for the creation of the AI-generated work-such as developers or programmers behind the AI system. This approach would recognize the essential role of human input in the AI creation process without extending copyright to the AI itself.

Future legislative options may involve either attributing copyright to programmers, developers, and users of AI systems or designing a new legal framework for recognizing machine-generated creations. The pace and extent of progress in this area will depend on how governments across different regions perceive the risks and opportunities brought by AI.

As reflected in Stanford University's 2024 data on global AI trends, efforts continue worldwide to strengthen legal certainty while safeguarding ethics and the public interest.

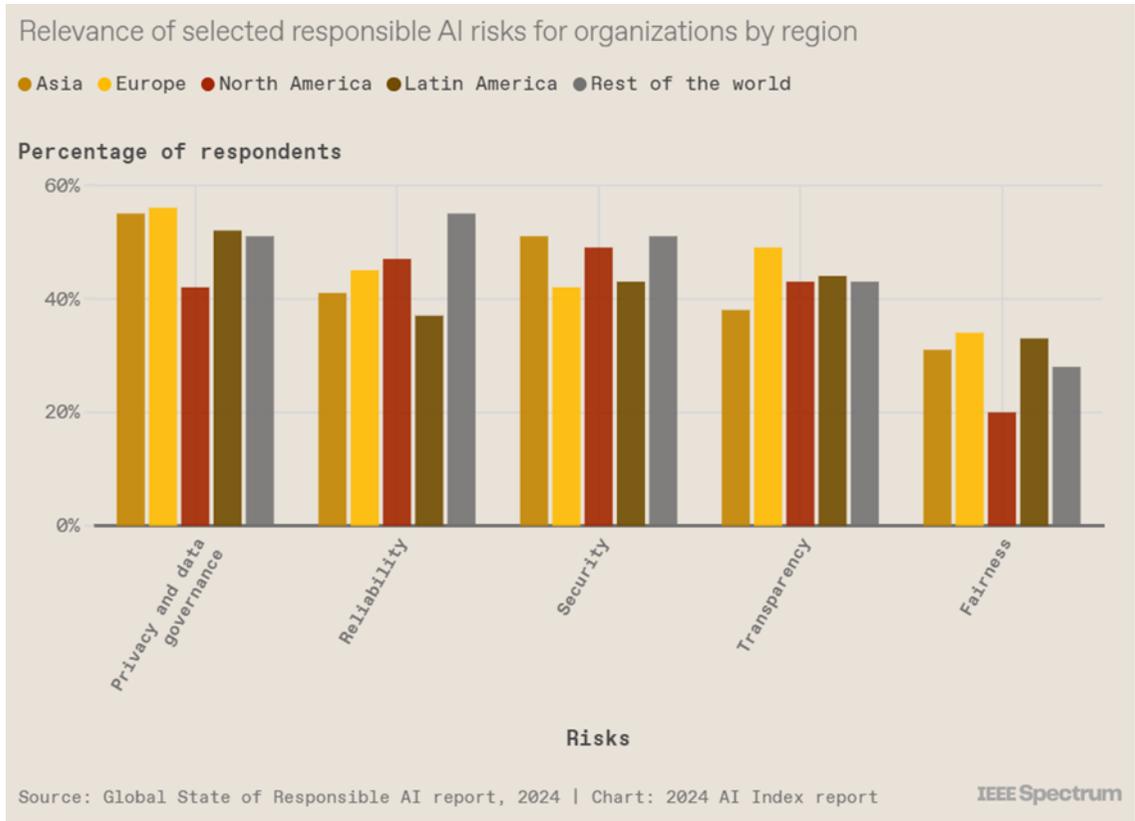


Figure 1

WIPO could develop a regulatory framework to address the copyright status of AI-generated works. Potential solutions include: (1) maintaining the human authorship requirement while recognizing AI as a tool, and (2) granting copyright protection to AI-generated works under specifically agreed conditions. WIPO foresees long-term impacts of AI on copyright. As AI continues to evolve, copyright laws may need to become more flexible to accommodate new creative processes. The increasing adoption of AI in artistic, literary, and musical fields could drive substantial legal reforms in copyright law. There is already a tendency to create a new category generally known as “AI copyright.” However, a broader consensus would be required for this to materialize.

There are both implications and benefits in having adequate and uniform regulations covering copyrightable AI-generated creations, among which the following should be mentioned:

- a) Legal certainty: Clear, transparent, and concise regulations could prevent copyright ownership conflicts among AI programmers, developers, and users.

- b) Legal certainty (bis): Establish specific and clear rules and criteria in domestic legislation for AI-generated creations, including a specific registry under AI authorities where such creations should be registered.
- c) Legal certainty (ter): Summon experts in technology, law, ethics, and AI to design criteria for approving AI-generated works, reducing risks, and emphasizing ethics, human rights, governance, and the sustainable development goals defined by the United Nations.
- d) Incentive for innovation: More investment in AI technologies under uniform regulations would encourage the development of new innovative products.
- e) Increase in competitiveness: Enterprises developing new AI technologies would generate new creations, increasing their product portfolios.
- f) Ethics and public interest: Uniform criteria for AI-generated works would contribute to creating a stronger ethical and public-interest context.
- g) Increase in trade: Uniform standards for AI-generated works would promote an increase in global trade among nations.
- h) Public domain: AI-generated works that do not qualify as copyrightable could enter the public domain, benefiting public interest through free access and use.
- i) Uniformity: WIPO's role is vital in reaching basic uniform rules for countries to set standards on how to apply copyrightability criteria to AI-generated creations.
- j) Common strategies and priorities for global policies: A considerable number of countries began in 2024 to analyze AI policies with the purpose of assessing the ethics of national priorities, which may sooner or later impact the copyrightability of AI-generated creations.
- k) AI plans to measure ethics: AI policies are increasingly being studied by researchers to assess the ethical aspects of national priorities and policies.
- l) Innovation competitiveness vs. ethics/integrity: Although countries compete for AI innovation, priorities are also focused on ethics and integrity, and a balance should be achieved.
- m) Public interest: National priorities in AI are closely related to public-interest standards, reflecting societal and national values in infrastructure plans.
- n) AI plans: Countries position themselves within the complex AI landscape of key issues, priorities, and values.
- o) Culture and education: All member states of the United Nations Educational, Scientific and Cultural Organization (UNESCO) adopted, on November 25, 2021, a historic agreement that defined

common values and principles required to ensure the healthy development of AI. Such an approach will contribute to improving education and cultural values.

- p) Sustainability: AI also supports the decision-making processes of governments and the private sector, helping to combat global problems such as climate change and threats to world order, according to UNESCO.
- q) Challenges: UNESCO has identified a number of challenges to be addressed, such as ethnic bias, significant threats to privacy and dignity, dangers of mass surveillance, and the increased use of unreliable AI technologies in law enforcement. UNESCO claims that the world needs rules for AI to benefit humanity, and its 193 member states are required to report regularly on progress and practices for building the necessary legal infrastructure to ensure the ethical development of AI technology.
- r) Protection of data: UNESCO provides guidance to ensure that digital transformations contribute to achieving sustainable development goals, addressing issues of transparency, accountability, and privacy, with action-oriented policy chapters on data governance, personal data protection, education, culture, labor, healthcare, and the economy. Fighting against increasing inequalities, climate change, and environmental crises is also critical.
- s) Bans: Prohibitions on the use of AI systems for social scoring and mass surveillance will help emphasize the need for non-disruptive social contexts.

## Conclusion

The copyright status of AI-generated content remains a major legal matter open to continuous debate in international law and global markets. There is no doubt that AI is making certain human functions obsolete (Rademacher, 2020). While national approaches vary, there is still no uniform international consensus on whether AI-generated works can be copyright-protected and, if so, who should be legally recognized as the owner. WIPO and other international organizations are expected to establish agreed rules so that countries' legal frameworks can successfully address existing and emerging AI challenges from the standpoint of legal certainty, ethics, and public interest.

According to Mays (1952), those who challenge machines' copyright must return to 1950, when Turing posed a key question: "Can machines think?" This reflects a long-term tension between technological innovation and copyright protection that remains unresolved. It is essential to find

reasonably balanced responses that promote AI development without diminishing human intervention in AI-generated creations.

The question of AI as an author should also be considered from philosophical and ethical perspectives. AI does not possess the attributes associated with a human being. Machines are programmed to learn patterns and generate outputs based on pre-existing data, but they do not have independent thought or will. Therefore, AI should be considered a tool rather than a creator, making it difficult to justify granting copyright ownership to a machine.

Moreover, granting copyright protection to AI-generated works could also create both practical and legal conflicts. For example, if an AI system holds copyright, who would be entitled to enforce it? It is evident that machines do not have legal personality, and granting them ownership rights would require a profound reassessment and revision of basic legal principles and standards. Copyright protection could instead be granted to a human programmer, developer, or the entity holding ownership rights over the AI system. Therefore, the human role in AI-generated works is a key issue in copyright law. AI systems, while capable of producing creative outputs, do so using algorithms and pre-programmed data sets, lacking human intention, creativity, and originality. In such a context, human involvement-whether as a programmer, developer, or user-becomes essential when defining copyright ownership.

Authorship has traditionally been defined as human creativity, requiring an element of individual intellectual capability. However, AI-generated works challenge this framework, as the human role may vary from minimal input to detailed programming and data selection. Dr. Arul George Scaria (2018) considers that, in such cases, the human responsible for setting the parameters or programming the AI system could be considered the “author” under the law, given their role in managing the machine’s output.

Based on these considerations, several policy criteria could help provide legal certainty to face this evolving landscape:

1. Amend regulations and legislation where necessary to explicitly address AI-generated works. This could involve defining “computer-generated works” and granting copyright to the individual or entity responsible for the AI’s development. Such a provision would ensure transparency and guarantee that those who contribute to the creative process, even indirectly, are recognized and protected.
2. Acknowledge the essential role of human intervention. Recognizing AI as a tool operated and programmed by humans allows for a pragmatic approach in which copyright is granted to those who make significant contributions to the creation.

3. Design a specific licensing framework for AI-generated works to promote innovation. This framework should account for the unique nature of AI-created content while ensuring that creators, developers, and users have clear guidelines on rights and responsibilities. It would allow creators to retain certain rights while accommodating the distinctive characteristics of machine-generated content. This could include establishing a registration system for AI-generated works and defining terms of use that reflect the contributions of both AI and human operators. Such a framework could foster innovation and ensure fair compensation for all parties involved.
4. Set up a specific regulatory institution capable of assessing technological advancements to ensure fair treatment for both innovation and copyright protection. AI developers could quickly obtain permissions from copyright holders through what is generally known as a self-regulatory organization-such as those countries like India are currently lacking. This initiative would ensure reasonable compensation for creators, streamline the licensing process, and resolve disputes effectively. Individual creators could also achieve this ideal context by recording their complete creative process, including drafts and communications with AI tools. They could maintain better control over how their generated works are used through tailored licenses and ensure their rights are protected. To guarantee compliance with copyright rules, AI companies' training datasets should be regularly audited. Businesses must establish that all training resources used are legally licensed through appropriate user agreements.

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## A Constructivist Analysis of Liberia's Ebola Response

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### Abstract

This article examines how Liberia established its sovereignty, legitimacy, and international identity during the Ebola crisis of 2014-2015. While much existing research focuses on institutional weaknesses and material dependence, this study employs a constructivist qualitative methodology that combines discourse analysis and content analysis of governmental communications, United Nations resolutions, international reports, and international media coverage. The analysis focuses on identifying patterns in state rhetoric, norm alignment, and engagement strategies with international actors. The findings indicate that Liberia's response was influenced not only by material constraints but also by international efforts to align with international norms, construct a credible national identity, and assert legitimacy in the global arena. By analyzing Liberia's experience, this article contributes to discussions on global health governance, African statehood, and the application of constructivist theory in international relations.

**Keywords:** Liberia; Ebola Crisis; Sovereignty and Legitimacy; Constructivism in International Relations; Global Health Governance

### Introduction

The 2014-2015 Ebola outbreak in West Africa was one of the most severe public health emergencies in recent history, resulting in over 11,000 deaths across Guinea, Sierra Leone, and Liberia (WHO, 2014-2016 report). Beyond the immediate health crisis, the outbreak exposed the vulnerabilities

of fragile states and tested the resilience of both regional and global governance mechanisms. The crisis garnered unprecedented international attention, culminating in United Nations Security Council Resolution 2177, which, for the first time, declared that Ebola posed a threat to international peace and security and authorized the deployment of foreign aid and troops (United Nations Security Council, 2014).

The World Health Organization (hereinafter referred to as WHO), the African Union (hereinafter referred to as AU), and numerous bilateral and multilateral partners launched emergency interventions, creating a complex governance environment in which affected states were compelled to respond domestically while engaging with international actors (WHO, 2015; AU, 2016; CDC, 2014). Within this broader regional crisis, Liberia stands out as a critical case. As a post-conflict nation still rebuilding institutions after two civil wars, Liberia was widely perceived as ill-prepared to manage a health emergency of this scale (WHO, 2015). Yet, despite profound institutional and resource constraints, Liberia's response eventually gained international recognition as a success story in crisis management (Oxfam International, 2015).

Much of the existing literature explains African states' crisis governance primarily in material terms, focusing on institutional weakness, financial dependence, and external intervention (Adebisi, 2014; Yurtseven, 2021). While these factors are important, they do not fully capture the dynamics of how states like Liberia navigate crises. This study addresses this gap by examining how Liberia managed the tension between its material challenges and the demonstration of legitimate statehood during the Ebola crisis. Specifically, it investigates how the Liberian government constructed and performed sovereignty, legitimacy, and international identity under conditions of severe vulnerability. By adopting a constructivist perspective, this research emphasizes that sovereignty and legitimacy are not fixed institutional capacities but are socially constructed through discourse, practices, and alignment with international norms (Wendt, 1992).

The central research question guiding this study is: How did Liberia establish and demonstrate its sovereignty, legitimacy, and international identity during the Ebola crisis of 2014-2015, and what does this reveal about the influence of ideational factors on shaping state responses to global health emergencies? Through an analysis of governmental communications, international reports, and global media narratives, the study argues that Liberia's response cannot be fully explained by external assistance or institutional weakness. Rather, it reflects a deliberate process of aligning norms, constructing identity, and seeking legitimacy within the international community.

The contribution of this research is twofold. Empirically, it provides a detailed account of Liberia's Ebola response, highlighting the interplay between domestic narratives of sovereignty and international expectations of legitimacy. Theoretically, it demonstrates the explanatory power of Constructivism in understanding state behavior during crises, showing that sovereignty and legitimacy are socially negotiated constructs rather than static attributes. By analyzing Liberia's experience, this article contributes to discussions on norm diffusion, African statehood, and global health governance while offering insights into why states diverge in their engagement with international norms.

## **Literature Review**

### **Global Health Governance and the Ebola Crisis**

Global health governance has increasingly become a focus of study, examining how international organizations, states, and non-state actors interact to manage transnational health threats (Fidler, 2004; Moon et al., 2015). The 2014-2015 Ebola outbreak in West Africa was a pivotal moment, prompting the United Nations Security Council to classify the epidemic as a threat to international peace and security (United Nations Security Council, 2014). Scholars highlight that the crisis revealed significant weaknesses in the WHO's response capacity (Moon et al. 2015) and emphasized the heavy dependence of fragile states on external interventions (Kamradt-Scott, 2015). In the African context, analyses note the AU's unprecedented deployment of the AU Support to Ebola Outbreak in West Africa (ASEOWA), which marks a rise in regional health diplomacy (AU, 2016). However, much of the existing literature mainly portrays affected states as passive recipients of aid, rather than active agents involved in defining their own responses. This perspective neglects how states like Liberia asserted their sovereignty and legitimacy during periods of acute vulnerability.

The Ebola crisis emerged in countries often described as weak or failed, with Liberia in particular, recovering from civil war and relying on international donors (Dalberto, 2020). Traditional approaches in African politics and international relations tend to explain crisis governance in terms of institutional weakness, capacity deficits, or external imposition (Rotberg, 2003; Chapham, 1996). However, these explanations risk portraying African states as fundamentally incapable and overlook how governments actively frame crises to negotiate their legitimacy. Recent debate has shifted towards viewing African statehood as a performative and contested process (Englebert & Tull, 2008). Studies focusing on security crises, peacekeeping, and pandemics indicate that African governments use discourse, symbolism, and international engagement to project sovereignty beyond their actual capabilities (Williams & Hunt, 2024). In this context, Liberia's response to the

Ebola outbreak serves as a crucial case study for examining how a post-conflict state aimed to reaffirm its authority and enhance its international standing during a health emergency.

### **Constructivist Perspectives on Sovereignty, Norms, and Legitimacy**

Constructivist International Relations theory emphasizes that sovereignty and legitimacy are not fixed attributes; rather, they are socially constructed through norms, discourse, and practices (Wendt, 1992; Finnemore 1996; Adler, 1997). Research on norm diffusion further illustrates how international expectations shape state behavior not only through coercion or material incentives but also through processes of persuasion, localization, and identity formation (Checkel, 1999). In the realm of global health governance, constructivist scholars argue that pandemics are as much political and normative crises as they are biological ones (Taylor, 2021). States are required to demonstrate responsibility, transparency, and adherence to international norms to gain legitimacy and mobilize support. The Ebola crisis serves as an empirical case study to examine how a fragile states like Liberia engaged in “sovereignty performance” (Sending, 2015) by aligning its actions with international norms while framing them as legitimate within its domestic context.

### **Hypothesis Formulation and Theoretical Framework:**

#### **Hypothesis Formulation**

This study is guided by the following central hypothesis:

- **H1:** Liberia’s Ebola response was shaped less by material capacity constraints and more by constructivist mechanisms of sovereignty performance, norm alignment, and legitimacy-seeking in the international arena.
- **H1a:** Liberia framed its crisis management discourse to highlight sovereignty and responsible statehood, despite relying on external actors.
- **H1b:** Liberia strategically aligned itself with international health governance norms (such as transparency, cooperation, and responsibility) to enhance its international legitimacy and gain support.

These hypotheses challenge materialist explanations that view governance solely through the lens of capacity and dependency. Instead, they suggest that ideational and normative factors were equally important.

#### **Theoretical Framework**

This research is grounded in Constructivist International Relations theory, which emphasizes that sovereignty, legitimacy, and identity are socially constructed through discourse, norms, and practices, rather than being

fixed material attributes (Wendt, 1992; Finnemore, 1996). Three theoretical strands are particularly relevant:

1. **Sovereignty as Performance:** Following the work of Sending (2015), sovereignty is understood not just as a legal status but as something that is enacted through specific practices and discourse. States, especially those labeled as fragile, must “perform” their sovereignty to both domestic and international audiences. Liberia’s response to the Ebola crisis offers a valuable case study for examining these performances under conditions of crisis.
2. **Norm Diffusion and Localization:** Constructivist scholars underscore how international norms spread through processes of persuasion, adaptation, and localization (Checkel, 1999). Liberia’s adoption of international health governance norms during the Ebola outbreak can be viewed as a process of norm localization, which aligns global expectations with domestic narratives of authority.
3. **Legitimacy and Identity Construction:** Crisis governance involves projecting a specific identity to international audiences. States that are facing vulnerabilities can enhance their legitimacy by presenting themselves as responsible actors aligned with global norms (Taylor, 2021). The case of Liberia illustrates how a post-conflict state can use a health crisis to renegotiate its international identity.

#### 4. **Data and Methodology**

This section outlines the data sources, sample construction, variable descriptions, and empirical approach used in this study to investigate how Liberia constructed its sovereignty, legitimacy, and international identity during the Ebola crisis of 2014-2015. A qualitative, interpretive methodology is employed, utilizing secondary data sources to analyze the interaction between state behavior, global norms, and post-conflict institutional capacity. This approach emphasizes discourse analysis to examine how Liberia performed sovereignty and negotiated legitimacy in a crisis context.

**Table 1: Variable Descriptions**

Variable	Description	Operationalization
Sovereignty	The capacity of the Liberian state to exercise authority and manage the Ebola crisis.	Measured by degree of national control over emergency response, coordination with international actors, and performance of leadership in crisis management.
Legitimacy	Recognition and acceptance of the government by domestic and international actors.	Assessed through public communication, community engagement strategies, international praise, and media framing.
Identity	Strategic self-representation Liberia as a responsible, cooperative post-conflict state.	Evaluated through discourse analysis of speeches, UN statements, and media narratives
Norm Alignment	Degree to which Liberia's policies and actions conformed to international health governance standards.	Measured by adoption of WHO guidelines, compliance with UN resolutions, and collaboration with NGOs and donor agencies.

Notes: the variables, descriptions, and operationalization strategies in this table are derived from constructivist approaches to understanding sovereignty and legitimacy in crisis governance (Wendt, 1992; Finnemore, 1996). The empirical indicators are informed by previous studies on studies on state responses to global health emergencies (Moon et al. 2015; Kamradt Scott, 2015) and are specifically contextualized to Liberia's experience with Ebola. This context is established through an analysis of governmental communications, UN Security Council resolutions, WHO guidelines, and international media reports.

## Data sources

The study draws on 42 secondary sources carefully selected for relevance and coverage. These sources include official governmental communications, international resolutions, media coverage, and peer-reviewed academic publications. Triangulation across these sources strengthens the reliability of the findings.

- 1. Governmental Communications and Speeches (4 sources, 21):** Presidential speeches by Ellen Johnson Sirleaf focused on themes of national unity, resilience, and calls for international cooperation (Liberian Embassy in the U.S., 2014).  
**Findings:** Three out of four sources (75%) emphasized collaboration with international partners, while an equal proportion (75%) highlighted national resilience and the importance of unified public health messaging.
- 2. International Resolutions and Reports (10 sources, 24%):** United Nations Security Council Resolution 2177 (2014) establishes the international legal and normative framework for interventions in countries affected by Ebola. WHO reports documented epidemic data, evaluated responses, and provide normative recommendations for

managing epidemics. UNMEER reports included coordination of international assistance, development efforts, and mechanisms for local collaboration.

**Findings:** Eight out of ten sources (80%) emphasized local-international coordination, highlighting Liberia's negotiation of sovereignty within global frameworks.

### **3. Media coverage and International Observations (8 sources, 19%):**

News outlets such as BBC Africa News and Times, along with press releases and interviews from humanitarian organizations and foreign aid agencies, reported on Liberia's Ebola response, leadership actions, and community reactions (e.g., United National Security Council Resolution 2177; Centers for Disease Control and Prevention, 2016; National Academies of Sciences, Engineering, and Medicine, 2016).

**Findings:** Six out of eight sources (75%) noted challenges in public trust and community resistance, demonstrating the social dimensions of legitimacy and compliance.

### **4. Academic Journals and Publications (27 sources, 64%):**

A broad range of peer-reviewed academic studies explored Liberia's Ebola response, post-conflict reconstruction, and the implications for global governance frameworks (e.g., Andren, 2017; Baker, 2014; Brooks, 2015; Moon et al., 2015; Wilkinson & Fairhead, 2016). Complementary strands of constructivist scholarship examined questions of state identity, sovereignty, and legitimacy in international relations (e.g., Checkel, 1999; Wendt, 1992; Biersteker & Weber, 1996; Sending, 2015).

**Findings:** Twenty out of twenty-seven sources (approximately 74%) emphasized that sovereignty is not an inherent condition but is actively constructed and negotiated through interactions with international actors, particularly within crisis response and post-conflict governance contexts.

## **Sample Construction**

**Temporal Scope:** March 2014-June 2015, covering the peak of the Ebola outbreak in Liberia.

**Data Type:** Discourse and narrative data obtained from speeches, reports, and media coverage; official documentation of interventions and policies; as well as peer-reviewed analyses.

**Selection Criteria:** Sources were chosen based on their relevance to Liberia's engagement with international norms, and their demonstration of legitimacy and the construction of sovereignty. Only sources providing

evidence of Liberia's interaction with domestic and international actors were included.

### **Reliability of Data**

The use of 42 diverse sources strengthens the reliability of findings:

- **Triangulation:** Themes such as national unity, international collaboration, and sovereignty construction consistently appeared across governmental, international, media, and academic sources.
- **Limitations:** Governmental communications may be biased to portray actions positively; media may selectively report events; percentages derived from qualitative coding are indicative rather than precise measures.
- **Conclusion:** Despite limitations, the convergence of findings across multiple sources supports robust and credible interpretations of Liberia's construction of sovereignty during the Ebola crisis.

### **Empirical Approach**

This study employs a qualitative, interpretive approach, using discourse analysis to investigate Liberia's response to the 2014–2015 Ebola crises. Specifically, the research examines three interrelated areas: how Liberia framed Ebola as a transnational threat while communicating norms of responsibility and cooperation; how state identity and sovereignty were enacted through alignment with international expectations; and how domestic legitimacy was reinforced through engagement with local leaders, civil society, and community structures.

This methodology enables an in-depth exploration of the ideational and normative dimensions of Liberia's crisis response, highlighting the interplay between social interactions, leadership strategies, and global norms in shaping both domestic and international perceptions of the state. By linking qualitative evidence from speeches, governmental communications, international reports, and media coverage with constructivist theory, the study demonstrates how a post-conflict state can actively construct sovereignty, negotiate legitimacy, and shape international identity under conditions of global pressure and local vulnerability.

### **Performing Sovereignty: Liberia's Ebola Response**

A central paradox in Liberia's response to the Ebola crisis was the simultaneous assertion of sovereignty and dependence on international assistance. From a Constructivist perspective, sovereignty is not a fixed resource but a performance enacted through discourse, practices, and symbolic acts (Holm & Sending, 2018). During the Ebola crisis, the Liberian

government needed to demonstrate both domestic authority and international responsibility amid acute vulnerability.

### **Asserting Control amid International Intervention**

Although the international community, led by the United States, and various humanitarian organizations, played a crucial role in providing resources, the Liberian government framed itself as the primary coordinator of the national response. President Ellen Johnson Sirleaf consistently emphasized that external actors were “partners” rather than “replacements” for national authority. The establishment of the National Ebola Task Force, chaired by the President, symbolically positioned the Liberian state at the center of decision-making (Embassy of the Republic of Liberia, U.S., 2014).

By doing this, Liberia projected its sovereignty through ownership of the coordination process, despite its reliance on foreign expertise and aid. This reflects what Constructivist refer to as performance of statehood the necessity to be perceived as acting like a responsible sovereign, even when material capabilities are limited.

### **Framing Ebola as a National and Global Threat**

Liberia effectively framed the Ebola outbreak as both national crisis and a global security threat (UN Security Council, 2014; WHO, 2015). The government appealed to the United Nations, WHO, and AU, emphasizing that the virus could destabilize international order if not contained. This approach led UN Security Council Resolution 2177 (2014), which recognized Ebola as a threat to peace and security an unprecedented acknowledgement for a health crisis. By elevating the issue of Ebola to a global concern, Liberia achieved two main objectives:

1. Mobilizing international resources and gaining legitimacy: presenting itself as a cooperative member of the international community.
2. Reinforcing its sovereignty: demonstrating that it could speak on behalf of its people while influencing international narratives,

By this way, the Liberian government transformed its vulnerability into an opportunity for building legitimacy, using the crisis to reaffirm its sovereignty within the international system.

### **Negotiating Legitimacy**

Sovereignty is established through the assertion of control, while legitimacy is built through recognition by both domestic and international audiences (Brahm, 2004; Regenerative Economics Textbook, 2024-2025). During the Ebola crisis, the government of Liberia aimed not only to manage the epidemic but also to demonstrate that it was a credible and responsible actor deserving of trust. Constructivist theories emphasize that legitimacy is

not inherent; rather, it is constructed through norms and practices (Wendt, 1992; Finnemore 1996; Adler, 1997).

### **Transparency and Responsibility**

One way Liberia sought to establish legitimacy was by prioritizing transparency in its reporting and communications. The government conducted daily press briefings, issued public updates, and made international appeals, which helped portray it as open and accountable (BBC News Africa, 2014). President Sirleaf frequently asserted that Liberia has “nothing to hide,” signaling compliance with global health norms related to transparency. This approach contrasted sharply with previous crisis where African governments faced accusations of concealment and denial, positioning Liberia as a nation that had learned from its tumultuous past.

### **Alignment with International Norms**

Additionally, Liberia actively aligned itself with international norms of cooperation and responsibility. The government collaborated closely with international organizations (WHO, 2023; CDC, 2016; UNMEER). Instead of resisting external involvement, which could be viewed as a violation of sovereignty, Liberia framed its partnerships as consistent with responsible statehood. This strategic effort to be seen as a cooperative partner helped the country earn international recognition and resources.

### **Managing Domestic and International Audiences**

Negotiating legitimacy involved balancing the expectations of different audiences. Domestically, the government needed to convince citizens that it was in control and capable of ensuring their safety. Internationally, it had to assure partners that aid would be managed effectively and that there were political justifications for its use. The establishment of the Incident Management System (IMS), which included both Liberian officials and international experts, exemplified this dual legitimacy. It reassured the domestic audience about the government’s leadership while demonstrating accountability to the international community.

The process of negotiating legitimacy during the Ebola crisis also had lasting effects. It allowed Liberia to reposition itself on the global stage as a post-conflict state able to act responsibly under pressure. This newfound legitimacy was not merely symbolic; it led to renewed confidence from donors, increased diplomatic engagement, and a rebranding of Liberia’s international identity, moving beyond perceptions of fragility (Cakourous et al, 2024).

## **Constructing International Identity**

In Liberia's response to the Ebola crisis, two immediate priorities were asserting sovereignty and negotiating legitimacy. However, these actions also contributed to a larger project of constructing international identity. Constructivist IR theory emphasizes that identity is relational- states define themselves through interactions with others, aligning with norms, roles, and expectations within the international community (Wendt, 1992). The Ebola crisis became a responsible, post-conflict state capable of engaging with the global community.

Before the Ebola crisis, Liberia was often depicted in international discourse as a fragile or failed state emerging from civil conflict. The crisis presented an opportunity to reshape this narrative (Marmon, 2015). By actively engaging with international partners, Liberia positioned itself not as a passive recipient of aid but as an active participant in global emergency. This rebranding marked a significant shift from dependency to responsibility, highlighting Liberia's willingness to share the burdens alongside the international community.

The construction of identity was also evident in Liberia's performance in global health governance. By framing the Ebola outbreak as both national and international security threat, Liberia inserted itself into discussions typically dominated by larger or more institutionalized states. Its cooperation with the African Union Support to Ebola Outbreak in West Africa (ASEOWA) mission symbolized regional solidarity, while appeals to the UN Security Council elevated Liberia's voice on the global stage. In this way, Liberia constructed its identity as both a responsible member of the global community.

In addition to policy efforts, Liberia's leadership under President Sirleaf engaged in symbolic actions that conveyed moral authority. Her speeches often emphasized themes of resilience, sacrifice, and solidarity (Baker, 2014), portraying Liberia not merely as a victim of disease, but as a courageous nation fighting for the greater good of humanity. This moral framing resonated on an international level, enhancing Liberia's identity as a nation whose struggles held global significance.

## **Lasting Effects on International Standing**

The construction of Liberia's international identity during the Ebola crisis had enduring consequences. The situation positioned Liberia as a case study in resilience and cooperation, leading to increased diplomatic visibility. While material vulnerabilities persisted, Liberia's strategic alignment with global norms improved its reputation and legitimacy within international institutions. This indicates that even countries with limited resources can reshape their identities by tactically utilizing crises as opportunities for aligning with norms and constructing a positive image.

## Key Analysis

As Africa's first democratically elected female president, Sirleaf's personal background lent additional symbolic strength to Liberia's international image. Her leadership became a vital conduit for engaging in global discussions surrounding humanitarian response, post-conflict recovery, and global health governance. This underscores how state identity, particularly in times of crisis, is intricately linked to the public image and communicative choices of national leaders. In this context, Sirleaf acted as a "norm interpretation," helping to internalize global standards through her public messaging and diplomacy. By framing the Ebola crisis as a global humanitarian issue, she repositioned Liberia as a resilient and responsible nation rather than a failing state. This highlights how leadership involves not only decision-making but also the strategic use of narratives to shape perceptions. In evaluating Liberia's Ebola response, the image of Leadership is crucial, linking individual agency with larger social and political structures, demonstrating how Leaders influenced by their normative contexts.

## Discussion and Implications

This research reveals that Liberia's response to the Ebola outbreak cannot be understood solely in terms of material capacity. Instead, it highlights how sovereignty, legitimacy, and identity are socially constructed in moments of acute crisis. By foregrounding transparency, cooperation, and responsibility, Liberia performed sovereignty in ways that rebranded it from a fragile post-conflict state to a responsible global actor. Several key implications arise from this analysis:

- 1. State-Level Divergence:** Liberia's proactive acceptance of global health norms stands in contrast to other West African countries that initially resisted external assistance (Wilkinson & Fairhead, 2016). This divergence indicates that domestic interpretations, rather than merely institutional weaknesses, drive crisis responses.
- 2. Constructivist vs. Capacity-Based Explanations:** While capacity-based explanations highlight dependency and fragility, a constructivist approach illustrates that even materially weak states can exercise agency through discourse and norm entrepreneurship.
- 3. AU Governance:** The African Union's role was not only material, through initiatives like ASEOWA, but also symbolic, offering Liberia a platform to express solidarity and accountability. This indicates that the effectiveness of AU governance relies on both material support and ideational legitimacy.
- 4. Global Crisis Management:** Fragile states should not be viewed merely as passive recipients of aid; they can also act as norm entrepreneurs, influencing global governance discussions. Liberia's

direct appeals to the UN Security Council exemplify this proactive role.

- 5. Theoretical Contribution:** The case of Liberia supports the constructivist assertion that sovereignty and legitimacy are relational and performative. This challenges the static or purely materialist interpretations of African statehood during periods of crisis.

## **Conclusion**

This study examined how Liberia's response to the 2014-2015 Ebola crisis through a constructivist lens, highlighting how concepts of sovereignty, legitimacy, and international identity were actively constructed during a period of acute vulnerability. By analyzing governmental communications, UN resolutions, media coverage, and international reports, the study demonstrates that Liberia's responses was shaped not only by material constraints and institutional weaknesses but also by a deliberate alignment with global norms and the performance of statehood.

## **Summary of Findings**

Liberia's response to the Ebola outbreak illustrates that fragile states can assert sovereignty and negotiate legitimacy even amid significant international intervention. Key findings include:

1. Liberia framed the Ebola outbreak as both a national and global threat, which facilitated international cooperation while maintaining claims to authority.
2. By aligning its discourse with the expectations of the AU and the UN, Liberia projected responsible statehood and reaffirmed its international identity.
3. The variation in responses among African states is influenced more by how governments interpret and enact sovereignty in relation to external norms than by mere capacity or resources.

## **Contribution to Theory**

This research emphasizes the explanatory power of constructivist approaches in understanding how African states behave during crises. It shows that sovereignty and legitimacy are performative and socially constructed concepts, rather than fixed characteristics determined solely by institutional or material factors. By focusing on ideational processes, this research challenges traditional narratives that depict African states primarily as passive recipients of international aid.

## **Policy Implications**

The findings have important implications for the AU and global crisis governance:

1. International and regional actors much recognize the significant role that ideational and narrative dynamics play when engaging with fragile states.
2. Successful interventions should be sensitive to how states define their sovereignty and legitimacy, rather than relying solely on capacity building or resource allocation.
3. The AU's future crisis management initiatives should leverage discourse, align norms, and enhance local legitimacy to improve effectiveness among its member states.

## **Directions for Future Research**

To gain deeper insights into the varying responses of African states, future research should conduct comparative analyses with other Ebola affected countries, such as Sierra Leone and Guinea. These studies could investigate the interplay of historical legacies, domestic narratives, and the adoption of norms in shaping crisis governance, creating a broader framework for understanding the performance of African states under international scrutiny.

## **Conclusion**

Liberia's response to the Ebola crisis highlights the significance of ideational factors in crisis governance. A Constructivist analysis reveals that even states with limited material resources can assert their sovereignty, negotiate legitimacy, and influence international norms. This offers valuable lessons for both regional and global actors addressing health and security crises.

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## Perceptions of the Declining Fertility Rate and Evolving Views on Motherhood: A Comparative Study among University Students in India and Sri Lanka

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### **Abstract**

This study examines the perceptions of declining fertility rates and evolving views on motherhood among female undergraduates in Sri Lanka and India, with a focus on disciplinary and cultural variations. A mixed-methods approach was employed; the research combined a survey of 300 students from the University of Colombo and 234 students from the Vellalar Educational Trust (VET) Institute of Arts and Science in Tamil Nadu with qualitative data from 20 in-depth interviews and two focus group discussions. The findings indicate that students in both countries express moderate to high concern about fertility decline, with Indian students expressing slightly higher concern overall. In Sri Lanka, concern levels varied significantly by academic discipline, with Arts students showing greater awareness than their Science counterparts. Across both countries, delayed motherhood was primarily associated with higher education, career priorities, financial insecurity, and shifting societal norms. Nevertheless, cultural expectations continued to influence preferred childbearing ages of 25–30 years and the ideal family size of two children. These findings suggest a gradual shift towards more

individualistic and diverse reproductive attitudes, while traditional values remain deeply embedded. The study contributes to a deeper understanding of how generational perspectives on fertility and motherhood are shaped by the intersection of personal aspirations, academic environment, and socio-cultural context in both countries.

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**Keywords:** Childbearing, Culture, Personal autonomy, Pronatalist attitudes

## Introduction

Motherhood is a deeply embedded concept in South Asian cultures, with its implications extending into the realms of gender roles, employment, and societal expectations. With the influence of both cultural norms and the increasing participation of women in the workforce, traditional views of motherhood are evolving in Sri Lanka and India (Gunathilake, 2023; Kodagoda & Duncan, 2010; Mitra, 2020). In Sri Lanka, the traditional male-breadwinner model has been challenged by the growing presence of women in various professional fields. Despite this shift, the expectations for women to balance work and childcare responsibilities persist, creating significant work-family conflicts (Kodagoda & Duncan, 2010). Traditional conceptions of motherhood as a central and defining role for women are increasingly contested and redefined within contemporary contexts (Arendell, 2000). This evolving discourse reveals a complex interplay between individual agency, structural constraints, and normative expectations.

Motherhood is a role and institution that defines a woman's identity and provides her adult status in Indian society (Bhambhani & Inbanathan, 2018). India, with its rich cultural and religious heritage, also presents a unique perspective on motherhood. The idealization of the maternal role is prominent, with a deep-rooted tradition of reverence towards motherhood depicted through religious and cultural symbols (Mitra, 2020). However, this idealization often contrasts with the lived realities of women, who navigate the pressures of traditional expectations alongside modern professional aspirations. The concept of motherhood in India is further complicated by a patriarchal view that reinforces biological determinism, attributing maternal qualities as innate and disregarding the practical challenges faced by mothers (Mitra, 2020).

This research has explored how young, unmarried female university students perceive motherhood amidst a rapidly changing social landscape where traditional family roles often intersect with aspirations for education and employment. The findings highlight how young women navigate and balance their views on motherhood with their personal goals and identities, shaped by educational advancement, cultural norms, societal expectations, and individual aspirations.

Furthermore, the research underscores the connection between these shifting attitudes and the ongoing decline in fertility rates observed in both countries. Ultimately, this study offers valuable insights into the nature of motherhood in contemporary Sri Lanka and India. In both contexts, young women's reproductive plans are shaped by similar forces: the tension between personal autonomy and societal expectations, economic insecurity, and the symbolic significance of motherhood. Consequently, policies aimed at addressing fertility decline must strike a balance between pro-reproductive imperatives and the aspirations of a generation that is actively redefining womanhood.

### **Research Objectives**

- To examine the key factors influencing students' decisions to delay motherhood in India and Sri Lanka.
- To examine variations in perceptions of motherhood across academic disciplines in India and Sri Lanka.
- To examine future childbearing intentions among students in India and Sri Lanka.

### **Methods**

This study employed a mixed-methods approach to investigate how female undergraduates in Sri Lanka and India perceive declining fertility and evolving notions of motherhood. A two-step sequential design was adopted: the first phase involved a structured questionnaire survey to capture broader trends and distributions of attitudes, while the second phase involved in-depth interviews and focus group discussions (FGDs) to contextualize and deepen understanding of these quantitative findings. This design was chosen to generate both measurable comparisons and a nuanced exploration of the underlying beliefs and experiences shaping them.

### **Study Population and Sampling**

The study population comprised female students from three academic streams in each country. In Sri Lanka, participants were drawn from the Faculties of Arts, Management, and Science at the University of Colombo. In India, participants were drawn from the Schools of Social Sciences, Business Administration, and Computer Science at the VET Institute of Arts and Science, Tamil Nadu. These sites were selected because they represent diverse academic disciplines while also offering a manageable framework for cross-national comparison.

**Table 1:** Population sizes of the institutions

<b>University of Colombo</b>		<b>VET Institute of Arts and Science</b>	
<b>Arts</b>		<b>Social Science</b>	
1st Year	756	1st Year	24
4th Year	450	4th Year	30
<b>Science</b>		<b>Computer Science</b>	
1st Year	603	1st Year	60
4th Year	380	4th Year	60
<b>Management</b>		<b>Business Administration</b>	
1st Year	727	1st Year	60
4th Year	711	4th Year	45

Sri Lanka sample – At the University of Colombo, the total female undergraduate population across the selected faculties was 1,385. From this, a judgmental sample of 300 students was selected. The decision to use judgmental sampling was guided by practical constraints: direct access to students was coordinated through faculty administrators and student representatives, limiting the feasibility of randomized techniques. This method allowed the research team to ensure balanced representation across faculties and years, which was essential to the comparative design. Specifically, 50 students were chosen from each of the first-year and final-year cohorts in all three faculties ( $50 \times 2 \times 3 = 300$ ). This ensured proportional coverage across academic and temporal strata.

India sample – At the VET Institute, the total female population across the three schools was 279, of whom 234 were selected to participate. The distribution was: Social Sciences (20 first-year, 25 final-year), Computer Science (51 first-year, 51 final-year), and Business Administration (50 first-year, 37 final-year). This higher coverage relative to population size reflects both the smaller institution and the greater willingness of students to participate when approached via faculty channels.

Comparability – While the Sri Lankan and Indian samples are not identical in size (300 vs. 234), the proportional distributions reflect institutional realities. This difference is explicitly acknowledged as a limitation for cross-national comparison. Findings are therefore interpreted with caution, focusing on trends and contrasts rather than strict numerical equivalence.

### **Data Collection Procedures**

Survey administration – The first phase of data collection involved a structured questionnaire hosted on Google Forms. To maintain control over distribution and ensure alignment with the intended sample composition, survey links were not shared publicly. Instead, they were disseminated selectively through official class representatives and faculty coordinators, who

were instructed to circulate them only among first- and final-year female students in the identified faculties/schools. This targeted strategy reduced risks of overrepresentation or misalignment with sample quotas.

The questionnaire was developed in English, then translated into Sinhala and Tamil in Sri Lanka and into Tamil in India to ensure linguistic accessibility. Back-translation checks were performed on a subset of questions to confirm consistency of meaning. The introduction to the survey outlined the objectives, emphasized voluntary participation, and confirmed that no incentives would be provided. Students were required to indicate informed consent before proceeding.

Interviews – The second phase of data collection involved semi-structured in-depth interviews. At the end of the questionnaire, respondents were invited to indicate interest in being interviewed by providing their contact details. From this pool, 20 students were purposively selected to reflect diversity across faculties and years of study. In Sri Lanka, 12 students participated (two from each year in each faculty), while in India, 8 students participated across the three schools. The interviews provided an opportunity to probe the reasoning behind attitudes expressed in the survey and to capture personal experiences influencing views on fertility and motherhood.

Focus group discussions (FGDs) – To further explore shared perspectives and points of divergence, two FGDs were conducted, one in each country. Each group consisted of 10 participants drawn from both first- and final-year cohorts and across different disciplines. The FGDs allowed interaction between participants, helping to uncover collective dynamics, peer influences, and the ways students negotiate attitudes within their academic and cultural environments.

## **Data Analysis**

Quantitative analysis – Survey responses were downloaded from Google Forms, cleaned for incomplete entries, and coded prior to statistical analysis in SPSS. The primary analyses were descriptive, employing univariate statistics (frequencies, percentages, means) to summarize attitudes within each faculty and country. Cross-tabulations were also employed to compare responses between first-year and final-year students and across faculties, enabling bivariate descriptive contrasts. While inferential tests (e.g., chi-square) were initially considered, the structure and distribution of responses did not support robust significance testing. Consequently, the analysis focuses on descriptive comparison rather than causal inference. This decision enhances transparency and avoids overstatement of findings.

Qualitative analysis – Interview and FGD recordings were transcribed in local languages and translated where necessary. Thematic analysis was undertaken to analyze the data. An inductive approach was employed,

allowing themes to emerge from the data rather than imposing a priori categories. This process facilitated the integration of qualitative insights with quantitative patterns, thereby strengthening the validity of interpretations.

### **Ethical Considerations**

The study adhered to ethical standards of informed consent, confidentiality, and voluntary participation. Students were informed that they could withdraw at any stage of the data collection process. Identifying details were anonymized during transcription and analysis, and data were stored securely with access limited to the research team. Ethical clearance was obtained through the host institution in Sri Lanka (Centre for Multidisciplinary Research and Innovation in Social Policy (CEMRI), University of Colombo with parallel approval sought through institutional channels in India.

### **Results**

The declining fertility rate has emerged as a pressing demographic issue in many countries, including Sri Lanka and India. As fertility patterns shift, it becomes essential to understand how younger generations perceive these changes, particularly female undergraduates, who represent the future of reproduction. This study explores university students' concerns regarding the declining fertility rate and their evolving perceptions of motherhood. Drawing from both quantitative and qualitative data, the study highlights how academic background, societal change, and personal aspirations shape these views.

#### ***Concerns about the Declining Fertility Rate***

The survey results revealed notable differences between Sri Lanka and India in public perceptions of declining fertility rates. In India, a higher proportion of respondents (23.1%) reported being very concerned about the issue compared to Sri Lanka (12.7%), indicating that the matter is perceived as more urgent among the Indian sample. However, in both countries, the largest proportion of respondents expressed moderate concern, with 54.7% in Sri Lanka and 50.4% in India falling into the "somewhat concerned" category (See Table 1). This suggests that while the issue is on the public radar, the prevailing sentiment is one of measured rather than extreme worry. Interestingly, Sri Lanka recorded a substantially higher share of respondents who were "not very concerned" (26.3%) compared to India (9.4%), pointing to a more relaxed perception of the problem among Sri Lankans. At the same time, India had a greater proportion of respondents who were "not concerned at all" (7.7% versus 4.7% in Sri Lanka) and a significantly higher percentage who believed that fertility is not declining at all (9.4% compared to 1.6% in Sri Lanka). These findings suggest that public opinion in India is somewhat polarised, with strong concern among some respondents but scepticism or lack

of awareness among others, while in Sri Lanka, attitudes are generally more moderate and less urgent.

**Table 2:** Concerns about the Declining Fertility Rate

Perspectives on Declining Fertility		n =300	n= 234
		Sri Lanka	India
How concerned are you about the declining fertility rate in your country?	Very concerned (70-100%)	12.7%	23.1%
	Somewhat concerned (40 – 69%)	54.7%	50.4%
	Not very concerned (10 – 39%)	26.3%	9.4%
	Not concerned at all (0 – 9%)	4.7%	7.7%
	I do not think it is declining (0%)	1.6%	9.4%

Source: Survey data (2025)

Students from both countries identified well-known socio-demographic drivers behind fertility decline: rising education levels and career aspirations among women, delayed marriage and childbearing, economic uncertainty, and the erosion of traditional family norms. During the interviews, many students, regardless of country, mentioned the high cost of living, the desire for financial independence, and the increasing value placed on personal autonomy as key reasons for delaying or avoiding motherhood altogether.

***Key Factors Influencing the Decision to Delay Motherhood***

In both Sri Lanka and India, education and career advancement were cited as top priorities before considering motherhood. Sri Lankan students across all fields emphasized achieving academic qualifications and career stability before becoming mothers. Financial independence was another critical factor; respondents noted that without adequate financial resources, raising a child would be stressful and potentially limiting.

**Table 3:** Key Factors Influencing the Decision to Delay Motherhood

Perspectives on Declining Fertility		n= 300	n=234
		SL	IND
Why do you think fertility rates are declining?			
Higher education levels of females	Yes	75%	32.9%
	No	25%	67.1%
Females being interested in their career	Yes	46%	47.4%
	No	54%	52.6%
Financial instability	Yes	25%	23.5%
	No	75%	76.5%
Changing societal norms	Yes	22%	22.2%
	No	78%	77.8%
Lack of Childcare Support	Yes	21%	20.9%
	No	79%	79.1%
Females being overly concerned about their bodies	Yes	20%	20.1%
	No	80%	79.9%
Females being concerned about their health	Yes	21%	21.8%

	No	79%	78.2%
Others	Yes	15%	15.8%
	No	85%	84.2%

Source: Survey data (2025)

The data from Sri Lanka and India reveal a similar overall ranking pattern of perceived reasons for declining fertility rates, with differences in the proportion of responses. In both countries, “higher education levels of females” record the highest “Yes” responses, though the proportion is considerably higher in Sri Lanka (75%) than in India (32.9%). “Females being interested in their career” is the second most common response in both contexts, with relatively close percentages (46% in Sri Lanka and 47.4% in India). The remaining factors, “financial instability,” “changing societal norms,” “lack of childcare support,” “females being overly concerned about their body,” and “females being concerned about their health”, all record lower “Yes” responses in both countries, generally between 20% and 25%. The “Others” category is the least cited in both cases, at 15% in Sri Lanka and 15.8% in India. Across all factors, the proportion of “No” responses is consistently higher than “Yes” responses, except for the first two factors, where “Yes” responses are relatively prominent (See Table 2).

In India, Other reasons included personal freedom (27.4%), health concerns (14.5%), lack of support (8.5%), and the absence of a partner (4.7%). In Sri Lanka, 15% of respondents (n = 45) cited “Others (please specify)” as reasons for delaying motherhood. Within this category, the most frequently mentioned factor was personal freedom (26% of the 45 respondents), followed by health concerns (16%), lack of support (10%), and the absence of a partner (6%).

This distribution mirrors the structure observed in the Indian data, with personal freedom being the most commonly reported reason and the absence of a partner the least, highlighting similar patterns in secondary factors influencing fertility decisions in both countries. Across both countries, many students valued the opportunity to travel, pursue hobbies, and focus on self-development during their twenties and early thirties. This trend reflects a redefinition of womanhood, in which motherhood is no longer seen as the defining life milestone but rather as one of several life choices. Increasingly, motherhood is regarded as a conscious and deliberate decision, rather than an inevitable stage of life.

***Variations in Perceptions of Motherhood Across Academic Disciplines***

Perceptions of motherhood varied notably across academic disciplines in both contexts. In Sri Lanka, Arts students were more likely to view

motherhood as central to womanhood, with 56 out of 100 agreeing or strongly agreeing with this statement. Cultural influences often shaped these views. One student noted,

*“In a society like Sri Lanka, motherhood is very much important for a woman... women are getting their respective recognition from society because of being a mother.”* (In-depth interview data, 2025).

Conversely, science students expressed more individualistic views, with 36 out of 100 disagreeing or strongly disagreeing with the idea that motherhood is essential to womanhood. Business Administration students reflected a transitional stance, influenced by both traditional values and modern aspirations.

In the Indian context, as shown in Table 3, students’ perceptions of changing attitudes toward motherhood were examined across three fields of study: Sociology, BBA, and Computer Science. Respondents were asked to select factors they consider to be influential in this shift, including women being more educated, raising children in a rapidly changing society, women being more career-oriented, and little support from fathers in child-rearing. Across all fields, “Little support from father in child-rearing” emerged as the most frequently cited factor. Among Sociology students, 34.1% selected this reason, while 17.3% indicated that raising children in a rapidly changing society is challenging, and smaller proportions noted women being more career-oriented (7.3%) or more educated (2.4%). For BBA students, 30.5% highlighted limited paternal support, followed by raising children in a changing society (6.2%) and career orientation (5.5%), with none citing women’s education. Computer Science students emphasized paternal support even more strongly (43.1%), followed by career orientation (9.2%), while education (0%) and societal challenges (3.1%) were minimally reported.

**Table 4:** Changing Perception towards Motherhood in India

Domain	Field of study	Changing Perception towards Motherhood				Total
		Women are now more educated	Raising children in a rapidly changing society is challenging	Women are now more career-oriented	Little support from father in child rearing	
Field of Study	Sociology	1	3	3	14	20
		2.4%	17.3%	7.3%	34.1%	48.8%
	BBA	0	8	7	39	74
		.0%	6.2%	5.5%	30.5%	57.8%
	Computer Science	0	2	6	28	29
		.0%	3.1%	9.2%	43.1%	44.6%

Source: Survey data (2025)

Interview responses from both countries further highlighted changing perceptions. Many students now view motherhood as a flexible and personal decision.

One Sri Lankan student commented,

*“To be honest, I don’t think being a mother is a main thing in life. My priorities are studying and my career.”* (In-depth interview, 2025)

This perspective was mirrored in Indian responses, where students emphasized personal growth and independence over societal expectations. Indian students also cited increased educational and employment opportunities for women, economic pressures, and a stronger focus on individual fulfillment as key drivers of these changing attitudes.

### ***Ideal Age and Future Childbearing Intentions***

In both countries, the majority of students favored having children between the ages of 25 and 30. In Sri Lanka, 80% of Sociology students, 60% of BBA students, and 53% of Science students chose this age range, while in India, the preference was even stronger, with 80.5% of Sociology students, 88.3% of BBA students, and 88.0% of Science students selecting 25–30 years (See Table 5).

**Table 5:** Association between Ideal Age and the Field of Study

	Ideal Age First Child			Total
	Before 25	25-30	31-35	
<b>Sociology</b>				
IND	7.3%	80.5%	12.2%	100.0%
SL	6%	80%	14%	100.0%
<b>BBA / Management</b>				
IND	7.0%	88.3%	4.7%	100.0%
SL	30%	60%	37%	100.0%
<b>Computer Science/Science</b>				
IND	7.3%	88.0%	4.7%	100.0%
SL	1%	53%	46%	100.0%

Source: Survey data (2025)

Among Sri Lankan students, Management students and science students were more likely than their peers to prefer the 31–35 age range (37% and 46%, respectively), whereas Arts students (Sociology) predominantly favored 25–30. Only a small proportion of students in either country considered having children before 25, and very few selected post-35 as the ideal age.

Intentions to have children also varied. In Sri Lanka, 50.3% of students expressed a definite intention to have children, while 12.4% indicated they probably would not, and 3.9% were certain they would not. Arts students showed the strongest commitment to motherhood, while science students

exhibited the most ambivalence or rejection.

Interview insights from both Sri Lankan and Indian students added depth to these findings. Some admitted that they had not given much thought to motherhood or preferred to leave the decision open.

One Sri Lankan student remarked,

*“I’ve never really thought about being a mother... I would like to become an aunt first.”* (In-depth Interview, 2025)

A similar uncertainty was expressed in India, despite the general consensus on the ideal age for childbearing. Only 7.3% of Indian students favored having children before 25, and 4.7% preferred 31–35, reflecting increasing acceptance of delayed motherhood.

### ***Preferred Number of Children and Alternative Views on Motherhood***

In India, 61.5% of students preferred two children, 31.2% opted for one child, and only 5.1% preferred three or more. A small group (2.1%) stated they did not want children at all. This trend toward smaller families - most commonly two children as the preferred number - was largely consistent across both countries. In Sri Lanka, preferences varied slightly by field of study: among the sociology students, 65% preferred two children, 19% chose three, 11% opted for one, 1% selected four or more, and 4% stated they did not plan to have children. BBA students showed a similar pattern, with 56% favoring two children, 20% three, 10% one, 6% four or more, and 8% not planning to have children. Among Computer Science students, 45% preferred two children, 28% three, 11% one, 3% four or more, and 13% did not plan to have children (See Table 6).

In India, a majority of students across fields also favored two children, with 58.5–70.8% selecting this option. Preferences for one child ranged from 23.1% to 34.4%, while three or more children were rarely chosen (2.3–3.9%), and only a small proportion (1.6–3.1%) reported that they did not plan to have children (See Table 5).

**Table 6:** Association between preferred number of children and field of study

Domain	Field of study	Number of Children					Total
		1	2	3	4 or more	I do not plan to have children	
Field of Study		<b>Sociology</b>					
	India	34.1%	58.5%	2.4%	2.4%	2.4%	100.0%
	SL	11%	65%	19%	1%	4%	100.0%
		<b>BBA / Management</b>					
	India	34.4%	57.8%	3.9%	2.3%	1.6%	100.0%
	SL	10%	56%	20%	6%	8%	100.0%
		<b>Computer Science / Science</b>					
	India	23.1%	70.8%	3.1%	.0%	3.1%	100.0%
	SL	11%	45%	28%	3%	13%	100.0%

Source: Survey data (2025)

Notably, in both Sri Lanka and India, a small but significant group of students expressed alternative visions of motherhood. Some were interested in non-biological caregiving through adoption, fostering, or caring for animals. One Sri Lankan participant shared,

*“I would really love to be a mother too, not to human children, but to dogs and other animals.”* (In-depth Interview, 2025)

Others challenged the glorification of biological motherhood, asserting that love and care are not dependent on genetic ties. These perspectives highlight a growing diversity in how young women envision their futures, challenging the notion that motherhood must follow a culturally prescribed path. They reflect an important generational shift in reproductive values, where motherhood is increasingly regarded as one of many possible life choices.

## **Discussion**

The results of this comparative study of female undergraduates from Sri Lanka and India show how conceptions of motherhood and fertility drop are shaped by a complicated interaction between growing individualistic values and old pronatalist norms. Although there is concern about decreased fertility in both situations, the extent and type of this concern differ depending on the academic field, the country, and the individual's goals.

Concern over decreasing birth rates was moderate to high among students in both Sri Lanka and India, with slightly greater levels of concern among Indian students. According to the findings in Sri Lanka, there was a relationship between concern levels and academic discipline, with Arts students demonstrating higher levels of concern. This aligns with previous research, which shows that fields focusing on demographic and social issues tend to foster greater awareness of population patterns and their socioeconomic implications (De Silva, 1997). The lack of concern among science students might be the result of a more data-driven, detached perspective or a lack of exposure to the sociocultural effects of demographic change. Besides, these findings echo global patterns where fertility awareness is often stratified by education type, with social science and humanities students more likely to contextualize demographic shifts in broader societal debates (Park, 2005).

In both countries, delaying motherhood was primarily motivated by factors such as education, professional growth, and financial freedom. These goals are in line with broader global trends that have been observed in Western cultures, where women's improved access to higher education, career possibilities, and reproductive autonomy are frequently associated with voluntary childlessness or delayed motherhood (Gillespie, 2003). The idea that parenting is a deliberate life choice rather than an unavoidable life stage

is reinforced by students' emphasis on personal autonomy, travel, and self-improvement. The demographic history of Sri Lanka must also be taken into consideration, as postponed marriage has been a major factor in the country's decades-long drop in fertility (De Silva, 1997). Students in both nations choose the 25–30 age range for childbirth, which is indicative of enduring cultural standards on biological "ideal" timing, even as a minority show openness to later or non-motherhood paths.

Views on the importance of motherhood differed greatly among females pursuing different academic disciplines. Arts students in Sri Lanka were more inclined to recognize its significance, frequently citing cultural and religious imperatives. Science students, on the other hand, tended to have more individualistic views, which aligned with Gillespie's (2003) remarks that rejecting motherhood can be part of a larger reinterpretation of femininity beyond traditional reproductive duties. The persistence of large percentages of students evaluating motherhood as "extremely important" demonstrates that pronatalist attitudes are still established in both societies. However, the growing minority who consider motherhood optional reflects developments in Western countries, where the "childfree" identity challenges normative links between femininity and motherhood (Gillespie, 2003; Park, 2005).

Students from many academic fields in India commonly mentioned a lack of paternal support as a major factor affecting their views on motherhood (Table 3). Given the importance of family support networks in influencing reproductive choices, the belief that fathers offer little help with child-rearing may delay motherhood and increase the allure of childfree lives or alternative caregiving practices.

The prevalence of students contemplating non-biological forms of caregiving, such as adoption, fostering, or animal care, indicates a diversity in how nurturing responsibilities are conceived. This is consistent with Park's (2005) findings, which show that deliberate childlessness is frequently presented not as a lack of caring, but as a shift in care toward non-traditional beneficiaries. Such perspectives question cultural scripts that link "real" parenting primarily to biological reproduction.

While Sri Lanka and India share many structural and cultural effects, such as marriage-centered fertility, economic pressures, and gendered expectations, India's slightly higher level of concern may be due to increased public discourse on demographic changes or different policy framing. However, in both circumstances, young women's reproductive plans are influenced by similar forces: the conflict between personal liberty and societal norms, economic insecurity, and the symbolic significance of motherhood.

## Conclusion

Findings reveal that while Sri Lankan and Indian female undergraduates share concerns about declining fertility, their views differ according to academic discipline. Moreover, individual choices and aspirations related to education, career goals, and financial security play a significant role in delaying motherhood. However, cultural norms still shape young women's preferred age for marriage (25-30 years) and preferred number of children (two children). It is also visible that a growing number of young women question the ideal type of biological motherhood; a pattern that reflects a shift towards more individualistic and diverse reproductive choices.

Therefore, policies aimed at addressing fertility decline in these contexts will need to reconcile pronatalist objectives with the aspirations of a generation redefining womanhood. Such policies may include supportive family measures such as affordable childcare, paternal leave, flexible work hours, and structured return-to-work schemes that enable women to re-enter the workforce once children reach a certain age. They should also provide tax concessions, salary benefits, and government subsidies for families with children, thereby reducing the economic burden of parenthood. In addition, policies must recognize diverse life paths, including childfree lifestyles, without stigma, and integrate demographic issues into education across disciplines to promote informed reproductive decision-making from an early age. Finally, beyond economic and institutional measures, policies should also emphasize familial factors, particularly paternal engagement, to make parenthood a more viable and supported choice for young women.

The findings of this comparative analysis reveal both convergence and divergence in how young women in Sri Lanka and India perceive motherhood and fertility decline. Overall, the results indicate that generational shifts toward individualism, education, and self-determination are reshaping traditional reproductive values, even as cultural expectations surrounding motherhood remain deeply rooted.

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## Job Redesign as a Strategy to Reduce Burnout Among Nurses: A Theoretical Perspective

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### Abstract

Burnout is a common phenomenon in many modern-day organizations. However, the literature shows that burnout is more pronounced in nurses than in other categories of healthcare workers. Unfortunately, there is a dearth of scholarly studies on how organization development interventions can help reduce burnout among nurses. The aim of this study hence, was to examine how job redesigns can be employed as organization development intervention strategies towards the reduction of burnout among nurses. The methodology adopted was conceptual analysis of key job design theories, which include the Sociotechnical Systems Theory, the Job Characteristics Model, the Job Demands-Resources (JD-R) Model, and the Job Demand-Control Model. From the study, job enrichment and job crafting as job redesign interventions have been identified as promising interventions that can subsequently be explored as dimension-specific initiator variables in empirical studies for evidence-based policy guidance and decision making.

**Keywords:** Job Design, Burnout, Job Characteristics, Job Crafting, Job Enrichment

### Introduction

Burnout is a common psychological occurrence in employees of many organizations, thus a phenomenon that has increasingly attracted the attention of scholars and policy makers (Wang, Wang, Han, Ye, Pan & Zhu, 2024;

Mudallal, Othman & Hassan, 2021; Jun, Ojemeni, Kalamani, Tong & Crecelius, 2017). The term burnout with reference to employees in organizations was first used by Freudenberger (1974), but Maslach (1981) is credited with having refined and furthered its conceptualization by delimiting its definition to imply a decline in physical, emotional, and psychological energy resulting from work-related stress, a definition that has continually been adopted by the research community (Jun et al., 2017).

Nurses are generally more susceptible to burnout relative to other populations of healthcare workers (Galanis, Moisoglou, Katsiroumpa, Vraka, Siskou, Konstantakopoulou, Meimeti & Kaitelidou, 2023; Maslach, 2003). The elevated cases of burnout in nurses have been attributed to various causes, including poor staff management, inadequate resources, lack of support, and lack of wellness programmes in the workplace (Ashipala & Nghole, 2022). Olaosebikan and Akinade (2022) also highlighted that increased workload, poor remuneration, poor working relationships with colleagues, work-life imbalance, and hospital settings are other predictors of burnout among nurses. Demographic variables such as age, gender, marital status, and having children have also been argued to contribute to burnout experiences in nurses (Cañadas-De la Fuente et al., 2015).

Some of the effects of burnout in nurses include emotional exhaustion, lack of personal fulfillment, and depersonalization (Richemond, Needham, & Jean, 2022), increased absenteeism, intentions to leave, and high turnover rates (Meng et al., 2015), and worse off, poorer quality of care through medication errors and high patient infection rates (Nantsupawat, Nantsupawat, Kunaviktikul, Turale, & Poghosyan, 2016). The World Health Organization (2019) additionally indicates that individuals experiencing burnout feel cynical about their job and are less capable of performing their job-related duties.

Researchers have proposed various strategies to address the issue of burnout among nurses. For instance, Chang and Chan (2015) argue that increasing nurses' optimism can lead to higher coping mechanisms for burnout. The use of physical humor in the workplace has also been advanced as a way of helping nurses cope with burnout (Wanzer et al., 2005). Emotion regulation, where nurses genuinely express emotion vis-à-vis suppressing emotion in response to an adverse event, has also been fronted as a coping mechanism for burnout in nurses (Goussinsky & Livne, 2016).

### **Problem Statement**

Empirical studies suggest that as high as 30-50% of nurses can reach clinical levels of burnout (Cañadas-De la Fuente et al., 2015; Jesse, Abouljoud, Hogan & Eshelman, 2015). The negative effects of burnout, with high prevalence rates among nurses, make managing burnout essential if safe

care environments and better outcomes for patients are to be attained (Galanis et al., 2021). Additionally, given that causal variables of burnout are numerous and not isolated, making it a complex phenomenon with manifold dimensions (Duquette, Kérowc, Sandhu & Beaudet, 1994), exploration of inventive ways of tackling burnout in nurses continues to be a priority in organizational studies. There is a dearth of literature on preemptive organization development interventions that can be undertaken to help reduce or manage cases of burnout in nurses. Therefore, we are motivated to probe, through a research agenda, the question of whether job redesigns can be an avenue for ameliorating the concern of burnout in nurses.

## **Methodology**

This study adopts a conceptual review approach, synthesizing existing literature on job design theories and burnout in nursing to propose a theoretical framework for future empirical testing.

## **Job Designs: A Review**

While it is generally agreed that the primary objective of effective job design is to have jobs contribute to the achievement of key organizational outcomes as well as individual outcomes such as enhanced employee motivation and job satisfaction, there is no universally accepted definition of what job design constitutes. Norris and Porter (2012) view it as the division of job tasks allocated to an individual in an organization, specifying what the employee does, how they do it, and why they do it. Armstrong (2009), on the other hand, views job design as the process of defining the contents of a job in terms of its duties, responsibilities, methods, techniques, systems, and procedures, with clarity on the relationships that should exist between a job holder, superiors, and subordinates. Oldham (1996) posited that job design encompasses the content and structure of the jobs that employees perform.

Morgeson and Humphrey (2008) accentuate why continued focus on job designs should be a central endeavor for organization theorists and practitioners. Foremost, they indicate that work is a vital part of life for both individuals and society, given that a vast number of employees will characteristically spend half their waking lives working, with the outcome of the work done having a direct or indirect impact on society. This is especially true for nurses. Second, Morgeson and Humphrey (2008) highlight that organizations keep operating in dynamic environments, necessitating the continuous review of strategies and structures, and job designs to support organizational evolution. Third, they argue that job design is an area that managers, workers, and organizations can practically control, vis-à-vis other organizational aspects, such as culture and structure, thus implying that it is

an area that can be tweaked without significant organizational change management requirements.

However, contradictory findings on the effect of job design interventions on individual and organizational outcomes are common in the empirical literature (Pierce & Aguinis, 2013). Benefits accruing from a specific job design intervention could also have unintended negative and detrimental consequences for the organization in other areas (Campion, Mumford, Morgeson & Nahrgang, 2005). Morgeson and Humphrey (2008) nevertheless posit that the benefits of job design interventions can flow to the organization if desired outcomes, which could be attitudinal outcomes, behavioral outcomes, cognitive outcomes, well-being outcomes, or organization-wide outcomes, are clearly defined before the intended job design interventions are executed.

### **Job design as a causal variable for burnout in nurses**

Burnout is a phenomenon that occurs from a prolonged mismatch between an individual and some dimensions of work, the most prominent dimensions of work being excessive workload, lack of sufficient control over resources needed to accomplish a job, lack of adequate reward for a job done, lack of a sense of positive connections with colleagues, perceived lack of fairness in aspects such as workload and pay, and employees feeling constrained by their job to act against their own values (Maslach & Leiter, 2016; Maslach, Schaufeli, & Leiter, 2001; Maslach, 1999).

The highlighted job dimensions have been explored as causal variables for burnout in employees, with empirical studies establishing inconsistent results. In the case of nurses, however, there have been conclusive results indicating that the bigger the nurse's workload, the higher the likelihood of burnout (Hunsaker, Chen, Maughan & Heaston, 2015). On the other hand, having higher schedule flexibility has been established to lower the prospects of burnout in nurses (Dhaini, Denhaerynck, Bachnick, Schwendimann, Schubert, & De Geest et al., 2018). Studies on lack of sufficient control over resources needed to accomplish a job, on the other hand, established that intrinsic aspects of a job, such as role conflict, autonomy, and task variety, can have a positive association with some burnout dimensions in nurses (Chiara, Jane, Reinius & Griffiths, 2020).

### **Job Design Theories**

Throughout the history of work, attempts have been made to improve work designs, with successive generations of scholars attempting to build knowledge from a hitherto existing knowledge base, leading to the crystallization of views into what are now widely accepted job design theories. Some of the most celebrated theories in job design include the Sociotechnical

Systems Theory (Trist & Bamforth, 1951), Job Characteristics Model (Hackman & Oldham, 1980), Job Demands-Resources (JD-R) Model, and Job Demand-Control Model (Karasek,1979).

### **A. Sociotechnical Systems Theory**

The sociotechnical systems theory was first theorized by Eric Trist and his colleagues at the Tavistock Institute for Human Relations in London, who built on the General Systems Theory by Von Bertalanffy (1950) by abstracting such systems from three dimensions: socio-psychological, technological, and economic (Trist, Higgin, Murray & Pollock, 2016). In their abstraction, the socio-psychological dimension referred to people, denoting the human aspects; the technological dimension referred to artifacts or things; and the economic dimension expressed the effectiveness of interactions between the human and the technological (Trist et al., 2016).

Abbas and Michael (2025) opine that subsequent revisions of the sociotechnical systems theory have refined the abstraction of the initial dimensions to suggest that in an organizational setting, the social subsystem represents the individuals that constitute an organization, together with their relationships, values, work structures, work-related elements and work-related associations. Abbas and Michael (2025) additionally highlight that streams of thought on the sociotechnical dimensions have evolved to view the technical subsystem in an organization as well as include physical and material flows within a transformation process together with the tools, techniques, skillsets and devices required by workers to perform their duties, as they drive organizational objectives.

Mumford (2003;2000) underscores that sociotechnical designs ought to include, among others, diagnosis of needs, gauging job satisfaction levels, and gauging efficiency levels, and by this means determining the nature of any future design alternatives. These, whilst noting the ever-evolving nature of the understanding of sociotechnical systems (Davis, Challenger, Jayewardene & Clegg, 2014), if properly appropriated, enable the sociotechnical systems theory to continue to have wide applicability in organizational and management studies (Morris, 2009).

### **B. Job Characteristics Model**

The Job Characteristics Model, first propounded by Hackman and Oldham (1976;1980), seeks to explain and predict the relationship between job characteristics and individual responses to work. The general view of the theory is that there are five job dimensions that elicit three psychological states that could potentially be beneficial to both personal and organizational outcomes (Siruri and Cheche, 2021). The five job dimensions are skill variety, task significance, task identity, autonomy, and feedback, while the three

psychological states are experienced meaningfulness of work, experienced responsibility for the outcome of work, and knowledge of the actual results of work activities (Hackman & Oldham, 1980).

Task significance refers to the degree to which a job has a substantial impact on the lives or work of other people, irrespective of whether they are in the immediate organization or in its external environment (Hackman & Oldham, 1980). Skill variety, on the other hand, relates to the extent to which a given job requires the application of a variety of skills and talents to execute (Li et al., 2020). Task identity refers to the degree to which a job can be done from start to finish with visible outcomes (Nyabundi & Kagiri, 2016), while task autonomy relates to the extent to which an employee has freedom and discretion in decision-making regarding their work activities (2015). Finally, feedback relates to the extent to which an employee obtains direct and clear information about the effectiveness of their performance of their job (Boonzaier, Ficker & Rust, 2001). A diagrammatic illustration of the highlights of the job characteristics model is presented in Figure 1 below.

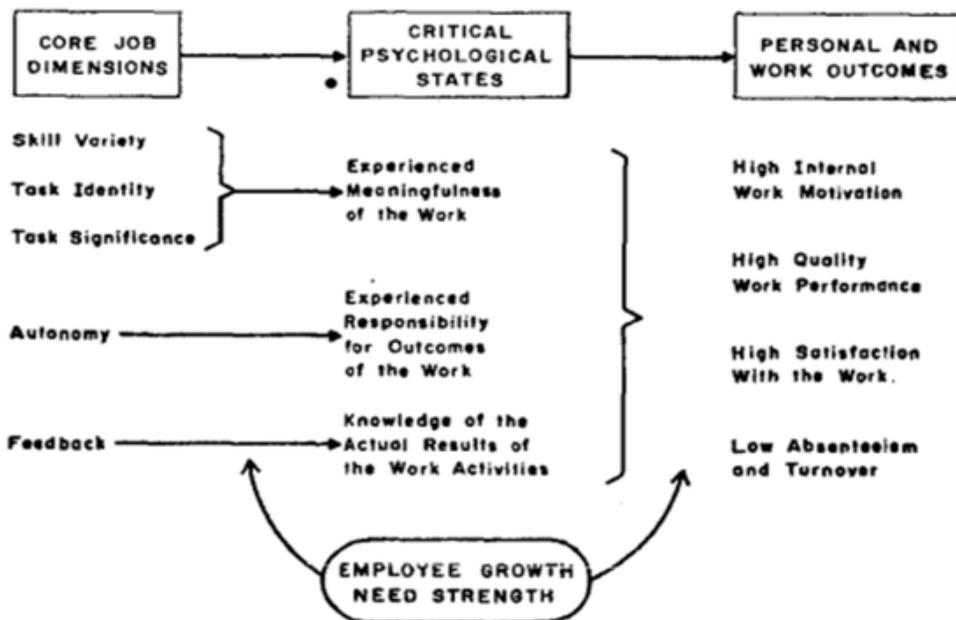


Figure 1: Job Characteristics Model (Hackman and Oldham, 1980)

Given that nursing is a specialized field and that job outcomes are contingent on multidisciplinary efforts, some dimensions of the job characteristics model, such as task autonomy, may not be fully applicable in the design of nursing jobs. Nevertheless, research on the job characteristics model has continually offered insights into the effects, relational mechanisms, and boundary conditions of some of the job dimensions, thus offering

noteworthy guidance for theory, research, and practice on job designs (Grant, 2008) and may correspondingly be useful in studies seeking to reduce instances of burnout in nurses.

### C. Job Demands-Resources (JD-R) Model

The Job Demands-Resources (JD-R) Model was developed by Bakker and Demerouti, and its key points are that every occupation has work-related characteristics that can be broadly categorized into two categories: job demands and job resources (Bakker & Demerouti, 2007). Job demands refer to the physical, psychological, social, or organizational aspects of a job that require sustained physical or mental effort, whereas job resources refer to the aspects of a job that are critical in achieving work-related goals by reducing job demands, reducing the consequences of job demands, and stimulating personal growth and development (Daniel & Lisa, 2021). A diagrammatic illustration of the surmises of the model is presented in Figure 2 below.

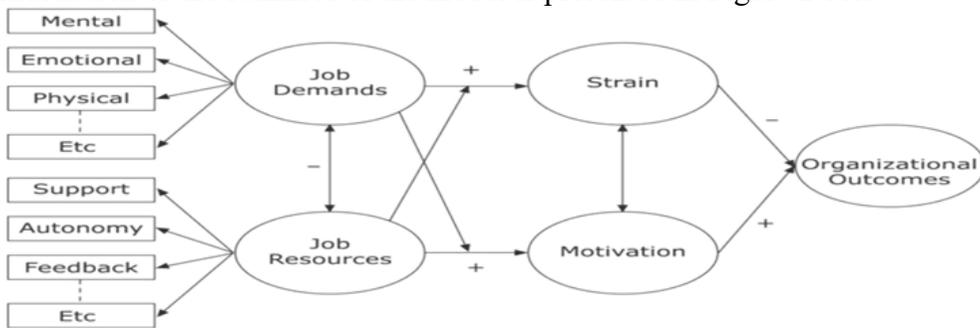


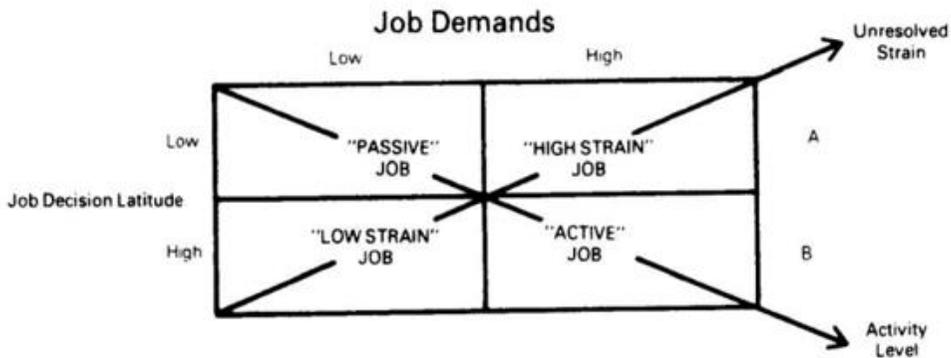
Figure 2: The Job Demands-Resources model (Bakker & Demerouti, 2007)

In nursing circles, the model has been tested empirically, and results have established the hunch that job demands and job resources have predictive ability on individual nurse performance outcomes such as burnout experiences, mental health, and turnover intentions (Spence, Heather, Grau, Joan, Wilk, & Piotr, 2012), as well as on hospital-specific outcomes such as work-life conflict and organizational care (Castner, 2017). Consequently, we believe that the model can provide an all-embracing framework for the contextualization of studies on burnout experiences in nurses.

### D. Job-Demand-Control Model

This model was introduced by Robert Karasek, who sought to outline the impact of adverse job characteristics on health and well-being (Karasek, 1979). According to the model, the negative consequences of work are attributable to two dimensions of a job: job demands and job control. Job demands refer to quantitative aspects such as workload, time pressure, and emotional demands, whereas job control, also referred to as decision latitude,

refers to the extent to which a job holder can control their job tasks and general work activity (Häusser, Mojzisch, Niesel, & Schulz-Hardt, 2010). Combining the two dimensions of job demands and job control, Karasek (1979) argued that jobs that are high on demands and low on control are high-strain jobs and bear the highest risk of negative outcomes for the jobholder, while jobs low on demands and high on control are low-strain jobs, hence have little likelihood of having adverse outcomes for the jobholder. A diagrammatic illustration of the model is presented in Figure 3 below.



**Figures 3:** Job Demand-Control Model (Karasek, 1979)

Johnson and Hall (1988) subsequently built on the arguments of the model by Karasek (1979) and proposed the addition of social support as a third dimension, positing that negative psychological outcomes for a job holder are expected when employees are in jobs that are characterized by high job demands, low job control, and low social support. Multiple research studies have subsequently established the legitimacy of both the Job Demand-Control and the Job Demand-Control-Support Models, making them one of the most dominant theories seeking to study the improvement of employee psychological well-being at the workplace.

### **How Job Redesign Can Help Address Burnout in Nurses**

From the literature, it can be construed that job redesign interventions can potentially offer a pathway to address concerns regarding employees' psychological well-being at the workplace, including tackling the challenge of burnout among nurses. Through ideation, we propose that job redesigns can help manage burnout experiences in nurses through the appropriation of job enrichment and job crafting interventions.

## **Job Enrichment**

Job enrichment is a job redesign strategy where an employee is assigned more responsibilities and duties to make their work more challenging and rewarding (Salau, Adeniji & Oyewunmi, 2014), inspiring workers to fully utilize their skills and abilities in task performance (Marta, Supartha, Dewi & Wibawa, 2021). From empirical studies, job enrichment has multiple benefits for organizations, including enhanced employee motivation (Tumi, Hasan & Khalid, 2021), loyalty (Niehoff, Moorman, Blakely & Fuller, 2001), organizational performance (Ada & Daniel, 2020), and reduced employee burnout (Cunningham, 1983).

Based on the job demands-resources and job demand-control models, job enrichment interventions should incorporate elements that facilitate job resources (Bakker & Demerouti, 2007) and enable high control (Karasek, 1979). Through this, several predictors of burnout are likely to be ameliorated, thereby enhancing job satisfaction and better organizational outcomes.

Practical instances of job enrichment interventions in nursing practice could entail allowing nurses to engage in activities that add value to patient care but do not affect their primary caregiving role. For example, nurses who have a passion for cookery can be allowed to participate in making diet plans with nutritionists, and, where possible, making patient meals, increasing nurses' skill variety experiences and task significance, thereby enriching their jobs. Another example of a job enrichment intervention is allowing nurses to oversee the design or maintenance of therapeutic gardens, which could then lead to enhanced task identity and the additional benefit of enhancing work-related associations, thereby improving organizational work climates and lowering burnout experiences.

## **Job Crafting**

Job crafting is a bottom-up job redesign strategy in which employees undertake self-initiated changes to align their jobs with their strengths, passions, and values (Wrzesniewski, LoBuglio, Dutton, & Berg, 2013; Kooij, van Woerkom, Wilkenloh, Dorenbosch, & Denissen, 2017), enabling them to better optimize job resources in the context of high job demands (Tims & Bakker, 2010). Bakker and Demerouti (2016) argue that job crafting by employees is important because it helps cultivate an environment that fosters person-job fit, which in turn can help manage burnout in employees (Zeng & Hu, 2024).

As a proactive form of work redesign by employees geared towards changing the characteristics of their jobs with the intent of decreasing hindering job demands, it can be undertaken with or without management consent and cooperation (Cort, Ian, Kristi & Zacher, 2017), making it a powerful employee engagement avenue for organizations. When properly

undertaken, job crafting enables employees to change the way they see their jobs, giving them a sense of enhanced control over the tasks they perform (Wrzesniewski & Dutton, 2001), hence reducing instances of burnout.

In the literature, job crafting is depicted to have three different typologies: task crafting, relational crafting, and cognitive crafting (Li, Yang, Weng, & Zhu, 2021). Task crafting relates to shaping or molding one's role; relational crafting refers to reshaping the nature of the interactions employees have with others (Berg & Wrzesniewski, 2013); and cognitive crafting relates to how employees change their mindsets about their assigned tasks (Tims & Bakker, 2010). In implementation, job crafting can be collaborative crafting, where employees work together to review the work process, or individual crafting, where employees actively but singularly alter the boundaries of their tasks (Cheng, Chen, Teng & Yen, 2016).

In nursing practice, studies show that job crafting is positively associated with nurses' well-being, motivation, happiness, and the resulting quality of care (Rodríguez-García, Ramos-Martínez & Cruz-Cobo, 2024). Given that nurses are more cognizant of the tools, techniques, and skillsets within their possession, they should be allowed to undertake job crafting by designing their jobs and work environments (Michael, 2025), which will then lead to tackling the challenge of high demands and low control in their jobs, thereby reducing burnout experiences. Given the sensitivity surrounding nursing ecology and the profession, collaborative job crafting should be preferred over individual job crafting (Topa & Aranda-Carmena, 2022).

## **Summary and Conclusions**

Several empirical studies indicate that adverse job characteristics, such as high workload, long shifts, and low job control, among others, can lead to burnout in nurses, thus registering higher instances of burnout relative to other populations of healthcare workers. In this article, we review the theoretical underpinnings of job redesign approaches and argue that job enrichment and job crafting hold the potential to address concerns of burnout in nurses, a position that has practical implications in the practice of human resource management and organization development as a discipline.

Given that the propositions herein are premised on conceptual and theoretical persuasions, job enrichment and job crafting should only be considered as probable dimension-specific initiator variables that ought to be further explored in empirical studies for evidence-based policy guidance and decision making. Such empirical studies should use appropriate individual participant data meta-analysis, as this method produces evidence by collecting and reanalyzing raw data from individual participants across multiple studies, thus providing a more consistent and reliable synthesis of evidence compared to traditional aggregate data methods.

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## Georgia's Path to Europe: A Corpus-Assisted Discourse Study of Presidential and Prime-Ministerial Speeches

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### Abstract

Social and political phenomena come into existence through a discursive dimension. The linguistic construction of reality is pervasive and plays a predetermining role in shaping social and political environment. The present study applies the framework of Corpus-Assisted Discourse Studies (CADS) to explore how Georgia's two political figures – former President Salome Zourabichvili and former Prime Minister Irakli Garibashvili – discursively represent Georgia's path toward European Union accession. The research examines 97 speeches (69 presidential/28 prime-ministerial) delivered between March 2022 and December 2023, totaling 64,321 and 29,559 tokens, respectively. Quantitative analyses were conducted using #LancsBox ® to identify keyword frequencies, collocates, and statistically significant differences, while Wmatrix5 ® was employed for semantic-domain and stance-related analysis. The findings reveal that both politicians tend to frame Georgia's European trajectory through recurring metaphors of *journey* and *family*, yet their linguistic emphases diverge: Salome Zourabichvili's discourse stresses European values, moral obligation, and collective unity, whereas the Prime Minister foregrounds national sovereignty, economic progress, and pragmatic governance. Despite differing communicative styles, both leaders converge in portraying EU integration as Georgia's shared national destiny.

**Keywords:** EU accession, corpus linguistics, political discourse, discourse analysis, CADS

## Introduction

The political discourse encompassing Georgia's European Union (EU) accession has gained noteworthy attention. Special emphasis could be placed on the recent development such as European Commission's recommendation to grant Georgia a candidate status in December 2023. The potential of Georgia to become a member of EU may reflect broader geopolitical shifts in the region and represents an essential object of scrutiny from a variety of perspectives. The discourse analysis of this crucial topic is a timely and relevant endeavor, as Georgia's European aspirations get intertwined with ongoing political discussions and issues of national identity within the scope of Eastern European integration. By linguistic examination of Georgian political leaders' verbal repertoires, it would be possible to understand how the politicians frame the process in the ongoing polarized contexts.

The EU accession of Georgia as a political process officially gained momentum on March 3, 2022<sup>1</sup>. Therefore, this paper offers a way to better understand the discursive construction of the aforementioned political phenomena in the speeches and addresses of the president and the prime minister, who have recently accused each other of political irrelevance. Language, as the primary means of meaning-making, reflects our conceptual system and the way we perceive the world (Lakoff & Johnson, 2003; Langacker, 1987). By studying the language applied in specific contexts to make sense of reality, the cognitive basis of complex abstract conceptions can be revealed. Bearing this in mind, the present research adopts a corpus linguistic, discourse-based "mixed-methods approach" (Brown & Mondon, 2021, p. 3), referred to as corpus-assisted discourse studies (CADS). The combination of CDS (Critical Discourse Studies) and DS (Discourse Studies) with CL (Corpus Linguistics) has been highlighted as "a mutually beneficial fusion" (Nikisianis et al., 2019, p. 280; Brown & Mondon, 2021, p. 4). Moreover, the corpus-based analysis (Baker, 2006; Tognini-Bonelli, 2001) employed in this study is based on two corpora, which serve as evidence to either support or challenge understandings regarding the discursive formation of political positions and stances in relation to EU integration. Furthermore, applying CADS to this case is a novel endeavor in the context of research conducted within the Georgian sociolinguistic milieu.

The linguistic analysis in this paper focuses on how the president, Salome Zourabichvili, and the former prime minister of Georgia, Irakli

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<sup>1</sup> The Georgian Dream government has put a stop to it in November 2024 due to certain political processes.

Garibashvili (PM), perceive and discursively represent their stances on the country's EU integration. More precisely, the present paper attempts to answer the question of whether these political figures discursively construct similar or varied views on the current political phenomenon. The linguistic studies being performed for this research embrace *lexicometric* analysis (i.e., analysis of the lexical frequencies of keywords in context) along with *textometric* analysis (i.e., a computer-assisted textual analysis that links statistical processing of lexical items with the contextual specificities). In the first place, the focus is placed on the lexical discrepancies between the president and the prime minister's speeches; the lexical frequencies were processed via the software tool #LancsBox®: Essential keywords, individual and shared collocates for the keywords *Europe*, *European*, and *EU* were identified and compared.

Then, a more qualitative approach was carried out by focusing on the semantic domains (also known as notional domains) that are prevalent in the Salome Zourabichvili and Irakli Garibashvili corpora. For the qualitative scrutiny of the discourse Wmatrix5® with integrated Semantic Analysis System - UCREL was employed. The current study addresses the following research questions:

1. What do the keywords reveal about the politicians' attitudes towards EU accession?
2. From a linguistic perspective, do frequently used semantic domains in the Presidential and Prime Ministerial speeches constitute different narratives?
3. How do *lexicometric* and *textometric* analyses relate to the political stance taking in the politicians' speeches/addresses?

By analyzing how the politicians picture Georgia's unity with the European Union through the language they use, the paper attempts to uncover how their discursive visualizations may differ and how potential discrepancies may be concomitant to their individual standpoints. Therefore, addressing the above-mentioned research questions promotes the pervasiveness of the essential 'how' of discourse analysis (Mautner, 2019, p.10).

## Literature Review

In recent years, discourses of European political issues and polarizing matters have been extensively investigated by Corpus-Assisted Discourse Studies (CADS). Since CADS methodology integrates quantitative corpus linguistic techniques with qualitative discourse analysis, it has been widely applied to explore how political actors frame a variety of controversial topics such as European integration, national identity, and sovereignty.

Wodak et al (2009) examine discourse of EU institutions highlighting how language can construct a unified European identity in the context of enlargement policies. Similarly, Baker (2010) applies CADS to the issue of

Euroscepticism in the UK. Thus, he reveals that pro-EU and Eurosceptic rhetoric strategically construct opposing stances on sovereignty and integration. The discourse analysis of the above-mentioned cases identifies duality, which is pertinent to the EU-related debates.

Another topic is migration within the EU. Fitzgerald's (2014) application of CADS to British political parties' rhetoric has revealed that framing of migration could have a dichotomic representation seen as either a threat to national identity or an economic benefit. Furthermore, Kolb's (2018) analysis of Eastern European political discourses highlight how political elites find the balance between economic gains and possible threats to sovereignty of the country.

In a broader context of polarizing political issues, Richardson (2006) demonstrates how discourses of *the War on Terror* in the US and UK construct "us" (the West) vs. "them" (terrorists) dichotomy via language justifying political decisions and military interventions. As it appears, divisive rhetoric can legitimize political stances. Finally, polarized rhetorical strategies identified in the parliamentary discourse on EU policies (Nelson, 2016) reflect tensions between unity and autonomy, a dynamic that can also be observed in Georgian political discourse.

Recent research shows a growing application of CADS to political and media communication in Eastern Europe. For instance, Tomczak-Boczko (2023) analyses Polish political rhetoric, revealing how moral and evaluative frames construct partisan identity, while Zawadzka-Palucktau (2023) and Kosman (2024) apply CADS to Polish media texts on migration and the Belarusian border crisis, which exposes contrasting humanitarian and security narratives. Beyond Poland, Kryvenko (2025) compares Ukrainian and British parliamentary debates to map framing strategies of Russia's aggression. Hayes and Poole (2022) demonstrates diachronic semantic-domain analysis of political debates, while Glaas (2022) outlines a comprehensive CADS framework with the combination of collocational and discourse-pragmatic tools. Despite this regional expansion, no research to date has applied corpus-assisted discourse methods to Georgian political discourse, which makes the present study a timely contribution.

### ***Brief Historical Background on the EU accession and the Political Friction between President and Prime Minister***

The accession of Georgia to the European Union is officially regarded as a current agenda for the EU enlargement. Georgia applied for the EU membership in March 2022, which was followed by the EU acknowledgment to view the country as an eligible candidate for becoming a member of the Union. November 8, 2023, marks the day of an official recommendation issued by the European Commission to grant a candidate status to Georgia,

which was ratified on December 14, 2023. Georgia has become one of 9 current candidate countries together with Albania, Bosnia and Herzegovina, Moldova, Montenegro, North Macedonia, Serbia, Türkiye and Ukraine.

Nevertheless, the relations between Georgia and the European Union started in 1992 as a consequence of an agreement between the former European Community and the newly independent Georgia. In 2006 Georgia implemented a five-year “Action Plan” of rapprochement in the context of the European Neighborhood Policy (ENP), which was further upgraded in 2009 under the auspices of the Eastern Partnership. Comprehensive Association Agreement between the EU and Georgia in 2016 granted the country free visa travel to the EU. These political processes have been supported by the governing Georgian Dream and the main oppositional party United National Movement along with the other small parties, which are pro-western in orientation.

President Salome Zourabichvili is a French Georgian politician and former diplomat, who is currently serving as the fifth and the last popularly elected president of Georgia (President’s term ended in December 2024). She was endorsed by the ruling Georgian Dream party in the period of presidential campaign. Nevertheless, a political friction between Salome Zourabichvili and Georgian Dream was incited in 2023 due to the President’s travel to Europe, so as to hold meetings with the European leaders to lobby for Georgia’s EU candidacy despite not being granted with the authorization from the government to do so (Politico, 2023). Moreover, the president was accused of “strengthening the false campaign” inspired by the opposition party, United National Movement. In effect, the competition for the eligible European path is set in motion. We have seen a myriad of political evaluations and assessments. Hence, it would be interesting to scrutinize the discursive formation of the European path along with the politicians’ attitudes framed by the linguistic repertoire, which could be rendered as a novel endeavor of a linguistic scrutiny of the political discourse in Georgia.

### ***Modals and Stance Taking***

In this paper, stance is operationalized via *modal verbs* and *attitudinal language* that tend to reflect varying degrees of certainty and commitment to a position. For example, epistemic modals such as *will* indicate certainty, while modals such as *may* or *might* suggest uncertainty.

Attitudes, beliefs, or evaluations toward a particular event or proposition can be expressed by means of stance-taking modal auxiliaries, which can signal the speaker’s degree of certainty, obligation, necessity, or possibility (Biber et al., 1999). Therefore, modality is not simply a grammatical feature but an essential means of reflecting the speaker’s position in relation to the truth of a proposition or social dynamics ascribed to the interaction (Palmer, 2001).

Contextually, *epistemic modals* – such as *might*, *may*, *must*, *could*, and *will* – express certainty or uncertainty about the truth of a statement. For instance, the use of *must* signals an evidence or reasoning-based high level of certainty about the speaker's belief (Biber et al., 1999). Conversely, the modal verb *might*, reflects a lesser degree of certainty, implying uncertainty or openness to alternative possibilities. These epistemic modals make it possible for the speaker to adjust the degree of commitment in relation to the truth of their claims (Hunston and Thompson, 2000).

Central linguistic figures of social stance-taking are *deontic modals* (i.e., *must*, *should*) expressing obligation, permission, or necessity. The functional side of a modal verb *must*, conveys not only a strong obligation but also the speaker's authority or expectation regarding the listener's behavior (Palmer, 2001). Similarly, "*should*" reflects the speaker's evaluative stance via recommendation or advice on the behavior deemed appropriate or desirable. In this way, modals frame the interaction by signaling the speaker's views of necessity or permissibility of the actions, which can influence listener's response (Hunston and Thompson, 2000).

In comparison with the above-mentioned types of modalities, *root modality* (expressed by *can* and *could*) expresses ability or possibility by highlighting what could be possible or feasible within a given context (Biber et al., 1999). By this, the speaker can focus on the limits or potentials of a situation (Palmer, 2001).

The strategic use of modals is associated with negotiating power, persuasion, and agreement in the discourse. Thus, politicians are able to assert their positions of national importance by shifting their tone of communication from confidence and certainty to possibilities and imposing orders. Therefore, deontic, epistemic, and root modality are grammatical classifications of modal verbs based on their intrinsic features, while *attitudinal* and *affective stance-taking* characterize pragmatic roles played by the modal verbs in the process of expressing the speaker's evaluations or emotions.

*Attitudinal stance* conveys the speaker's judgmental view on desirability, necessity, or appropriateness of a communicative situation. For instance, interplay of *should* and *must* alter recommendation or expectation into strong obligation or necessity. *Affective stance*, on the other hand, underscores the speaker's emotional tone. Modals like *may* and *might* promote tentativeness and doubt, while "*would*" and "*will*" modal verbs could show willingness or hope (Palmer, 2001).

Apart from the above-mentioned stance taking strategies, there is *stylistic stance* as well which refers to the way an individual conveys their attitude, perspective or positioning through stylistic choices in communication. For example, adjectives could play an essential role in

expressing judgments or perspectives while adverbs could modify the intensity or certainty of these judgements (e.g. *absolutely brilliant*).

Overall, by analyzing the means of stance taking, we can gain insight into how politicians position themselves within the political discourse via applying modality or modal phrases to their speeches as an essential tool for shaping communication dynamics.

### **Corpora**

The present study gathers all the speeches/addresses from President and Prime Minister that are stored in English on the official websites <https://president.ge/index.php?m=206> and <https://garibashvili.ge/en/about>. The on-record speeches for the European audience are delivered and stored in English, while the speeches designed for the Georgian audience are officially translated by the presidential and prime minister communication services.

All the transcripts were retrieved from the official websites, and the two sets of corpora were compiled<sup>2</sup>: the Salome Zourabichvili Corpus (Corpus 1 - 69 speeches, 64 321 tokens) and the Irakli Garibashvili Corpus (Corpus 2 – 28 speeches, 29 559 tokens). Although these two sets of corpora are not of the same size, normalized absolute frequencies are used for the relevant statistical analysis.

Overall, the dataset for this study consists of 97 speeches delivered by President Salome Zourabichvili and former Prime Minister Irakli Garibashvili, obtained from official governmental websites between March 2022 and December 2023. Although the corpus is relatively small, it includes high relevance texts, which discursively frame Georgia's EU accession. The speeches under linguistic scrutiny feature a direct engagement with the European integration theme that renders the political narratives highly pertinent for the analysis. As the process of EU integration is underway, future studies could incorporate more extensive material to comprehensively investigate Georgia's EU journey.

### **Methodology**

The present study is contingent on a mixed-methods approach employing methods of corpus-assisted discourse studies (CADS). There have been numerous studies conducted on EU integration in different contexts. Nevertheless, applying a corpus-assisted discourse studies (CADS) approach to Georgia's political discourse is a novel endeavor, which offers a detailed

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<sup>2</sup> Report [#LancsBox] This research report was automatically produced by #LancsBox (Brezina et al., 2015, 2018, 2020), a corpus analysis tool developed at Lancaster University. It uses cutting-edge technology and statistical sophistication (Brezina 2018) to analyze and visualize corpus data. For more information and tips on research report writing see the Research Report Guide.

linguistic analysis of how Georgian political figures conceptualize the European path. The research explores and highlights nuanced differences in how EU accession is framed linguistically by focusing on key themes, such as national unity, European values, and political sovereignty. By applying both lexicometric and textometric analytical tools, the present paper appears to be a significant contribution to the field of political discourse studies, especially in the context of post-Soviet countries with aspirations to join EU.

The analysis of the corpora combines quantitative and qualitative approaches. #LancsBox® (Brezina et al., 2015, 2018, 2020) was used to conduct quantitative analysis with regard to identifying frequent keywords and collocates, while Wmatrix5® (Rayson, Archer & Wilson 2002, 2) facilitated semantic domain analysis. The duality of analytical approach ensures a comprehensive understanding of how key terms like *Georgia* and *EU* function within political discourse. The quantitative data serves as a starting point for close reading of concordance lines, where the contextual meaning of the terms in focus is examined. The differences are supposed to be reflected in the speech patterns of their idiolects.

Quantitative corpus analytic methods have made it possible to analyze large datasets, so as to identify patterns of language use that could not be detected via reading the textual data (Partington & Marchi, 2015; Baker, 2006; Partington, Duguid, & Taylor, 2013). Therefore, the use of corpus-analytic methods and tools led to a qualitative scrutiny of the relevant passages to gain more insightful understanding of the language patterns, which have been used in a certain context to accommodate language users' beliefs and behaviors (Lischinsky, 2018, 62).

The lexical analysis involved the elaboration of the keyword frequency lists. #LancsBox® software package was used to analyze the data. The tool of #LancsBox -*Words*, was used for in-depth analysis of frequencies of types, lemmas, and POS categories as well as comparison of corpora using the keywords technique. Keywords are characterized as lexical items that occur significantly more often in a given research corpus than in a referential wordlist. BE06 referential set of words/referential corpus (Baker 2009) was used for comparison, which is a balanced corpus (normalized to one million tokens) of modern British English compiled to represent contemporary written English usage. Log-likelihood (LL) values were calculated with a significance threshold of  $p < 0.05$ . For collocation analysis, GraphColl was applied with a window span of  $\pm 5$  words along with T-score analysis. Text preprocessing included the removal of duplicates, HTML artifacts, and metadata tags using regular expressions and manual verification. Stop-lists followed the default #LancsBox configuration, and lemmatization was performed automatically within Wmatrix5 for semantic tagging.

**Corpus 1** (the Salome Zourabichvili Corpus) is represented with the 50 most frequently used words (an output of #LancsBox®)<sup>3</sup> and **Corpus 2** (the Irakli Garibashvili Corpus) is represented also with the 50 most frequently used words (an output of #LancsBox®) (See Appendix). The keyword lists were filtered down to the 25 lexical types – *nouns, verbs, adjectives, modal verbs, and numerals*, as they are the major carriers of notions and concepts in the present study. As for the other frequently used words presented in the outputs such as articles, particles, prepositions, pronouns, and conjunctions, these were removed as they are not the carriers of thematic notions.

The next step focused on certain lexical items regarding the two corpora, more specifically Europe-related keywords - *Europe, European*, and *EU* as well as Georgia-related keywords – *Georgia, Georgian*. The software tool produced individual and shared collocates for the target lexical units.

For the qualitative *textometric* analysis, Semantic Domain Analyzer Wmatrix5® was used. It is developed by a group of researchers at Lancaster University and features a semantic tagger USAS, which groups together the words pertinent to the same semantic fields via pre-existing semantic categories that are integrated in the matrix (Table 1):

**Table 1.** Semantic fields of Wmatrix5®

<b>A</b> general and abstract terms	<b>B</b> the body and the individual	<b>C</b> arts and crafts	<b>E</b> Emotional actions, States and process
<b>F</b> Food and farming	<b>G</b> Government and public domain	<b>H</b> Architecture, buildings and housing	<b>I</b> Money and commerce in industry
<b>K</b> Entertainment, sports and games	<b>L</b> Life and living things	<b>M</b> Movement, location, transport and travel	<b>N</b> Numbers and measurements
<b>O</b> Substances, materials, objects and equipment	<b>P</b> Education	<b>Q</b> Linguistic actions, language and communication	<b>S</b> Social actions, states and processes
<b>T</b> Time	<b>W</b> World and environment	<b>X</b> Psychological actions, states and processes	<b>Y</b> Science and technology
<b>N</b> Names and grammar			

<sup>3</sup> These lists show all keywords identified in both corpora, including their statistical significance.

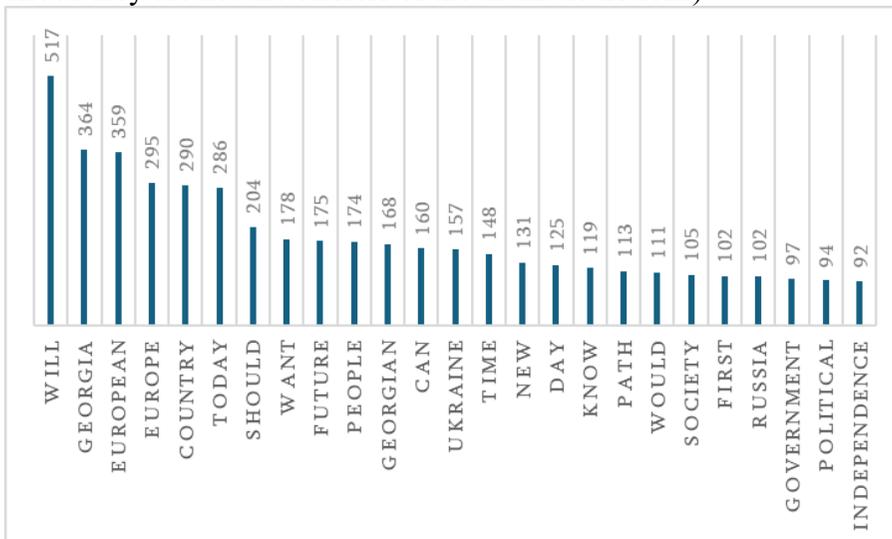
For transparency and replicability of the research, all the files of Corpus 1 and Corpus 2 have been published on Harvard Dataverse along with #LancsBox Report and Wmatrix outputs for Corpus 1 and Corpus 2 Semantic Domains Analysis (Anonymous, Anonymous 2024).

## Results and Discussion

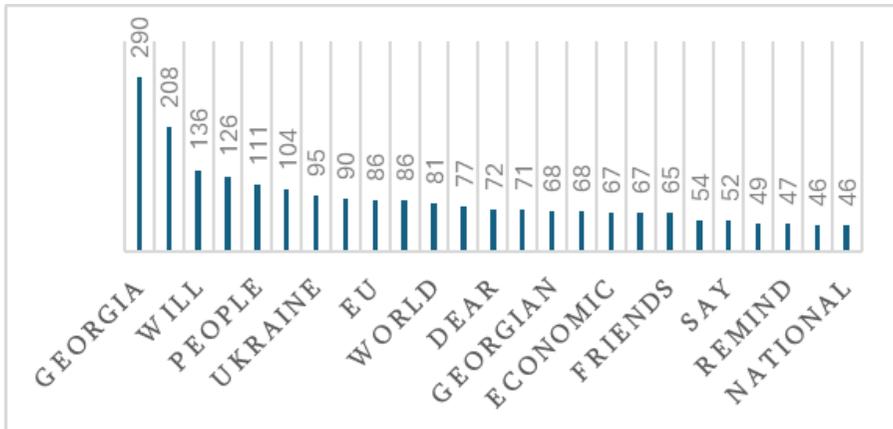
### *Lexical Frequencies*

To highlight the prominence of the lexical units used in speeches, the study explored the lexical frequencies of notional parts of speech. #LancsBox WORD function produced the keyword frequency lists (in reference to BE06 referential corpus), providing both absolute and relative frequencies. The latter is essential for the study, as the two corpora are not of the same size and the relative frequency represents normalized occurrences of the target words levelling each corpus to 1 000 000 tokens/word types.

Figures 1 and 2 below show the most frequent words for each corpus prepared on the basis of filtering the keywords down to the *twenty-five* most essential notional parts of speech along with *modal auxiliaries*, which tend to reveal speaker’s stances towards the specific events and phenomena (particles, articles, pronouns, conjunctions and other auxiliary verbs were excluded from the list as they are not the carriers of the thematic notions).



**Figure 1.** Absolute Keyword Frequency for the Salome Zourabichvili Corpus (Corpus 1)



**Figure 2.** Absolute Keyword Frequency for the Irakli Garibashvili Corpus (Corpus 2)

Interestingly, the most frequent word in the Salome Zourabichili Corpus is the modal auxiliary *will* expressing epistemic modality – certainty about the diplomatic actions, and a united plan of national accord. Excerpts (1) and (2) instantiate the recurrence of the target linguistic unit.

- 1) Still, I hope very much that our diplomacy **will** meet its standard and accomplish everything that this country needs. We all know that today, what this country needs the most is the path of Europe, to succeed on this European path.
- 2) It is necessary to prepare and present a united plan of national accord that **will** not be a subject to annulment.

Another modal (excerpt 3) in the president’s discourse “*can*” modal verb is used with the function of root modality, which highlights possibility /feasibility of the aspirations Georgia may have on its path to becoming a member state of EU.

- 3) We **can** see very well, and from the outside perspective, it **can** be seen even better, what Georgia wants, what its people want, what its society wants, and what its youth wants.

The second word in the frequency list of the President’s corpus is *Georgia*, which appears to be a leading one in the Irakli Garibashvili Corpus stressing the achievements of the country throughout the period of the Georgian Dream’s rule (excerpt 4). The PM’s 25 essential keywords also include modal auxiliaries *will* and *would* while discussing the polarization in the country in relation to the process of granting the status (excerpt 5) along with explaining the effect of economic sanctions against Russia (excerpt 6):

- 4) As for the fight against corruption, Trace International ranks **Georgia** among 20 Best Countries of Europe and 30 Best Countries of the World, being the first in a sub-component of Low-Risk Degree of Corruption in Dealing with Authorities. According to the Global

Corruption Index, **Georgia** advanced by nine position points in 2021 and was ranked 41<sup>st</sup> in the world. Our country is ahead of such member states of the EU and NATO as Slovakia, Croatia, Bulgaria, Hungary, Romania, North Macedonia, Montenegro, Albania, and Türkiye.

- 5) if Europe, MEPs and our European colleagues genuinely wish to see polarization ended in Georgia, they should grant us the status of an EU Candidate Country. It **will** remove all the questions and speculations. It **will** end their destructive and radical actions, and no real reason **will** remain for our extremist opposition to blame our governance for anything.
- 6) Against this background, you are especially well aware that imposition of sanctions at the national level, enforcement of national economic sanctions towards the Russian Federation **would** translate into sanctions being imposed on our own citizens there and into sanctioning our country. Thus, irrespective of our solidarity towards Ukraine, our partners, we said that we **would** be guided with our national interests only and nobody **will** ever make us change our decision as you may know.

Figure 3 below shows the overlapping keywords that the two corpora share. These words are *Georgia, Georgian, Europe, European, Country, People, Ukraine, Today, Government* and *will /would*. The president and the PM, both share the linguistic units that frame their attitudes towards the European vector. The keywords indicate the similar themes that are pertinent to their discourses: interest in the integration in the EU, people’s involvement, development of the country, government’s stability, and support for Ukraine, which is crucial in the current political turmoil.

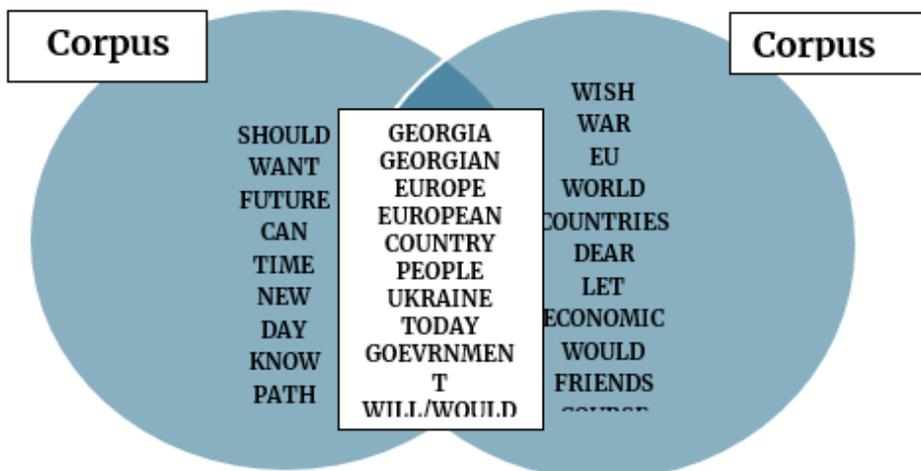


Figure 3. Shared Keywords between the two corpora

The keywords, such as *Georgia/n* and *Europe/an*, are essential to understanding how political figures frame the country's EU accession. For this reason, specific relative frequencies for Europe-related words were visualized in the diagrams below (Figure 4 and 5). The President uses the words *Europe* and *European* more often than the PM (Figure 4). General relative frequencies sum up the specific relative frequencies showing the prevalence of EU-related words in the President's discourse.

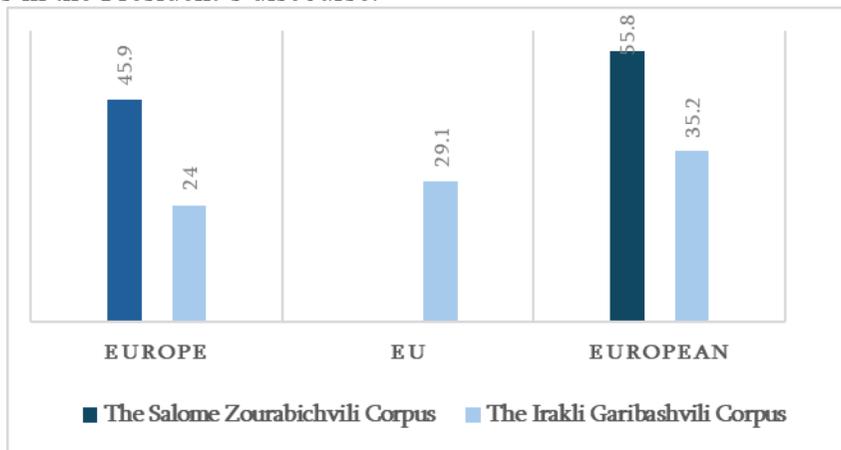


Figure 4. Specific Relative Frequencies for Europe-Related Words in both corpora

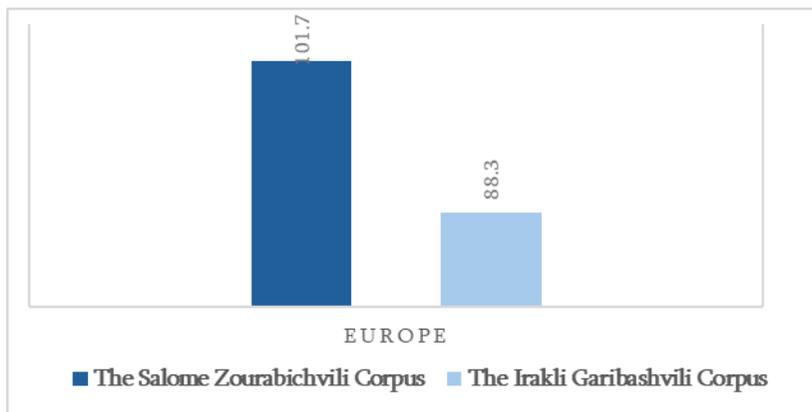


Figure 5. General Relative Frequencies for Europe-Related Words in both corpora

According to Figure 4, *EU* as a frequently used keyword appears only in Prime Minister's corpus, reflecting the political emphasis placed on EU membership. Interestingly, both politicians state the importance of shared European values. The PM stresses the historical connection between Europe and Georgia, which contributed to the establishment of shared European values (excerpt 7), while the president strives to promote the intrinsic reciprocity of Georgian and European values (excerpt 8):

- 7) **Georgian people** taking great pride in their ancient culture and history dating back thousands of years, have always been oriented towards Europe and remained loyal to its values. At the dawn of the 20<sup>th</sup> century, **Georgian** people created a most democratic, European state based on **European values**, while its essence and Constitution was compatible with current criteria of Europe with high precision.
- 8) We now just have to prove that we are driven today by our **Georgian values**, which are also **European values**. If we can prove that these **values are within us**, we will overcome the disappointment and 2023 will truly be the Year of Europe.

To identify whether the difference between the frequencies was statistically significant, a significance test was conducted via an online software developed by Lancaster University research group (Rayson & Garside, 2000). This software compares absolute frequencies of the target lexical units via indicating the sizes of the corpora to balance the data and calculate statistical significance. According to the test<sup>4</sup>, LL (Log-likelihood) = 3.79 i.e. *p value* is not less than 0.05, which means that the difference is not significant. From the discourse perspective, we cannot claim that the president's use of EU-related words is significantly different from the PM's discourse. Their aspiration to join the EU is discursively alike.

Figure 6 presents a comparison of the specific relative frequencies for Georgia-related words in both corpora. The diagram explicates the prevalence of the target lexical item in the Prime Minister's speeches. The general relative frequencies (Figure 7) summarize the prevalence of the target linguistic units in the MP's speech.

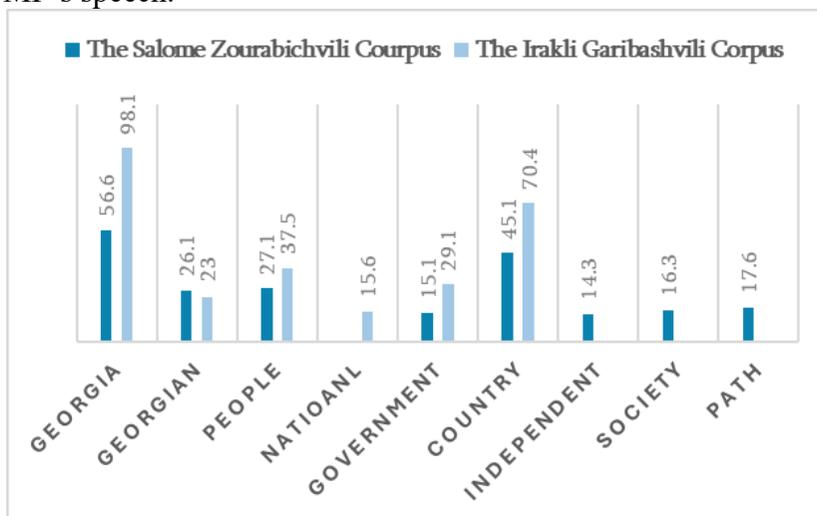
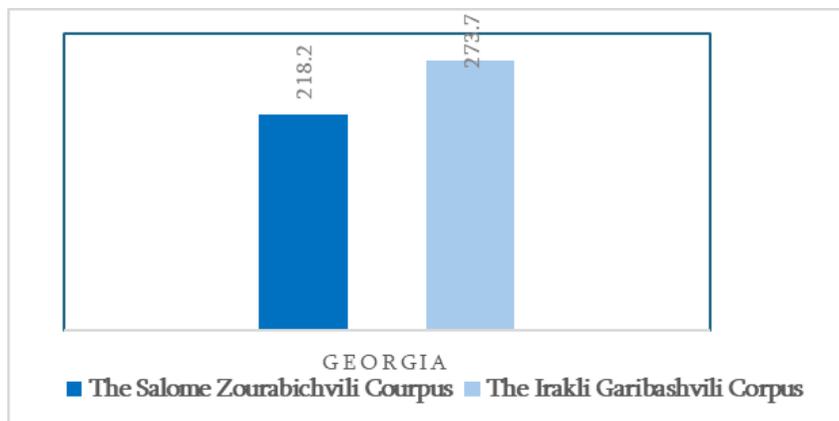


Figure 6. Specific Relative Frequencies for Georgia-Related Words in both corpora

<sup>4</sup> Log-likelihood calculator results:

<https://ucrel-api.lancaster.ac.uk/cgi-bin/llsimple.pl?f1=654&f2=261&t1=64.321&t2=29.559>



**Figure 7.** General Relative Frequencies for Georgia-Related Words in both corpora

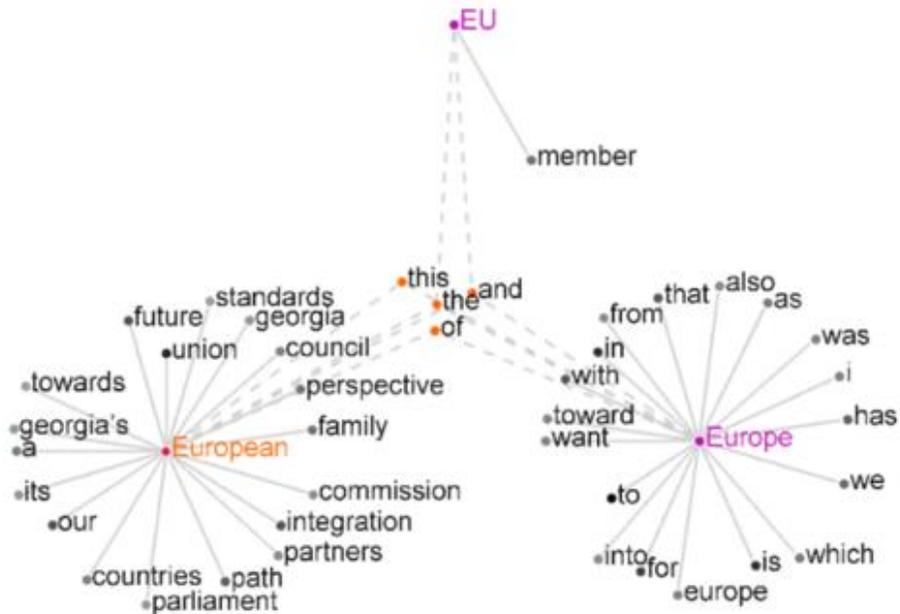
To substantiate whether the above-mentioned difference was significant, the test was run yielding the following result.<sup>5</sup>  $LL=25.85$  and  $p<0.05$ , which means that in this case the difference in use of the words related to *Georgia* is statistically significant. From a discourse perspective, the PM mentions Georgia in association with *Europe* expressively more than the President.

To go even deeper into the verbal repertoire of the politicians, the GraphColl tool in #LancsBox was applied to explore the collocates of *Europe*, *European* and *EU*. The integrated T-score statistical tool builds the visualization of the most frequent collocates, which could assemble a coherent ‘story’ or ‘narrative’ of a political figure in relation to the specific political occurrence. The narrative on its own can depict and discursively structure certain events from the perspective of a politician (Shenhav 2006). Studying collocates by means of corpus linguistic tools enables researchers to detect the meaning of the target words being developed in interaction with other ones. In other words, “you shall know a word by the company it keeps” (Firth 1957). Therefore, a T-score comes across as a statistical measure that indicates whether a word appears significantly more frequently in one corpus as opposed to a reference corpus. In the present study, LancsBox pairs T-score (statistic value is set at 5 in the parameters of LancsBox to ensure the significance) with the collocates of the target keywords. According to Figures 8 and 9, keywords *Europe* and *European* have more collocations in the President’s discourse, while the PM’s major collocates are linked with the keyword *EU* and *European*. Salome Zourabichvili’s narrative about the European path embraces the following collocates: *European: standards, perspective, family, commission, integration, partners, family, Georgia’s,*

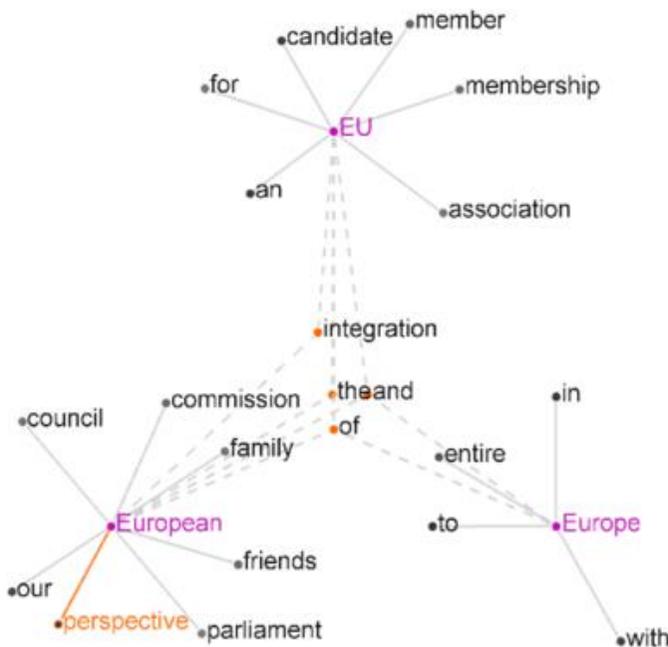
<sup>5</sup> Log-likelihood calculator results:

<http://ucrel-api.lancaster.ac.uk/cgi-bin/llsimple.pl?f1=1403&f2=809&t1=64.321&t2=29.559>

*union, council and countries.* The following collocates prevail in the PM's discourse: *European (EU): commission, council, family, friends, parliament, integration, association, perspective, candidate, and membership.*



**Figure 8.** T-score for EU-related Words in the Salome Zourabichvili Corpus (Corpus 1)



**Figure 9.** T-score for EU-related Words in the Irakli Garibashvili Corpus (Corpus 2)

The significant collocates of the keywords, such as *EU*, *European*, *Europe* in both corpora provide a useful insight into the political discourse of the political figures.

### ***Semantic Analysis***

A qualitative approach to discourse analysis can include the identification of the semantic domains. Therefore, to uncover the most recurrent semantic domains in the target corpora, the UCREL Semantic Analysis System (USAS), which is integrated in Wmatrix5® was used. The tagging procedure yielded the statistically more frequent semantic fields occurring across the data. The tagging procedure is accurate in terms of assigning certain codes to the linguistic units, which are available in the matrix. Table 2 below shows the distribution of 10 most significant semantic domains pertinent to the corpora (shared semantic domains are highlighted).

**Table 2.** Semantic domains across the two corpora

<b>Tag &amp; Frequencies</b>	<b>Salome Zourabichvili Semantic Domains – Corpus 1</b>	<b>Tag &amp; Frequencies</b>	<b>Irakli Garibashvili Semantic Domains – Corpus 2</b>
Z5 18758	Grammatical bin	Z5 8456	Grammatical bin
Z8 7473	Pronouns	Z8 2964	Pronouns
A3+ 2182	Existing	Z2 882	Geographical names
Z2 1585	Geographical names	G1.1 717	Government
M6 1518	Location and direction	A3+ 701	Existing
Z99 1034	Unmatched	Z99 570	Unmatched
G1.1 955	Government	A1.1.1 457	General actions / making
Z6 901	Negative	M6 382	Location and direction
T1.1.3 743	Time: Future	X7+ 367	Wanted
S5+ 740	Belonging to a group	Q2.2 333	Speech acts
S6+ 704	Strong obligation or necessity	M7 315	Places
A7+ 689	Likely	N1 305	Numbers
A1.1.1 665	General actions / making	S5+ 304	Belonging to a group
X7+ 616	Wanted	Z3 293	Other proper names
Q2.2 592	Speech acts	N5.1+ 254	Entire; maximum

The first striking observation with regard to the semantic domains is that *Pronouns*, *Existing*, *Geographical Names*, *Location and Direction*, *Government*, *belonging to a group*, *Speech acts*, and *General Actions* are the shared ones. Nevertheless, the president puts more emphasis on *Strong Obligation/necessity* or *Probability*, and *Future time*, while the PM accentuates *Places*, *Numbers*, and *Other Proper Names*.

The semantic domain of *Geographical Names* is the leading notional lexical/semantic field for both corpora. Given the context of the study, it is obvious that the discourse is rich in the linguistic units of this semantic domain. However, there is another factor to be considered – the context of use,

which accentuates the individual differences. *Corpus\_1*>Viewing Word-SEM frequency profile features 1585 hits of *Geographical Names* domain, out of which five most significant lemmas are GEORGIA (369), EUROPE (285), UKRAINE (161), RUSSIA (110), and BLACK SEA (23). As regards *Corpus\_2*>Viewing Word-SEM frequency profile, it features 882 hits of the same semantic domain, out of which the five most frequent occurrences are GEORGIA (281), UKRAINE (94), EUROPE (65), RUSSIA (35), FRANCE (14). The discursive use of *Geographical Names* is similar, for instance, in the excerpt below, President Zourabichvili stresses her personal endeavours to convince the European leaders in considering Georgia worthy of granting the candidacy.

*Location and Direction* semantic domain is particularly recurrent across the corpora. This domain includes prepositions such as *ahead, towards, forward, within*, as wells as verbs such as *stand, direct, lead, face, transfer*, and nouns such as *end, destination, course, direction, vector*, etc. The semantic load of this domain leads us to the conceptual metaphors (Lakoff and Johnson 1980) framing Georgia's EU accession as a journey. According to the conceptual metaphor theory, the semantic domain of *journey* is used to conceptualize an abstract notion of accession or political integration, which requires metaphoric framing to be digested mentally and apprehended more easily. Georgia's EU accession as a journey is evident in both corpora. The president's speeches feature considerable amount of journey metaphor:

- 9) Today, we **stand** together! We'll **stand** together tomorrow and **lead** our country into Europe. I make this promise to you as I made the same promise to myself a long time ago.
- 10) Let us all come to our senses, let 's get into this new time together and show the **country direction** and **path**.
- 11) Negotiation, which is **the way to direct and immediate accession**. I want to take advantage of today 's day and wish Ukraine victory because , without Ukraine's victory, there will be no progress and no freedom.

Prime Minister Garibashvili also frames Georgia's aspiration via *journey* metaphor. Therefore, the political process for the country to become a member of the EU is conceptualized by both politicians alike:

- 12) By granting the European Perspective to Georgia, every speculation and assumption of where Georgia **stands**, has vanished. Europe has vocally said that Georgia belongs to Europe, and the country will **accede to** the EU. **In this journey**, of course, the next stage is the status of an EU Candidate Country, which is a merely symbolic decision. Nevertheless, it is a significant one. That is why, our governance did everything **towards this end** and continued doing our best.

The third semantic domain to focus on is *General Actions*, which could lead to the conceptualization of the European path as a dynamic process, something evolving or developing. The USAS semantic tagger, the General Actions field, is defined as “general/abstract terms relating to an activity or action” (Rayson, Archer & Wilson 2002). From the perspective of cognitive grammar, energy and motion is realized through verbs that denote actions; hence they imply the dynamic of the circumstances (Langacker 1987). The lemmas that belong to this semantic domain are frequent occurrences in both corpora: MAKE, PROCESS, COMMISSION, COMMIT, CREATE, IMPLEMENT, ACT, ENGAGE, SPREAD, SAFEGUARD, PREPARE, etc.

The next semantic domain to consider is *Belonging to a Group*. In the President’s speeches the frequency of the lemmas residing within this domain is 740. The five most frequent lemmas from this semantic field are: SOCIETY, UNITY, TOGETHER, UNITED, and SOLIDARITY. For the Prime Minister the frequency of lemmas amounts to 304 with the five most reoccurring lemmas: PUBLIC, MEMBER, TOGETHER, TEAM, and SOCIETY.

As opposed to the President corpus, the PM’s discourse features the semantic domain of *Numbers*, which could be explained by his interest in financial and economic moments that a financially stable country would be more appealing to the European Union as a partner. The PM often stresses the importance of the economic growth Georgia has had for the past few years.

Out of the 15 most reoccurring semantic domains *Strong Obligation or Necessity* (704) is more common for the President’s corpus. Modal auxiliaries *should*, *must*, *need* and the nouns e.g., *responsibility* and *promise* stand for the president’s obligation to be involved in building a better future for the country as well as stressing the need for a collective endeavor:

**13)** All of us **should** be united and act around one plan and one purpose.

We **should** be working on a package of reforms that is mandatory if we seriously see our future in Europe.

In the Methodology section, I explained the focus on the notional words as they are the carriers of content in the narratives of the politicians. Nevertheless, I consider *Pronouns* worthy of attention too, as they promote the sense of collective or individual representation. Interestingly enough, *Pronouns* semantic domain is shared by both corpora with the absolute frequencies 7473 for Corpus 1 and 2964 for Corpus 2 (Table 4). I would single out the use of the collective pronoun *We* and a personal, egocentric pronoun *I*. Viewing Word SEM Frequency Profile in Wmatrix5 supplies relative frequencies as well.<sup>6</sup> The relative frequency of Collective *We* in the Presidential and Prime Ministerial speeches is 1.58 and 1.33 respectively.

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<sup>6</sup> #LancsBox Report and Wmatrix outputs for Corpus 1 and Corpus 2 Semantic Domains Analysis are represented on Harvard Dataverse on the final page (Guliashvili 2024) <https://doi.org/10.7910/DVN/Q2WQMD>

Regarding the pronoun *I*, relative frequency 1.26 is related with the President’s discourse and 1.25 with the Prime Minister’s discourse. Seemingly, there is no significant difference between the uses of the “*We-I*” opposition. The President and the Prime Minister opt for “*We-I*” pronouns to stress either collective or individual, personal endeavors.

***The Effects of Stance Taking***

CADS tends to be effective in identifying trends regarding stance-taking. Both lexicometric and textometric analyses could supply quantitative as well as qualitative data in relation to the linguistic strategies of positioning stances on the specific object of investigation. In the methodological section, the importance of exploring the modal verbs along with other notional parts of speech is highlighted, as they could be the indexicals of stance-taking in the discourse. More precisely, epistemic stance could be marked via modal verbs: *will/would, may, might*.

Table 3 shows the distribution of modal verbs indexing stance in the discourse. The President positions her stances more effectively than the prime minister<sup>7</sup> (the difference is significant  $p<0.05$ ). Epistemic stance taking promotes discursive efficacy in the case of the Presidential addresses, as it deals with positioning facts, expectations, knowledge, or beliefs towards the EU accession with certain degree of certainty concerning the object of discussion (Chindamo et.al. 2012, p.23).

**Table 3.** Relative and absolute frequencies of modal verbs indexing epistemic stance

	Corpus 1		Corpus 2	
	Absolute freq.	Relative freq.	Absolute freq.	Relative freq.
<i>Will</i>	468	0.76	133	0.47
<i>Would</i>	109	0.18	65	0.23
<i>May</i>	38	0.06	34	0.12
<i>Might</i>	24	0.04	1	0.00
Total	639		233	

Excerpt 14 below is an interesting example from the President’s addresses featuring all three types of stance-taking. The President evaluates recommendations as external ones that Georgia has to implement. This aspect is indexed via a modal auxiliary marker *may* and coupled with affective/attitudinal modal *must* and *should*. The whole passage is bolstered through stylistic stance indicators, such as *importantly* and *ideally*.

**14) Importantly**, this process **should** unfold organically and without coercion. [...] We are aware of receiving recommendations, and at times, there is a subtle sense that these suggestions **may** seem external. **Ideally**, our aspirations **should** align with these recommendations, as

<sup>7</sup><http://ucrel-api.lancaster.ac.uk/cgi-bin/lisimple.pl?f1=639&f2=233&t1=64.321&t2=29.559>

we strive to build a more developed, stronger, and more equitable tomorrow driven by an intrinsic desire for knowledge and protection, independent of external influences. [...] We **must** strive for this, free from limitations or external pressures. True freedom is the ability to shape your own tomorrow.

Attitudinal or affective stance is also prominent in the President’s speeches ( $p < 0.05$ )<sup>8</sup>, it stresses affect including feeling, mood, disposition and attitude.

Table 4 below presents the absolute and relative frequencies of modal auxiliaries expressing attitudinal stance in the two corpora. The data show that *should*, *must*, and *need* occur considerably more in Salome Zourabichvili’s corpus (Corpus1) than in Prime Minister’s (Corpus 2).

**Table 4.** Relative and absolute frequencies of modal auxiliaries indexing attitudinal stance

	Corpus 1		Corpus 2	
	Absolute freq.	Relative freq.	Absolute freq.	Relative freq.
<i>should</i>	204	0.33	21	0.07
<i>must</i>	91	0.15	18	0.06
<i>need</i>	75	0.12	14	0.05
Total	370		53	

The attitudinal stance is coupled with the collocate *European path* that Georgia has to follow to ensure bright future. Excerpt 15 is the instantiation of psycho-social and emotive connections:

**15)** We all know that today, what this country **needs** the most is the path of Europe, to succeed on this **European path**. Everyone's role here is very important; everyone **should** do their part.

We can now examine the PM’s stance-taking with regard to European journey. The excerpt (16) below is the passage from the PM’s addresses on the EU’s candidate perspective, which he evaluates as a positive achievement. Nevertheless, he stresses the importance of gaining the status of an EU Candidate Country, which could end polarization in the country. The commitment that needs to be delivered is proposed as a joint endeavor of the government, authorities, parliament and opposition, as the European perspective is a credit to his team:

**16)** We did! I have already listed all these genuine achievements. European Perspective is I **would** say a historic decision. Prior to that you **may** recall that a lot of skepticism existed in the capital cities of Europe. Some referred to the geographic distance, others criticized and pointed at many other issues, including the Russian occupation, so on and so forth. By granting the European Perspective to Georgia, every speculation and assumption of where Georgia stands, has vanished.

<sup>8</sup> <https://ucrel-api.lancaster.ac.uk/cgi-bin/llsimple.pl?f1=370&f2=53&t1=64.321&t2=29.559>

Europe has vocally said that Georgia belongs to Europe, and the country **will** accede to the EU. **In this journey**, of course, the next stage is the status of an EU Candidate Country, which is a merely symbolic decision. Nevertheless, it is a significant one.

This passage is a discursive framing of EU accession through epistemic stance-taking combined with a journey metaphor that cognitively reinforces position. As for attitudinal/affective stance-taking, it is realized through modal verb *should* as well as notional verbs such as *hope* and *believe*:

17) Georgia knows that it belongs to Europe. Now Europe **should** draw conclusions. It is essential for Georgia to get established within Europe, while the western nations - need to admit Georgia into their family ". These words as never before apply to the current reality. We **hope** and strongly **believe** that a historic process is getting its foundation laid today, which **will** lead to the accession of Georgia into the **European family**.

Overall, the PM's narrative blends epistemic modals and attitudinal stances with conceptual metaphors associating EU accession to a *journey* and the EU to a *family*. Taking quantitative aspect of analysis along with semantic instantiations into consideration, the term *path* in the President's speeches frames Georgia's EU accession as a journey. In addition to this, the semantic examination suggests that this metaphor is used to highlight hope, progress, and European values. Conversely, the Prime Minister applies *path* more pragmatically, linking it to economic development and political stability within the context of EU membership.

A key finding in this study is the distinction between epistemic and deontic stance expressed via modal verbs. For instance, the use of *will* in the President's speeches indicates certainty and a forward-looking, optimistic stance on EU accession, while the Prime Minister frequently uses *may*, reflecting a more cautious and tentative position on the issue.

## Conclusion

The present study endeavored to examine how Georgia's two leading political figures, former President Salome Zourabichvili and former Prime Minister Irakli Garibashvili, discursively represent the nation's path toward European Union accession. By employing the methodological framework of Corpus-Assisted Discourse Studies (CADS), this paper combined quantitative and qualitative methods to uncover how language shapes political realities and how individual idiolects mirror differing political agendas and communicative strategies within the same national narrative.

Through *lexicometric* and *textometric* analyses, the research identified significant patterns that reveal not only lexical preferences but also the broader

discursive structures that underpin the politicians' positioning. The key lexical items – *Georgia, Georgian, Europe, European, country, people, Ukraine, and government* – emerge as the most salient lexemes across both corpora. It should be noted that while both political figures engage with these notions, statistical analysis showed that Garibashvili's discourse is more saturated with references to *Georgia*; This aspect indicates his emphasis on national sovereignty and self-reliance as prerequisites for European integration, while Zourabichvili's discourse features a stronger focus on *Europe* and *European* values, which reflects a vision of cultural and ideological unification of Georgia and Europe.

The analysis of collocational patterns revealed that both leaders conceptualize the EU through metaphorical frameworks of *journey* and *family*. Zourabichvili's linguistic repertoire exhibits more varied range of collocates, implying a dynamic and inclusive interpretation of Georgia's European trajectory. Discourse is rich in the recurrent use of epistemic and attitudinal modals such as *will, must, and should*. The Prime Minister's linguistic behaviour, on the other hand, features the combination of epistemic and attitudinal stance-taking with a *journey* and a *family* metaphor; For Irakli Garibashvili sovereignty and economic strength of Georgia is intertwined with the process of EU accession. In effect, the discursive constructions of the EU accession in relation to politicians' positions and stances appear, on the evidence presented here, more alike irrespective of the alleged political discord.

The semantic domain analysis deepened the understanding of how both politicians linguistically encode the conceptualization of the EU accession process. Shared domains such as *Government, belonging to a group, Location and Direction, and General actions* reflect a convergence around collective effort and forward movement; Nevertheless, there are some divergences in emphasis, for instance, Zourabichvili posits a robust orientation toward *Strong obligation/necessity* and *Future time* references as opposed to Garibashvili who prioritizes *Numbers* and *Places*. These results suggest that while both figures contribute to constructing the narrative of Georgia's European future, their discursive emphases differ: Zourabichvili stresses values and moral imperatives, whereas Garibashvili centers on pragmatic governance and measurable progress.

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## Appendix

### Lancsbox Output

**Table 1.** Corpora

Name	Language	Texts	Tokens	Additional information
Corpus 1	English	69	64,321	Types: 6,025 Lemmas: 5,648
Corpus 2	English	28	29,559	Types: 3,974 Lemmas: 3,489

**Table 2.** Types in Corpus 1

ID	Type	Absolute frequency (Relative frequency)	Dispersion (CV)
1	the	3632 (564.668)	0.247
2	and	2471 (384.167)	0.227
3	of	2033 (316.071)	0.353
4	to	1977 (307.365)	0.268
5	is	1306 (203.044)	0.385
6	that	1270 (197.447)	0.490
7	in	1146 (178.169)	0.363
8	this	1118 (173.816)	0.462
9	a	1035 (160.912)	0.406
10	we	973 (151.273)	0.570
11	i	788 (122.511)	0.799
12	our	751 (116.758)	0.575
13	for	748 (116.292)	0.411
14	it	722 (112.249)	0.509
15	not	621 (96.547)	0.597
16	be	565 (87.841)	0.622
17	will	517 (80.378)	0.787
18	are	445 (69.184)	0.538
19	you	443 (68.873)	0.871
20	have	439 (68.251)	0.683
21	on	439 (68.251)	0.556
22	as	390 (60.633)	0.627
23	all	389 (60.478)	0.623
24	with	366 (56.902)	0.553
25	georgia	364 (56.591)	0.663
26	european	359 (55.814)	0.973
27	has	342 (53.171)	0.864
28	us	304 (47.263)	0.665
29	europe	295 (45.864)	1.289
30	but	294 (45.708)	0.748
31	country	290 (45.086)	0.807
32	today	286 (44.464)	0.723
33	its	277 (43.065)	1.062
34	by	262 (40.733)	0.639
35	what	258 (40.111)	1.164
36	from	230 (35.758)	0.822
37	or	226 (35.136)	0.736
38	very	221 (34.359)	1.029
39	one	218 (33.893)	0.858

ID	Type	Absolute frequency (Relative frequency)	Dispersion (CV)
40	also	205 (31.871)	0.750
41	should	204 (31.716)	1.035
42	which	198 (30.783)	0.798
43	their	197 (30.628)	0.956
44	there	191 (29.695)	1.044
45	was	191 (29.695)	1.099
46	more	185 (28.762)	1.011
47	no	185 (28.762)	0.876
48	at	181 (28.140)	0.781
49	want	178 (27.674)	1.263
50	future	175 (27.207)	1.052

**Table 3.** Types in Corpus 2

ID	Type	Absolute frequency (Relative frequency)	Dispersion (CV)
1	the	1658 (560.912)	0.281
2	and	1144 (387.023)	0.230
3	of	1142 (386.346)	0.441
4	to	936 (316.655)	0.376
5	our	572 (193.511)	0.518
6	in	569 (192.496)	0.319
7	a	510 (172.536)	0.567
8	is	464 (156.974)	0.655
9	that	406 (137.352)	0.524
10	we	375 (126.865)	0.593
11	i	361 (122.129)	0.619
12	georgia	290 (98.109)	0.896
13	it	276 (93.373)	0.843
14	you	257 (86.945)	0.838
15	for	255 (86.268)	0.703
16	this	229 (77.472)	0.650
17	country	208 (70.368)	0.884
18	with	206 (69.691)	0.602
19	as	200 (67.661)	0.521
20	by	193 (65.293)	0.653
21	are	190 (64.278)	0.630
22	on	182 (61.572)	0.772
23	have	148 (50.069)	0.915
24	was	148 (50.069)	1.195
25	all	136 (46.010)	1.075
26	will	135 (45.671)	0.534
27	be	128 (43.303)	0.880
28	wish	126 (42.627)	1.308
29	not	124 (41.950)	1.037
30	people	111 (37.552)	1.080
31	european	104 (35.184)	1.937
32	has	104 (35.184)	0.796
33	which	103 (34.846)	1.356

ID	Type	Absolute frequency (Relative frequency)	Dispersion (CV)
34	an	99 (33.492)	0.901
35	ukraine	95 (32.139)	1.938
36	also	91 (30.786)	1.321
37	their	90 (30.448)	1.503
38	war	90 (30.448)	1.470
39	at	88 (29.771)	1.094
40	eu	86 (29.094)	1.870
41	government	86 (29.094)	0.889
42	from	83 (28.079)	0.843
43	they	81 (27.403)	2.046
44	world	81 (27.403)	1.548
45	countries	77 (26.050)	1.109
46	my	77 (26.050)	0.997
47	well	77 (26.050)	1.213
48	about	74 (25.035)	1.504
49	me	73 (24.696)	1.013
50	dear	72 (24.358)	0.995

## Religious Coexistence and Legal Pluralism in Albania: Socio-Political and Legal Perspectives

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### Abstract

This article provides a comprehensive examination of Albania's religious coexistence from both socio-political and legal perspectives, highlighting how historical experiences, legal frameworks, and community practices collectively shape interfaith relations. Drawing on case studies from urban centers such as Tirana and Shkodra, as well as rural communities where traditional interfaith networks have persisted, the article explored how legal pluralism, allowing religious communities to manage personal matters like marriage, inheritance, and education, interact with grassroots social engagement to sustain harmony among Albania's diverse religious groups. The article also analyzed institutional policies, including the role of the State Committee on Cults, municipal interfaith programs, and the Interreligious Council of Albania (IRCA), demonstrating how coordinated initiatives between government bodies and civil society promote dialogue, joint cultural events, and collaborative social projects. By tracing the historical trajectory from the Ottoman millet system through the challenges of the communist period to contemporary reforms, the article illustrates the resilience of interfaith tolerance in Albania. This experience provides a distinctive model of religious coexistence, offering valuable lessons for other pluralistic societies in the Balkans and beyond, emphasizing the importance of combining legal recognition, social cooperation, and community-led initiatives to foster enduring interfaith harmony.

**Keywords:** Legal pluralism, religious coexistence, Interfaith dialogue, social cohesion

## Introduction

Albania's experience of religious coexistence offers a distinctive model of pluralism in which legal frameworks, historical memory, and social practice converge to sustain interfaith harmony. Situated at the crossroads of the Balkans, Albania has long been home to Sunni Muslims, Orthodox Christians, Catholics, and Bektashis<sup>1</sup> who have lived together for centuries. What truly distinguishes Albania from other multi-religious societies is not merely the endurance of tolerance, but the institutional and cultural mechanisms that actively reproduce it through law, governance, and community life.

This article argues that Albania's interreligious harmony is the result of a dynamic interaction between legal pluralism, which grants religious communities' autonomy within a secular constitutional order, and grassroots cooperation, manifested in civic initiatives, shared rituals, and interfaith institutions. By examining these mechanisms through historical, legal, and sociological lenses, the article demonstrates how Albania transforms diversity into social cohesion, providing a transferable framework for managing religious pluralism in contemporary societies.

Albania is a multi-religious society, home to Sunni Muslims, Orthodox Christians, Catholics, and Bektashis, who have lived in close proximity and interacted for centuries. This prolonged coexistence has fostered a culture of mutual respect, shared customs, and social collaboration across confessional lines (Clayer, 2014; Endresen, 2015). Despite significant political upheavals, including centuries under Ottoman administration, the radical suppression of religion during the communist period, and the rapid social and economic transformations following the 1990's, interfaith coexistence has remained a persistent and defining feature of Albanian society (Elsie, 2010; Nassehi-Behnam, 1991). Communities have historically maintained informal networks of cooperation, from joint participation in local markets and social events to mutual assistance during crises, illustrating the resilience of interfaith relations in the face of systemic pressures (Hasani, 2020).

This article examined the mechanisms that sustain Albania's religious coexistence, exploring both socio-political dynamics and legal frameworks. On the socio-political side, community traditions, civil society initiatives, and local cooperation play central roles in fostering dialogue, resolving conflicts,

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<sup>1</sup> The Bektashis are a Sufi Islamic order (tariqa) with deep historical roots in Albania. They emphasize spiritual interpretation, religious tolerance, and communal fellowship. Albania is home to the World Headquarters of the Bektashi Community, making the country one of the principal centers of global Bektashism.

and promoting shared cultural heritage (Endresen & Krovel, 2017). Examples include interfaith charity programs in Shkodra, collaborative youth festivals in Tirana, and joint preservation of historic religious sites in smaller towns (Dervishi, 2018).

On the legal side, instruments such as the 1998 Constitution and the Law on Religious Freedom (Law No. 10221, 2017)<sup>2</sup> provide formal recognition to religious communities, allowing them to manage personal matters such as marriage and inheritance while operating under the broader framework of state law (Assembly of the Republic of Albania, 1998; 2017). By integrating historical narratives, detailed case studies, and policy analysis, this study addresses key questions: How have Albania's historical experiences shaped patterns of religious coexistence? What institutional and legal mechanisms effectively support pluralism? How can Albania's experience inform other societies navigating the challenges of religious diversity in multi-confessional contexts?

### **Research Purpose and Scholarly Contribution**

This article advances the existing scholarship on religious coexistence in Albania by offering an integrative framework that unites legal pluralism, socio-political dynamics, and historical continuity into a single analytical model. While earlier works emphasized either Albania's long-standing traditions of interfaith tolerance (Clayer, 2014; Endresen, 2015) or the institutional and legal frameworks governing religious freedom (OSCE/ODIHR, 2020; Hasani, 2020), this article demonstrates that coexistence in Albania is both a legal construct and a lived social reality sustained through the interaction of state policy, community practice, and collective historical memory.

By drawing on case studies from Tirana, Shkodra, Durrës, Korçë, and rural communities, the article provides new empirical depth, illustrating how formal legal mechanisms, such as the 1998 Constitution and the Law on Religious Freedom (2017), intersect with grassroots initiatives, interfaith networks, and traditional practices to maintain harmony across confessional lines (Assembly of the Republic of Albania, 1998; 2017; Qirko, 2019). Furthermore, it expands the scope of previous analyses by identifying the role of civil society and media as contemporary agents of coexistence, showing how NGOs, youth programs, and responsible media narratives contribute to a participatory culture of tolerance (Dervishi, 2018; Fuga, 2019; Shehu, 2022).

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<sup>2</sup> Law No. 10221 (2017) on Freedom of Religion and Religious Organizations regulates the legal status, rights, and obligations of religious communities in Albania, defining principles of autonomy, equality, state neutrality, property rights, and the framework for cooperation between the state and religious institutions.

The article also refines the conceptual understanding of legal pluralism in the Albanian context, tracing its historical roots from the Ottoman millet system to post-communist constitutionalism, and demonstrating how this pluralist legacy informs modern governance and interfaith cooperation (Shaw & Shaw, 1977; Clayer, 2014; Puto, 2009). In doing so, the article reframes Albania's experience not as a passive cultural inheritance but as a dynamic model of adaptive pluralism, offering comparative insights for other multi-religious societies seeking to balance religious autonomy, civic participation, and national cohesion (Endresen & Krovel, 2017; European Commission, 2022).

### **Literature Review**

Existing scholarship on religious coexistence in Albania emphasizes the country's unique synthesis of legal pluralism, historical experience, and civic engagement as the foundation for its interfaith harmony. Scholars such as Clayer (2014) and Endresen (2015) highlight how centuries of coexistence among Sunni Muslims, Orthodox Christians, Catholics, and Bektashi's have cultivated a deeply ingrained culture of tolerance that transcends confessional boundaries. Historical analyses trace this resilience to the Ottoman millet system, which institutionalized communal autonomy while enabling interreligious collaboration (Shaw & Shaw, 1977; Jazexhi, 2010).

Building on this foundation, recent scholarship by key authors such as Nathalie Clayer (2014), Gilles de Rapper (2008; 2012), Albert Doja (2011; 2014), and Bernd Fischer (1999; 2010) further enriches the understanding of religious coexistence in Albania and the broader Balkans. Clayer (2014) highlights the historical interplay between Islam, nationalism, and modernization, arguing that Albanian secularism emerged as an adaptive cultural form rather than a Western imposition.

De Rapper (2008, 2012) provides ethnographic insights into how local memory and religious practice shape identity in southern Albania, demonstrating that coexistence functions as a lived moral economy rooted in neighborhood reciprocity. Doja (2011, 2014) emphasizes the sociological dimensions of secularization and religious revival in post-communist societies, framing Albanian pluralism as a process of "cultural negotiation" between tradition and modernity. Meanwhile, Fischer (1999, 2010) situates these developments within the long trajectory of Albanian state-building, showing how political transformations and foreign influences have redefined religion's public role. Together, these authors provide a robust theoretical and empirical grounding for the analysis that follows, situating Albania's model of coexistence within both national and regional comparative contexts.

Conversely, the communist regime's suppression of religion in the twentieth century, as explored by Vickers and Pettifer (1997) and Puto (2009), disrupted these traditions yet paradoxically reinforced shared cultural identities that resurfaced in the post-1990s revival of religious life (Elsie, 2010; Endresen & Krovel, 2017).

More recent studies situate Albania's experience within a framework of legal pluralism, noting how the Constitution of the Republic of Albania (Assembly of the Republic of Albania, 1998) and the Law on Religious Freedom (Assembly of the Republic of Albania, 2017) formalized equality and autonomy for religious communities while preserving state oversight (OSCE/ODIHR, 2020). Hasani (2020) and Dervishi (2018) argue that these provisions, when coupled with civic initiatives and NGO-led programs, translate legal guarantees into tangible practices of coexistence through education, interfaith dialogue, and social cooperation. Case-based research in Tirana and Shkodra further demonstrates how local institutions, youth networks, and the Interreligious Council of Albania (IRCA) operationalize these frameworks to promote mutual trust and cultural exchange (Qirko, 2019; UNDP, 2017).

Contemporary analyses also engage with the role of media and civil society in shaping public narratives that valorize diversity and counter extremist discourse (Fuga, 2019; Shehu, 2022; Voko, 2021). Collectively, the literature underscores that Albania's interfaith coexistence is not a static legacy but a dynamic sociopolitical process sustained through the interaction of law, community leadership, and historical consciousness. This multidimensional approach positions Albania as an instructive model for pluralistic societies seeking to balance religious freedom, institutional inclusivity, and cultural resilience.

## **Methodology**

This study employed a qualitative and interdisciplinary research design that integrates historical analysis, legal interpretation, and sociological inquiry to examine the dynamics of religious coexistence and legal pluralism in Albania. The approach reflects the complexity of the subject matter, as interfaith relations in Albania cannot be fully understood through a single disciplinary lens. By combining these three fields, the research captured the multilayered nature of Albanian religious life, its institutional structures, cultural practices, and historical continuities. The methodology is grounded in the recognition that Albania's interreligious coexistence is both a social reality and a legal construct, sustained through the interaction of state policy, community traditions, and historical legacies (Clayer, 2014; Endresen & Krovel, 2017).

The article adopted a multi-source and multi-method strategy, drawing on documentary analysis, case studies, and interpretive evaluation of both primary and secondary materials. This pluralistic approach ensures a comprehensive understanding of how legal frameworks and social practices converge to foster interfaith harmony. Rather than testing hypotheses, the study's primary goal was to interpret and contextualize mechanisms of coexistence, emphasizing meaning, continuity, and adaptation within a historically dynamic environment.

The primary sources of data include constitutional and legislative documents that define the legal and institutional foundations of religious freedom in Albania. Central among these are the Constitution of the Republic of Albania (1998) and the Law on Religious Freedom (2017), both of which codify principles of equality, pluralism, and autonomy for religious communities (Assembly of the Republic of Albania, 1998; 2017). These legal texts are complemented by official reports and institutional records issued by bodies such as the State Committee on Cults, the Ministry of Culture, and the Interreligious Council of Albania (IRCA). Such documents are indispensable for understanding how legal norms are translated into governance practices, as they outline state–religion relations, mechanisms of property restitution, and state involvement in interfaith cooperation initiatives.

In addition to legislative and institutional sources, the study integrated historical and ethnographic literature to provide diachronic depth to the analysis. Works by Clayer (2014), Endresen and Krovel (2017), and Puto (2009) contextualize the evolution of interfaith coexistence from the Ottoman millet system through the communist suppression of religion and into the post-1990s democratic period. These texts illuminate the cultural and political transformations that have shaped religious identities, patterns of tolerance, and local governance traditions.

To complement the legal and historical dimensions, case studies were developed from both urban and rural contexts. Urban centers, Tirana, Shkodra, Durrës, and Korçë, were chosen due to their diverse religious composition and their roles as hubs of social and institutional innovation in interfaith cooperation (Qirko, 2019; Hasani, 2020). Conversely, rural communities were selected for their capacity to illustrate continuities of traditional coexistence practices, such as shared participation in religious holidays, joint agricultural rituals, and informal conflict mediation processes. These cases collectively revealed the interaction between formal legal structures and local customary norms, allowing for an understanding of coexistence as both a policy outcome and a lived social practice.

The article also embedded its analysis within a historical framework, recognizing that Albania's religious coexistence cannot be detached from its long-term political and cultural evolution. During the Ottoman era, the millet

system granted religious communities significant autonomy in managing their own institutions, including schools, courts, and charitable foundations (Shaw & Shaw, 1977; Clayer, 2014). Sunni Muslims, Orthodox Christians, and Catholics maintained distinct spiritual identities while engaging in mutual economic and cultural exchange, establishing durable patterns of coexistence that influenced local customs and intergroup relations (Jazexhi, 2010; Endresen, 2015).

The communist period (1946–1990) constituted a radical rupture in this tradition. Declaring itself the world’s first officially atheist state in 1967, Albania prohibited all forms of religious expression, confiscated church and mosque properties, and persecuted religious figures (Vickers & Pettifer, 1997; Puto, 2009). Yet even in this repressive environment, informal networks of faith persisted, as families clandestinely practiced religious rituals and maintained community ties (Elsie, 2010; Endresen & Krovel, 2017). This endurance of cultural memory provided the foundation for post-communist religious revival and the restoration of interfaith institutions.

After 1990, Albania witnessed a remarkable resurgence of religious life. The rebuilding of churches, mosques, and tekkes, alongside the creation of organizations such as the Interreligious Council of Albania (IRCA) in 2007, marked a period of institutional and civic renewal (Interreligious Council of Albania, 2017; Qirko, 2019). This post-communist transformation demonstrates both resilience and adaptability, reflecting how historical legacies and social networks were reactivated under new democratic and pluralistic conditions (Hasani, 2020; Clayer, 2014).

Data collection followed a triangulated and systematic approach, ensuring the reliability and richness of interpretation. The process was divided into three principal components:

**Documentary and Legislative Analysis:** Examination of primary legal materials, the Constitution of Albania (1998), the Law on Religious Freedom (2017), and state regulations on religious communities, was conducted to identify legal norms and institutional arrangements that sustain pluralism. Additional analysis of reports by the OSCE/ODIHR (2020), the European Commission (2022), and the Ministry of Culture of Albania (2019) provided insight into how these frameworks operate in practice.

**Secondary Literature Review:** A comprehensive review of scholarly and policy literature provided the theoretical and empirical foundation for the study. Works by Dervishi (2018), Endresen and Krovel (2017), Hasani (2020), and Qirko (2019) were especially valuable for understanding interfaith dialogue, community resilience, and the role of NGOs in promoting coexistence.

Case Study Examination: Case studies from Tirana, Shkodra, Durrës, Korçë, and selected rural villages were chosen for their diversity of religious composition and documented examples of interfaith engagement. Each case was examined through a comparative interpretive lens, focusing on community-level cooperation, local governance, and integration of customary norms within formal legal mechanisms (UNDP, 2017; Interreligious Council of Albania, 2017).

To further strengthen the evidence base, the research also reviewed media reports and NGO publications, which often document interfaith events, youth programs, and public discourse on religion. This inclusion of non-academic and policy-oriented sources ensures that the analysis captures both official and grassroots perspectives.

Data analysis was conducted through a combination of thematic coding and comparative content analysis, consistent with qualitative research best practices. Legal and institutional documents were examined for recurring principles such as religious autonomy, state neutrality, and cooperative governance. Historical and sociological texts were coded according to key themes, continuity, rupture, adaptation, and resilience, reflecting the stages of Albania's religious evolution.

The comparative dimension of the analysis allowed for identifying similarities and differences between urban and rural patterns of coexistence. For example, while Tirana and Shkodra exhibit institutionalized interfaith programs supported by local governments, rural communities maintain coexistence through traditional mechanisms of mutual aid and mediation (Qirko, 2019; Hasani, 2020). This duality underscores how religious harmony in Albania is sustained through both modern institutional frameworks and deeply rooted cultural practices.

Triangulation across legal, historical, and sociological sources served as a methodological safeguard, enhancing validity, credibility, and interpretive depth (Dervishi, 2018; UNDP, 2017). This multidimensional analysis allows the study to reveal how law, policy, and community behavior interact dynamically to produce a stable model of interfaith coexistence.

Although the qualitative and document-based approach yields rich contextual insights, it inevitably presents certain methodological limitations. The study relies primarily on secondary data and official reports, which may not fully capture the nuances of informal religious practices or personal experiences of coexistence. Moreover, the lack of longitudinal fieldwork limits the ability to trace the evolution of interfaith relations over extended periods. Regional disparities, particularly between urban and rural zones, also pose challenges for generalizing findings across the entire country.

Nevertheless, these limitations are mitigated by the use of triangulation and cross-verification between multiple sources, ensuring analytical rigor and contextual accuracy. The integration of institutional, historical, and ethnographic perspectives compensates for the absence of primary interviews by offering a multi-layered understanding of religious coexistence as both a lived and legally regulated phenomenon.

Ethical considerations were also central to the research design. Given the sensitivity of religious identity, all interpretations were guided by principles of academic neutrality, respect for diversity, and avoidance of confessional bias. The study prioritizes a balanced representation of all major faith communities, Sunni Muslim, Orthodox Christian, Catholic, and Bektashi, reflecting Albania's pluralistic reality.

In summary, this research employed a comprehensive qualitative methodology that situates Albania's model of religious coexistence within its broader legal and socio-historical context. By integrating documentary analysis, comparative case studies, and interpretive synthesis, the study reveals how legal pluralism, historical experience, and community agency converge to sustain interfaith harmony. The methodological rigor of triangulation across disciplines ensures both analytical depth and reliability, offering a replicable framework for future studies of pluralism in other multi-religious societies. Through this methodological lens, the article not only documents Albania's experience but also contributes to a broader understanding of how law, culture, and civil society interact to uphold religious peace and social cohesion in diverse national contexts.

The analytical framework of this article draws upon theories of legal pluralism (Griffiths, 1986; Tamanaha, 2008), which conceptualize law as a network of overlapping normative orders rather than a singular system. In parallel, the study engages insights from interfaith coexistence scholarship (Appleby, 2000; Triantafillou, 2017), framing Albania's experience as an example of "everyday pluralism," where institutional and social dimensions reinforce one another. This theoretical synthesis anchors the analysis in established academic debates while demonstrating how Albania contributes a distinctive model to the study of law, religion, and multicultural governance.

### **Analytical Approach: Beyond Historical Narration**

While the historical trajectory of religious coexistence in Albania, from the Ottoman millet system through the communist period to the democratic era, forms the contextual backbone of this study, the analysis deliberately goes beyond descriptive narration. Rather than recounting events, the research interprets *how* and *why* specific historical experiences have produced enduring mechanisms of pluralism. By integrating legal interpretation, sociological inquiry, and policy analysis, the study examines

the institutional, normative, and cultural processes that sustain interfaith cooperation in contemporary Albania.

The historical material serves as an interpretive framework for understanding the evolution of legal pluralism, the transformation of state–religion relations, and the interaction between formal governance and community practice (Clayer, 2014; Endresen & Krovel, 2017; Hasani, 2020). This approach reframes history as evidence of systemic adaptation, revealing how past experiences inform present structures of coexistence, thereby transforming historical narration into a multidimensional analytical tool for understanding social resilience and legal inclusivity in pluralistic societies.

### **Socio-Political Dynamics**

Religious coexistence in Albania extends beyond formal legal frameworks, being deeply rooted in social and political structures that facilitate daily interaction and cooperation among diverse communities. Local councils, neighborhood committees, and communal festivals provide platforms for routine engagement, allowing Sunni Muslims, Orthodox Christians, Catholics, and Bektashis to collaborate on shared civic and cultural activities (Clayer, 2014; Endresen & Krovel, 2017). For instance, in Tirana, communities of different faiths jointly celebrate national holidays, organize neighborhood clean-up campaigns, and participate in cultural programs, demonstrating social cohesion that transcends religious boundaries (Dervishi, 2018; Hasani, 2020). These practices not only reinforce communal bonds but also normalize interfaith cooperation as a routine aspect of civic life.

Civil society organizations and non-governmental organizations (NGOs) play a critical role in strengthening interfaith understanding and fostering tolerance (Qirko, 2019; Voko, 2021). Programs targeting youth education, volunteer service, and structured interfaith dialogue have successfully cultivated awareness, reduced prejudice, and encouraged collaborative problem-solving (Endresen, 2015; Dervishi, 2018). Media outlets further contribute to shaping public narratives of coexistence. Television, radio, and print media frequently highlight interfaith events, youth initiatives, and community collaboration, reinforcing the perception that religious diversity is a resource for social cohesion rather than a source of division (Fuga, 2019; Shehu, 2022). Together, these socio-political mechanisms demonstrate that Albania's religious coexistence is not a passive condition ensured solely by legal recognition; it is an active, dynamic practice maintained through sustained social engagement, community leadership, and the cultivation of shared cultural values. This combination of legal structures and social practices illustrates the multifaceted nature of interfaith harmony and offers a practical model for other pluralistic societies seeking to strengthen communal resilience (Endresen & Krovel, 2017; Qirko, 2019).

## Case Studies of Coexistence

Tirana serves as a prominent example of urban religious coexistence in Albania. In many neighborhoods, churches, mosques, and Bektashi tekkes are located in proximity, reflecting the city's historical and contemporary religious diversity (Dervishi, 2018; Endresen & Krovel, 2017). Joint initiatives, such as interfaith festivals, youth engagement programs, and community service projects, encourage daily interaction among members of different faiths. For instance, youth programs bring Orthodox, Muslim, Catholic, and Bektashi students together for cultural activities, volunteer work, and educational workshops (Qirko, 2019). These collaborative activities foster social trust, reduce intergroup tensions, and reinforce the effectiveness of legal and institutional frameworks, demonstrating how urban settings can serve as laboratories for interfaith cooperation (Hasani, 2020).

Shkodra, historically a center of Catholic–Muslim coexistence, illustrates how practical cooperation strengthens interfaith relations. Religious communities collaborate in organizing cultural festivals, charitable initiatives, and educational programs that integrate interfaith dialogue (Dervishi, 2018). For example, during major religious holidays, Catholic and Muslim communities jointly provide aid, such as food, medical support, and school supplies, to vulnerable families, fostering mutual respect and shared responsibility (UNDP, 2017). Local schools often incorporate lessons on religious tolerance and cooperation, teaching children the historical and cultural significance of interfaith collaboration (Hasani, 2020; Voko, 2021). Other urban centers, such as Korçë and Durrës, also demonstrate active interfaith engagement. In Korçë, Orthodox and Muslim communities jointly maintain historic religious sites and organize exhibitions highlighting shared cultural heritage (Clayer, 2014). In Durrës, multi-religious youth councils collaborate on environmental initiatives and community service projects, blending civic participation with interfaith cooperation (European Commission, 2022).

In rural areas, traditional coexistence practices remain particularly resilient. Villages with mixed populations celebrate religious holidays together, share communal resources, and resolve disputes through local mediation that integrates both state law and customary norms (Puto, 2009; Nassehi-Behnam, 1991). These practices illustrate the dynamic interaction between formal legal frameworks and long-standing social traditions, showing that coexistence is sustained not only by institutions but also by embedded cultural practices and ongoing communal engagement (Endresen, 2015).

These case studies also reveal the specific mechanisms through which legal pluralism supports interfaith coexistence in practice. Shared civic institutions, such as the Interreligious Council of Albania (IRCA) and the State Committee on Cults, create formal spaces for dialogue, joint decision-making,

and resource coordination. Local mediation councils, often composed of representatives from multiple faith communities, apply both legal and customary norms to settle property or administrative disputes, translating the constitutional principle of equality into everyday governance. Cross-confessional social services, including youth organizations, schools, and charitable networks, operationalize coexistence by bringing communities together around common social goals. These institutional and social mechanisms demonstrate that pluralism in Albania is not only a constitutional principle but also an active process of civic negotiation.

A comparison between urban and rural settings underscores the multi-layered nature of coexistence. In cities such as Tirana and Durrës, pluralism is sustained through formal institutions, educational initiatives, and civic engagement programs that embody a state–society partnership. In contrast, rural regions like Shkodra and surrounding villages rely on informal mechanisms, shared rituals, interfamily alliances, and customary dispute mediation, that reflect long-standing traditions of trust and reciprocity. This contrast illustrates that Albania’s interfaith harmony is both structurally embedded in law and culturally embedded in everyday life, revealing the resilience of pluralism across social contexts.

Furthermore, international initiatives, supported by organizations such as the United Nations Development Program (UNDP) and various European programs, have enhanced these efforts by providing training, resources, and platforms for dialogue, reinforcing the sustainability of interfaith cooperation even in smaller communities (UNDP, 2017; OSCE/ODIHR, 2020).

Collectively, these case studies highlight how Albania’s combination of legal recognition, institutional support, social engagement, and educational initiatives ensures that religious coexistence is both adaptive and resilient. By fostering interaction across generations, promoting collaborative projects, and linking historical experience with contemporary practice, Albania demonstrates a practical model for sustaining interfaith harmony in both urban and rural settings (Hasani, 2020; Endresen & Krovel, 2017).

### **Brief Report on Key Challenges of Religious Coexistence in Albania**

Despite Albania’s long-standing tradition of interfaith harmony, several contemporary challenges increasingly influence the stability and sustainability of coexistence. These challenges emerge from demographic, socio-economic, political, and cultural transformations that shape community dynamics in both urban and rural settings. The key issues can be summarized as follows:

### **1. Migration and Demographic Change**

Mass emigration of youth and rural depopulation weaken traditional interfaith networks, reduce community cohesion, and erode long-standing mechanisms of informal mediation. The inflow of new cultural and religious influences through migration also introduces diverse ideological currents that may challenge established norms of coexistence.

### **2. Globalization and Transnational Influences**

Global communication flows, digital media, and the presence of foreign religious organizations introduce new theological interpretations, identity narratives, and financial influences. While some foster dialogue and development, others may create ideological imbalances or encourage competing forms of religious authority.

### **3. Political Polarization and Public Debate**

Increasing political polarization in Albania affects public discourse on religion, religious education, cultural heritage, and identity. Media sensationalism and politicization of religious issues can generate tension, distort public perception, and undermine the tradition of moderation and cooperation among religious communities.

### **4. Economic Pressures and Social Inequality**

Persistent socio-economic challenges, including poverty, unemployment, and limited access to public services in rural areas, can amplify intergroup tensions. Communities with fewer resources may become more vulnerable to external influence or ideological manipulation.

### **5. Property Restitution and Administrative Disputes**

Unresolved issues related to religious property restitution, urban development, and the allocation of public spaces occasionally generate friction between religious institutions and local authorities. These disputes test the balance between legal autonomy and state oversight.

### **6. Radicalization Risks in the Digital Age**

Although Albania remains largely resistant to extremist narratives, online platforms allow rapid circulation of radical content. Vulnerable youth, especially in marginalized areas, may be exposed to ideologies that disrupt the culture of coexistence.

Overall, while Albania's tradition of interfaith harmony remains robust, these emerging challenges require coordinated policy attention, community engagement, and continuous investment in education, dialogue, and transparent governance.

Despite Albania's notable successes in sustaining interfaith coexistence, several challenges persist, particularly in rural regions where access to structured interfaith programs and institutional support is limited (OSCE/ODIHR, 2020; European Commission, 2022). Urban migration, economic pressures, and demographic shifts have altered community compositions, occasionally straining traditional inter-community relationships and creating localized tensions (Voko, 2021). Additionally, while extremist ideologies remain relatively marginal, their emergence, amplified through social media and transnational networks, represents a potential threat to social cohesion, underscoring the need for ongoing vigilance and proactive measures to safeguard pluralism (Hasani, 2020; Clayer, 2014).

Looking toward the future, multiple opportunities exist to further strengthen interfaith harmony and resilience. Expanding educational initiatives that emphasize tolerance, religious literacy, and mutual understanding in schools can cultivate respect for diversity among younger generations (Dervishi, 2018; Qirko, 2019). Youth programs that combine civic engagement with interfaith dialogue, such as volunteer projects, cultural festivals, and collaborative community service, can reinforce bonds across faith communities and prepare the next generation of leaders to uphold coexistence (UNDP, 2017). Enhancing the capacity of local institutions, including municipal councils and the State Committee on Cults, to mediate disputes and support community-driven initiatives is equally critical (Ministry of Culture of Albania, 2019). Moreover, integrating historical knowledge of Albania's long-standing patterns of interfaith cooperation into public discourse can reinforce the narrative of coexistence, promoting societal appreciation for pluralism and continuity in communal practices (Endresen & Krovel, 2017; Elsie, 2010).

By combining proactive policy measures, educational strategies, community engagement, and historical awareness, Albania can continue to serve as a model for other pluralistic societies navigating the challenges of religious diversity. These approaches illustrate that sustaining interfaith harmony requires both structural frameworks and active social participation, ensuring that coexistence is not only a legal guarantee but a lived reality across generations (Hasani, 2020; Endresen, 2015).

## **Conclusion**

This study demonstrates that Albania's model of interfaith coexistence is sustained by the interplay between legal pluralism, civic engagement, and cultural tradition. Through historical continuity and institutional innovation, Albania has developed a form of embedded pluralism in which constitutional guarantees, social cooperation, and local customs reinforce each other. The research confirms that coexistence in Albania is not a static inheritance but an

evolving system of governance that links legal, social, and cultural dimensions of plural life.

The findings reveal that the mechanisms translating legal pluralism into everyday coexistence include shared civic institutions (such as the Interreligious Council of Albania), local mediation councils, and cross-confessional initiatives in education and social welfare. These structures ensure that pluralism remains both legally grounded and socially practiced, allowing communities to resolve disputes and collaborate within a framework of mutual respect. The comparison between urban and rural contexts, Tirana and Durrës on one hand, Shkodra and surrounding villages on the other, shows that pluralism adapts to its environment: in urban areas through institutional coordination, and in rural areas through long-standing traditions of reciprocity.

By integrating theoretical perspectives from legal pluralism (Griffiths, 1986; Tamanaha, 2008) and interfaith coexistence scholarship (Appleby, 2000; Triantafillou, 2017), this study contributes to ongoing debates on how religious diversity can be managed constructively in post-communist societies. Albania's experience demonstrates that pluralism is not merely the absence of conflict but the presence of active cooperation, an institutional and cultural equilibrium continuously maintained through negotiation.

Policy implications arising from this analysis highlight the importance of supporting interfaith education across school curricula, expanding local mediation and dialogue councils, and increasing public transparency in religious funding and heritage management. These measures can help safeguard the pluralistic ethos that underpins Albania's social cohesion, particularly amid challenges related to migration, globalization, and political polarization.

## **Recommendations**

Building on the findings of this article, a series of targeted recommendations can further strengthen and sustain interfaith coexistence and legal pluralism in Albania. First, educational initiatives should be expanded at all levels—particularly in secondary schools and universities—to enhance religious literacy, cultural awareness, and mutual tolerance. Integrating modules on interfaith dialogue, civic ethics, and democratic citizenship into national curricula would help younger generations internalize values of respect, cooperation, and social responsibility (Dervishi, 2018; Qirko, 2019).

Second, institutional capacity-building remains essential. The State Committee on Cults, municipal authorities, and other relevant state bodies would benefit from specialized training in religious law, conflict mediation, and community engagement. Strengthening coordination between government institutions and religious communities can improve communication, ensure equitable policy implementation, and support more efficient resolution of

disputes related to property, education, or administrative competencies (OSCE/ODIHR, 2020; Ministry of Culture of Albania, 2019).

Third, reinforcing civil society engagement is crucial for sustaining interfaith dialogue at the grassroots level. NGOs, youth organizations, and local councils should receive greater support through small grants, capacity-building programs, and joint partnership platforms that promote collaborative community projects—especially in rural and underrepresented regions where traditional coexistence networks are more vulnerable (UNDP, 2017; Voko, 2021).

Fourth, media institutions should continue promoting balanced and constructive narratives about Albania’s longstanding traditions of religious coexistence. The development of journalistic ethics guidelines for reporting on faith-related issues could help counter polarization, reduce sensationalism, and reinforce the perception of religious diversity as a foundational cultural asset (Fuga, 2019; Shehu, 2022).

Finally, future research should build on the findings of this article by conducting comparative studies across the Western Balkans and other multi-religious contexts. Examining how diverse states institutionalize legal pluralism and manage interfaith cooperation would further clarify the unique contributions of the Albanian model. In this way, Albania offers not only a national example but also a regional laboratory for understanding how law, religion, and society can coexist constructively within a plural democratic framework. Strengthening regional partnerships, academic exchanges, and cross-border research initiatives can amplify Albania’s role as a reference point for peaceful pluralism in the twenty-first century.

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## Entre terre natale et exil forcé : cartographie des causes structurelles du déplacement interne en Afrique centrale (2015-2025)

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### Résumé

L'Afrique centrale est confrontée à une recrudescence des déplacements internes, souvent perçus comme des réactions immédiates à la violence armée. Toutefois, une lecture approfondie révèle des causes plus profondes, structurelles et durables. Cette étude vise à cartographier ces causes à travers une double lecture : géopolitique et constructiviste phénoménologique. L'objectif est de dépasser la lecture événementielle pour interroger les logiques structurelles et les constructions sociales qui sous-tendent l'exil forcé dans cette région.

La démarche méthodologique repose sur une analyse géopolitique des rapports de force et des dynamiques territoriales à l'échelle des États et des localités touchées, selon la méthode de François Thual. À cela s'ajoute une lecture constructiviste phénoménologique inspirée des travaux de Peter Berger et Thomas Luckmann, afin de comprendre comment les déplacements sont vécus, interprétés et institutionnalisés par les acteurs sociaux. L'étude mobilise une triangulation de données issues de rapports institutionnels (OIM, HCR), de travaux scientifiques, de récits de déplacés internes et d'entretiens avec des acteurs humanitaires dans quatre pays : Cameroun, Tchad, République centrafricaine et République démocratique du Congo.

Les résultats révèlent que les déplacements internes sont le produit d'un faisceau de causes structurelles : conflits autour de la terre et des ressources naturelles, marginalisation politique, militarisation de l'espace

rural, catastrophes climatiques, ainsi que l'imposition de normes sociales excluantes. Par ailleurs, les récits recueillis montrent que l'expérience du déplacement est souvent socialement construite comme un processus de "désappartenance", où la terre natale cesse d'être perçue comme un lieu sûr, et l'exil devient une norme intériorisée.

L'étude souligne la nécessité d'une approche intégrée des déplacements internes, combinant compréhension des rapports de force (géopolitique) et analyse des représentations sociales (constructivisme). Elle appelle à des politiques de prévention fondées sur la revalorisation des appartenances locales, la gouvernance inclusive, et la justice territoriale. La cartographie proposée permet de visualiser les zones à haute vulnérabilité et de repenser l'action publique en amont des crises.

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**Mots clés :** Déplacement interne - Afrique centrale - Causes structurelles - Exil forcé - Vulnérabilité territoriale

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## **Between Homeland and Forced Exile: Mapping the Structural Causes of Internal Displacement in Central Africa (2015-2025)**

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### **Abstract**

Central Africa is facing a surge in internal displacement, often perceived as an immediate reaction to armed violence. However, a deeper analysis reveals more profound, structural, and long-standing causes. This study aims to map these causes through a dual lens: geopolitical and phenomenological constructivist. The goal is to move beyond an event-based interpretation to examine the structural logics and social constructions that underpin forced exile in the region.

The methodological approach relies on a geopolitical analysis of power relations and territorial dynamics at the level of affected states and localities, using François Thuail's method. This is complemented by a phenomenological constructivist perspective inspired by the works of Peter Berger and Thomas Luckmann to understand how displacement is experienced, interpreted, and institutionalized by social actors. The study uses triangulated data drawn from institutional reports (IOM, UNHCR), academic works, testimonies of internally displaced persons, and interviews with

humanitarian actors across four countries: Cameroon, Chad, the Central African Republic, and the Democratic Republic of Congo.

The findings reveal that internal displacement is the result of a cluster of structural causes: conflicts over land and natural resources, political marginalization, militarization of rural areas, climate-related disasters, and the imposition of exclusionary social norms. Furthermore, the collected narratives show that the experience of displacement is often socially constructed as a process of “unbelonging,” where the homeland ceases to be perceived as safe, and exile becomes an internalized norm.

The study highlights the need for an integrated approach to internal displacement, combining an understanding of power relations (geopolitics) with an analysis of social representations (constructivism). It calls for prevention policies based on the reevaluation of local belonging, inclusive governance, and territorial justice. The proposed mapping makes it possible to visualize high-vulnerability zones and rethink public action upstream of crises.

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**Keywords:** Internal displacement – Central Africa – Structural causes – Forced exile – Territorial vulnerability

## Introduction

Les routes poussiéreuses d’Afrique centrale, marquées par des empreintes d’exode, racontent une tragédie silencieuse qui se répète au fil des années et des frontières. Au-delà des chiffres froids, les déplacements internes témoignent d’un effritement progressif des repères d’appartenance, d’un arrachement contraint de populations entières à leurs terres, et d’une spirale d’incertitudes qui transforme des citoyens enracinés en voyageurs sans destination sûre. Ces mouvements forcés, trop souvent abordés sous l’angle événementiel des crises armées, s’enracinent en réalité dans une configuration complexe de facteurs structurels profonds (IDMC, 2024), que cette étude se propose de mettre en lumière.

Dans le cœur battant du continent africain, la région d’Afrique centrale cristallise une instabilité chronique, nourrie par des conflits multiformes, des rivalités territoriales, des logiques d’exclusion politique, des mutations environnementales et des inégalités socio-économiques (Yogo, 2015). Le déplacement interne y devient une réponse récurrente, parfois presque attendue, à la pression insoutenable des structures sociales et politiques effondrées (Alfredson, 2002). Pourtant, derrière les événements visibles, attaques, razzias, affrontements, violences ciblées, se cache une cartographie plus vaste : celle des fragilités endogènes, des conflits de longue durée, des processus de désappartenance identitaire, et des constructions sociales de l’exil.

C'est précisément cette dimension souterraine que ce travail ambitionne d'explorer. Il s'agit de réintroduire la profondeur dans l'analyse du déplacement forcé, en articulant les dynamiques géopolitiques avec les représentations sociales, et en croisant les approches structurelles avec les vécus individuels et collectifs. L'exil n'est pas seulement un mouvement dans l'espace ; il est aussi un mouvement dans l'être, une reconfiguration du rapport à soi, à l'autre, au territoire et à la communauté (Noumbou, 2025). L'intensification des déplacements internes en Afrique centrale n'est pas un phénomène nouveau. Toutefois, leur évolution récente, tant en nombre qu'en configuration, appelle une lecture renouvelée (IDMC, 2024). Alors que les organisations humanitaires documentent l'urgence humanitaire, les recherches académiques peinent encore à intégrer de manière systématique les dimensions structurelles et subjectives de ces mobilités contraintes. Le besoin se fait sentir d'un cadre d'analyse qui dépasse la lecture conjoncturelle pour embrasser les déterminants historiques, politiques, territoriaux et symboliques des déplacements internes.

Par ailleurs, la persistance des conflits et l'inefficacité des mécanismes de prévention révèlent l'incapacité des États et des partenaires internationaux à agir en amont. Cette impuissance stratégique est en partie liée à l'ignorance ou à la minimisation des causes structurelles des déplacements, souvent reléguées à la marge dans les diagnostics et les politiques (Yogo, 2015). Dès lors, une cartographie rigoureuse et critique des causes s'impose comme une exigence intellectuelle, politique et éthique (Ntuda, 2017).

La question centrale qui sous-tend cette étude peut être formulée comme suit : Quels sont les facteurs structurels qui favorisent le déplacement interne en Afrique centrale, et comment ces facteurs interagissent-ils avec les représentations sociales pour institutionnaliser l'exil forcé comme norme ? L'hypothèse qui guide ce travail est que le déplacement interne en Afrique centrale ne peut être compris de manière exhaustive sans une lecture croisée entre les rapports de force géopolitiques et les constructions sociales du déracinement. Les dynamiques territoriales et les conflits latents, conjugués à la marginalisation historique de certaines communautés, produisent un terreau propice à l'exode forcé. Parallèlement, les récits, les dispositifs humanitaires et les politiques étatiques contribuent à instituer et à normaliser le déplacement comme réponse systémique à la violence et à l'exclusion.

Les objectifs de cette étude sont multiples : il s'agit d'abord d'identifier et d'analyser les causes structurelles du déplacement interne dans quatre pays d'Afrique centrale, le Cameroun, le Tchad, la République centrafricaine et la République démocratique du Congo, puis de comprendre comment ces causes se combinent avec les logiques de domination territoriale et la défaillance des structures de gouvernance pour produire des dynamiques durables d'exil forcé. L'étude vise également à explorer, à travers une

approche constructiviste, la manière dont les déplacés internes vivent, interprètent et racontent leur propre expérience de l'exil, afin de mettre en lumière les représentations sociales qui sous-tendent ces mobilités contraintes. Elle ambitionne en outre de proposer une cartographie analytique des zones de vulnérabilité et des mécanismes d'institutionnalisation du déplacement, pour enfin formuler des recommandations concrètes en faveur d'une gouvernance territoriale plus inclusive et d'une prévention structurelle des crises à venir.

Pour répondre à cette problématique complexe, l'étude mobilise une double approche méthodologique, à la fois géopolitique et constructiviste phénoménologique. Sur le plan théorique, elle s'appuie sur les apports du constructivisme phénoménologique développés par Peter Berger et Thomas Luckmann (1996), qui considèrent que la réalité sociale est le produit d'un processus continu de construction, d'objectivation et d'institutionnalisation. Appliquée au cas des déplacés internes, cette théorie permet de comprendre comment l'exil devient une norme intériorisée, un cadre d'expérience, une catégorie sociale produite par les interactions entre acteurs.

D'un point de vue méthodologique, le travail adopte une lecture géopolitique inspirée de François Thual (1996), qui met l'accent sur les jeux d'échelle, les dynamiques de pouvoir et les configurations territoriales. Cette méthode permet de décrypter les rapports de force à l'œuvre entre États, groupes armés, multinationales extractives, et acteurs communautaires, dans une région où le territoire est à la fois enjeu, ressource et champ de bataille. L'analyse repose sur une triangulation de sources : rapports institutionnels (OIM, HCR, ACAPS), études scientifiques, récits de déplacés recueillis lors d'entretiens semi-directifs, et observations de terrain dans des zones particulièrement touchées (Nord Cameroun, Est Tchad, Ouham en RCA, Kasai et Ituri en RDC).

Géographiquement, l'étude se concentre sur quatre États emblématiques d'Afrique centrale (Pelissier, 1995) : le Cameroun, le Tchad, la République centrafricaine (RCA) et la République démocratique du Congo (RDC). Ces pays présentent des configurations variées, mais partagent des traits communs : faiblesse de l'État, conflits prolongés, militarisation des zones rurales, pressions sur les terres et mobilité forcée (Yogo, 2015). D'un point de vue temporel, l'analyse couvre la période 2015-2025, une décennie marquée par une recrudescence notable des déplacements internes, tant en ampleur qu'en complexité.

Le choix de l'année 2015 s'explique par le basculement dans une nouvelle séquence historique : en RCA, les tensions post-Séléka continuent à fragmenter le territoire malgré les accords de Bangui de 2015 ; au Cameroun, cette année marque la montée en puissance des attaques de Boko Haram à l'Extrême-Nord, provoquant les premiers déplacements massifs ; en RDC,

c'est le déploiement graduel des milices locales comme les Maï-Maï au Nord-Kivu qui intensifie la crise humanitaire ; au Tchad, les répercussions du conflit nigérian et la pression sécuritaire dans le bassin du Lac Tchad commencent à générer des flux de déplacés internes.

L'année 2025, quant à elle, constitue une borne prospective, permettant d'inscrire l'analyse dans une temporalité actualisée et d'anticiper les tendances durables du phénomène. À titre d'illustration, le site de l'OCHA (ReliefWeb) signale qu'en décembre 2023, la RDC comptait plus de 6,9 millions de déplacés internes, en majorité dans les provinces du Nord Kivu, de l'Ituri et du Sud-Kivu (AP News, 2023) ; le Cameroun en recensait environ 1,1 million, (IOM & DTM, 2023) principalement dans les régions du Nord-Ouest, Sud-Ouest et Extrême-Nord (SIHMA, 2023), tandis que la RCA totalisait plus de 500 000 déplacés internes selon les données du HCR. Le Tchad, de son côté, faisait face à une montée récente des déplacements internes dans la région du Lac, exacerbée par l'insécurité chronique et la récurrence des conflits intercommunautaires (Cameroon United Nations, 2023). Conceptuellement, le terme "déplacement interne" est ici entendu dans une acception élargie, qui dépasse la seule mobilité spatiale imposée pour intégrer la perte d'ancrage symbolique, la désaffiliation identitaire, la précarisation statutaire et la désagrégation des liens sociaux dans les territoires d'accueil ou d'errance. Cette lecture permet de mieux saisir les dynamiques profondes à l'œuvre dans les trajectoires des déplacés, au-delà des statistiques humanitaires.

L'étude se déploiera en deux grandes parties complémentaires. La première partie s'intitule « Les dynamiques géopolitiques du déplacement interne : entre pressions structurelles et logiques de domination ». Elle analyse l'emboîtement des conflits à différentes échelles, la militarisation des espaces périphériques, la compétition pour le contrôle des ressources, et l'effondrement de la gouvernance locale. Elle met en lumière les causes systémiques qui transforment certaines zones en foyers permanents de déplacement.

La seconde partie, intitulée « Représentations sociales et vécu de l'exil : une lecture constructiviste des déplacements », aborde l'exil comme expérience sociale. Elle explore comment les individus et les communautés déplacés donnent sens à leur mobilité forcée ? comment l'exil devient-il un récit partagé, une norme sociale, voire un destin ? Elle analyse également le rôle des ONG, des médias et des politiques publiques dans l'institutionnalisation du déplacement.

Enfin, la conclusion revient sur les résultats majeurs de la recherche, en soulignant la complémentarité entre la lecture géopolitique et la lecture phénoménologique. Elle propose des perspectives d'approfondissement (études comparatives, analyses longitudinales) et formule des

recommandations politiques pour une action préventive, inclusive et centrée sur la justice territoriale. À l'heure où l'Afrique centrale se débat entre instabilité chronique et espoirs de résilience, comprendre les causes structurelles des déplacements internes devient une urgence analytique et politique. Cette étude entend participer à cet effort, en mettant en lumière ce qui reste souvent invisible : les racines profondes du déracinement.

## LES DYNAMIQUES GÉOPOLITIQUES DU DÉPLACEMENT INTERNE : ENTRE PRESSIONS STRUCTURELLES ET LOGIQUES DE DOMINATION

Si les déplacements internes en Afrique centrale sont souvent imputés à des violences conjoncturelles, une lecture géopolitique rigoureuse révèle l'existence de dynamiques plus profondes liées aux rapports de pouvoir, à la fragmentation territoriale et à l'effondrement de la gouvernance. Cette première partie s'attache à décrypter ces pressions structurelles et les logiques de domination qui, à différentes échelles, transforment certaines régions en foyers chroniques d'exil forcé. Elle s'ouvre par une analyse de l'emboîtement des conflits et de la militarisation de l'espace rural (A), avant de mettre en lumière les facteurs structurels aggravant les vulnérabilités territoriales (B).

## L'EMBOÏTEMENT DES ÉCHELLES DE CONFLITS EN AFRIQUE CENTRALE

Les conflits en Afrique centrale ne relèvent pas uniquement de dynamiques locales ; ils s'inscrivent dans une articulation complexe entre enjeux nationaux, transfrontaliers et internationaux. Cette section explore d'abord comment la fragmentation des États et la compétition pour le contrôle territorial alimentent les déplacements internes (1), avant d'examiner la militarisation des espaces ruraux et la prolifération des acteurs armés non étatiques comme vecteurs majeurs d'instabilité (2).

### *La fragmentation des États et la concurrence pour le contrôle territorial*

La fragmentation des États en Afrique centrale et la concurrence persistante pour le contrôle territorial constituent l'un des principaux ressorts structurels du déplacement interne, souvent éclipsés par l'attention portée aux seuls conflits armés visibles (IDMC, 2024). En République démocratique du Congo (RDC), en République centrafricaine (RCA) et dans le Nord du Cameroun, cette fragmentation s'exprime par l'effritement des institutions étatiques, l'incapacité de l'État à exercer pleinement la souveraineté sur l'ensemble du territoire, et l'émergence de pouvoirs concurrents qui imposent des normes, des loyautés et des rapports de force propres (Mandjem, 2010). Cette réalité est le produit d'une histoire coloniale inachevée, d'une décolonisation précipitée, d'une centralisation excessive du pouvoir, mais

aussi de décennies de gouvernance clientéliste et extractiviste qui ont délité les liens entre centre et périphéries (Akindès, 1996). Loin de se réduire à une absence de l'État, il s'agit plutôt d'une présence défaillante, instrumentale, souvent vécue par les populations comme coercitive plutôt que protectrice.

Dans la région orientale de la RDC, par exemple, la multiplicité des groupes armés locaux, la présence d'acteurs étrangers et les complicités avec certains segments des élites politiques ont transformé de vastes zones rurales en espaces de pouvoir fragmentés (Mandjem, 2010). Ces territoires échappent en grande partie au contrôle de Kinshasa et fonctionnent selon des logiques autonomes où la légitimité se gagne par la force, l'accès aux ressources minières ou l'exploitation de clivages identitaires. Cette concurrence pour le contrôle territorial ne se joue pas seulement sur le terrain militaire, mais aussi à travers l'imposition de redevances, la régulation du commerce, ou encore le contrôle des routes de transit (Chouala, 1999). Dans ce contexte, les populations civiles sont souvent perçues comme des ressources à exploiter ou comme des menaces à neutraliser. Le déplacement devient alors une stratégie de survie, un moyen d'échapper à la violence directe, mais aussi à l'insécurité latente générée par la fluctuation constante des allégeances et des pouvoirs (Forced Migration Review, 2019).

En République centrafricaine, cette fragmentation a atteint un niveau particulièrement critique avec la partition de facto du pays depuis la crise de 2013. Le pouvoir central, bien que reconnu internationalement, peine à s'imposer en dehors de Bangui, tandis que des groupes armés, anciens membres de la *Séléka*, milices *anti-balaka* ou formations hybrides, exercent une autorité alternative sur une large partie du territoire (Vircoulon, 2020). Ces groupes ne se contentent pas d'occuper l'espace : ils redéfinissent les hiérarchies sociales, imposent des lois coutumières réinterprétées, taxent les populations, organisent l'accès à la terre, aux marchés et à la mobilité. Ils incarnent une gouvernance parallèle qui s'insère dans les failles d'un État affaibli, corrompu et souvent illisible pour les communautés rurales (Vircoulon, 2020). Dans un tel cadre, les déplacements internes ne relèvent pas uniquement d'un contexte de guerre ouverte, mais aussi d'une recomposition territoriale brutale où les appartenances sont redéfinies, parfois de manière exclusive ou violente, forçant ainsi certains groupes à fuir leur région d'origine sous peine d'être stigmatisés ou éliminés.

Le Cameroun offre, à cet égard, un cas singulier mais symptomatique ((Meva'a Abomo et al., 2013). La présence de *Boko Haram* dans la région de l'Extrême-Nord a non seulement généré une série d'attaques meurtrières, mais aussi mis en lumière la faiblesse de l'emprise de l'État sur certaines zones frontalières (International crisis group, 2018). Ici, la fragmentation ne prend pas la forme d'un éclatement institutionnel complet, mais d'une désarticulation fonctionnelle : l'État y est présent par intermittence, souvent

par la voie militaire, mais sans capacité réelle de médiation sociale ou de développement (International Crisis Group, 2016). Ce vide est comblé par des acteurs religieux, traditionnels, voire criminels, qui redéfinissent les équilibres locaux. Dans un contexte de pauvreté extrême, de vulnérabilité climatique et de tensions foncières, cette instabilité territoriale alimente les mobilités forcées, les individus et familles étant pris entre l'arbitraire des groupes armés et l'inefficacité des protections étatiques (International Crisis Group, 2016).

Dans chacun de ces cas, la fragmentation de l'État se traduit par la perte progressive de la fonction première de l'autorité publique : celle de garantir la sécurité, la justice et la prévisibilité (Gaulme, 2011). Ce déficit d'État favorise la montée en puissance d'une logique de compétition territoriale dans laquelle les groupes armés, les autorités traditionnelles, les multinationales extractives ou même certaines agences internationales deviennent des acteurs centraux de la régulation du territoire (Gaulme, 2011). Cette compétition engendre une reconfiguration permanente des lignes de front, une instabilité chronique des appartenances et une incertitude constante quant à l'avenir. Elle produit un climat d'insécurité structurelle, qui pousse les individus à fuir non pas seulement pour échapper à un danger immédiat, mais pour tenter de reconstruire ailleurs des formes minimales de stabilité.

Ainsi, le déplacement interne apparaît comme le symptôme d'une souveraineté fragmentée, d'une territorialité disputée, et d'une crise profonde du contrat social. Il révèle les failles de l'État postcolonial africain, incapable de garantir un maillage équitable et durable de la puissance publique (Zartman, 1995). Dans ce contexte, la carte du déplacement ne reflète pas seulement les zones de conflit armé ; elle épouse celle des zones d'abandon, de domination concurrente, d'exploitation silencieuse et de déliaison symbolique entre la terre et les habitants (Vircoulon, 2020). Pour penser des réponses efficaces à la crise des déplacés internes, il est donc indispensable de replacer la question du territoire, au sens politique, social et symbolique, au cœur des analyses et des politiques publiques. Car là où l'État se délite, les chemins de l'exil s'élargissent.

### *La militarisation des espaces ruraux et la prolifération des acteurs armés non étatiques*

La militarisation progressive des espaces ruraux en Afrique centrale constitue l'un des visages les plus inquiétants de la crise du déplacement interne (Issa, 2010). Loin d'être une conséquence fortuite de conflits localisés, cette dynamique s'inscrit dans un processus plus large de territorialisation de la violence, où le champ rural cesse d'être un simple espace périphérique pour devenir un théâtre stratégique d'affrontement, de contrôle social et d'appropriation économique. Cette transformation du rural en zone de combat et de pouvoir participe non seulement à la production du déplacement forcé,

mais elle en altère aussi profondément la nature, en brisant les liens communautaires, en détruisant les économies vivrières et en refaçonant les hiérarchies locales. C'est une configuration où la guerre se greffe sur le quotidien, où la peur devient une modalité d'existence et où l'exode s'impose comme une stratégie de survie face à l'omniprésence de la violence (Issa, 2010).

Dans les régions les plus fragilisées du Cameroun septentrional, de l'Est tchadien, de la République centrafricaine ou de la RDC, l'espace rural ne peut plus être conçu comme une simple périphérie négligée par l'État ; il est devenu une zone d'enjeux et d'affirmation concurrente de souverainetés armées (Issa, 2006). Cette transformation est d'abord rendue possible par le désengagement progressif de l'État, dont la présence est désormais fragmentaire, intermittente, et souvent réduite à l'intervention sécuritaire ponctuelle. En lieu et place de l'administration, de la justice et des services sociaux, émergent des groupes armés non étatiques qui investissent ces espaces pour y installer leur ordre, imposer leurs règles, prélever des ressources et contrôler les populations (Issa, 2006). Ces groupes ne sont pas de simples bandits ou irréguliers : ils se construisent comme des pouvoirs locaux, ancrés dans des réseaux de légitimité, parfois communautaires, parfois religieux, souvent transnationaux. Ils se nourrissent du ressentiment, de la pauvreté, des conflits fonciers, et trouvent dans l'absence de l'État un vide propice à leur enracinement.

La présence militaire dans ces espaces n'est pas seulement celle des forces régulières déployées pour restaurer l'ordre. Elle inclut un ensemble hétérogène d'acteurs armés : milices communautaires, groupes rebelles, bandits organisés, mercenaires, contingents étrangers, gardes privées d'entreprises extractives, ou encore mouvements religieux radicalisés (IPIS, 2018). Cette prolifération d'acteurs armés engendre une opacité du pouvoir, une volatilité des alliances, et une instabilité permanente des rapports de domination. Elle rend l'espace rural illisible pour les populations qui y vivent, constamment confrontées à des régimes multiples d'autorité, de taxation et de répression (IPIS, 2018). Dans ce contexte, la violence n'est pas visible ni spectaculaire ; elle se déploie dans la quotidienneté, à travers l'humiliation, l'extorsion, le contrôle des déplacements, la surveillance des interactions, l'appropriation des récoltes, ou encore l'imposition de codes de conduite sous peine de sanction brutale.

Cette militarisation modifie profondément les équilibres socio-économiques locaux. L'agriculture de subsistance est abandonnée ou fortement réduite, les marchés hebdomadaires se tarissent, les déplacements entre villages deviennent risqués, et les formes traditionnelles d'entraide et de solidarité sont affaiblies par la méfiance généralisée (Tsala, 2024). Les jeunes, sans emploi ni perspective, sont recrutés de gré ou de force dans ces groupes

armés, transformant ainsi leur rapport au territoire et à la communauté (Owona, 2017). Les femmes, quant à elles, sont exposées à des violences sexuelles systématiques, utilisées comme armes de guerre ou comme instruments de domination symbolique (Déborah, 2012). Les chefs traditionnels, autrefois piliers de la régulation sociale, sont souvent dépossédés de leur autorité, instrumentalisés ou éliminés s'ils résistent aux nouvelles forces en place. Cette recomposition brutale de l'ordre rural provoque une désarticulation des identités locales, une perte de repères symboliques, et un déracinement profond.

Le déplacement interne, dans ce contexte, n'est plus seulement une fuite devant un danger imminent. Il devient une réponse à l'usure continue de la possibilité de vivre, une réaction à l'érosion des liens sociaux, à l'impossibilité d'anticiper, de projeter et de reconstruire. Les populations fuient non pas un affrontement ponctuel, mais une logique d'occupation, d'exploitation et d'insécurité chronique (Forced Migration Review, 2019). Ce déplacement est souvent cyclique, fragmenté, peu visible, mais, il laisse des traces durables sur les territoires et sur les subjectivités. Il n'y a plus de retour possible au village tant que la terre est militarisée, tant que les champs sont minés ou occupés, tant que le silence imposé par les armes prévaut sur la parole communautaire.

La militarisation des espaces ruraux révèle ainsi l'ampleur de la crise du modèle étatique postcolonial en Afrique centrale (Zartman, 1995). Elle illustre le glissement d'un État protecteur vers une constellation d'autorités armées concurrentes, où le monopole de la violence est privatisé, localisé, négocié au gré des rapports de force (Vircoulon, 2020). Elle interroge aussi la capacité des réponses humanitaires à adresser des situations où le déplacement est produit non pas par un événement, mais par un système. Face à cette réalité, toute politique de prévention des déplacements internes doit impérativement intégrer une réflexion sur la démilitarisation des territoires, la restauration d'une présence publique légitime et la reconstruction d'un lien de confiance entre les communautés rurales et les institutions (Sindjoun, 2010). Sans cela, les espaces ruraux resteront des foyers latents de mobilité contrainte, des zones de silence et de souffrance, où la terre cesse d'être nourricière pour devenir théâtre d'exil.

## LES FACTEURS STRUCTURELS AGGRAVANTS LES VULNÉRABILITÉS TERRITORIALES

Au-delà des affrontements visibles, certains processus socio-économiques et politiques contribuent à une vulnérabilité chronique des territoires. Cette section s'intéresse, d'une part, à l'accaparement des terres et à l'extractivisme qui marginalisent durablement les populations locales, et

d'autre part, à l'effondrement des structures locales de gouvernance et à la montée d'une insécurité multidimensionnelle qui accélèrent l'exil forcé.

### *Accaparement des terres, extractivisme et marginalisation des populations locales*

Dans le contexte des déplacements internes en Afrique centrale, l'accaparement des terres et l'essor des logiques extractivistes participent activement à la marginalisation des populations locales, en transformant les territoires ruraux en espaces de dépossession et de vulnérabilité structurelle (Caouette, 2016). Derrière la façade du développement économique ou de l'investissement étranger, s'installe une reconfiguration silencieuse des rapports fonciers, souvent imposée, rarement négociée, et presque asymétrique. Ce processus n'est pas un épiphénomène isolé, mais une dynamique profondément enracinée dans les héritages coloniaux, les politiques néolibérales des États postcoloniaux, et les nouvelles géopolitiques globales des ressources (Caouette, 2016). Il constitue une cause majeure, bien que souvent sous-estimée, des déplacements forcés de populations rurales, jetées hors de leurs terres non pas par des conflits armés au sens strict, mais par des formes insidieuses de violence économique, juridique et politique.

Le foncier, en Afrique centrale, n'est pas un simple bien économique. Il est au cœur des systèmes d'appartenance, d'identité, de subsistance et de mémoire (Zogo Nkada, 2011). Il structure les communautés rurales dans leur rapport au monde, aux ancêtres, aux générations futures. La terre, dans la matérialité comme dans la charge symbolique, est le socle de la stabilité sociale (Mvondo, 2022). L'accaparement ne représente donc pas seulement une perte matérielle ; il s'apparente à une mutilation identitaire, à une rupture des continuités historiques et des solidarités locales. Lorsque des terres sont cédées à des entreprises agro-industrielles ou minières, souvent avec l'aval tacite ou explicite de l'État, les populations concernées ne sont pas simplement déplacées (Evers, Seagle & Krijtenburg, 2014). Elles sont déracinées de leur matrice territoriale, désaffiliées de leurs droits coutumiers, réduites au statut de résidents illégitimes sur un sol qu'elles ont pourtant cultivé pendant des générations.

L'extractivisme, en tant que logique économique, amplifie ce phénomène en reconfigurant les priorités étatiques autour de l'exploitation intensive des ressources naturelles (Voundi, 2021). Pétrole, bois, or, coltan, diamants, terres agricoles : autant de ressources qui attirent convoitises et investissements, souvent dans des zones habitées par des communautés rurales aux droits fonciers précaires. Ces projets, soutenus par des discours de modernisation, s'accompagnent de mécanismes juridiques opaques, de contrats inaccessibles, de compensations inégales voire inexistantes, et d'un déni systématique des formes de propriété non formalisées (Voundi, 2021).

Les autorités locales, souvent cooptées ou mises sous pression, jouent un rôle ambivalent, parfois complice, dans l'expropriation silencieuse des terres communautaires. Loin de générer du développement inclusif, ces investissements conduisent à la concentration foncière, à l'érosion de l'agriculture paysanne, à l'insécurité alimentaire, et à une précarisation accélérée des conditions de vie des habitants (Blaikie, 1985).

La marginalisation des populations locales est également renforcée par l'absence de mécanismes de protection sociale ou de justice foncière efficaces (Blaikie, 1985). Dans la plupart des pays d'Afrique centrale, les systèmes juridiques ignorent ou minimisent les droits coutumiers, au profit de titres fonciers formels que les populations rurales n'ont ni les moyens ni les connaissances d'obtenir. Cette asymétrie juridique consacre une hiérarchie foncière profondément inégalitaire, où les pauvres sont dépossédés non pas par la force armée, mais par la légalité administrative (Thomas, 2013). Le déplacement interne devient alors le point d'aboutissement d'une série d'exclusions invisibles, d'injustices accumulées, de violences lentes mais irréversibles. Il ne prend pas la forme d'un départ massif ; il peut s'agir de déplacements progressifs, d'exodes saisonniers, ou d'une errance latente autour de terres perdues, avec l'espoir illusoire d'un retour ou d'une régularisation.

L'extractivisme militarisé, souvent observable dans les zones minières du *Kasai* en RDC ou de l'*Ouham* en RCA, ajoute une couche supplémentaire à ce processus. Là où l'exploitation des ressources s'accompagne de la présence de groupes armés, de milices privées ou de forces de sécurité corrompues, les populations locales se retrouvent dans une triple impasse : dépossédées de leurs terres, menacées par la violence, et exclues des bénéfices économiques de ces projets (Jacquemot, 2025). Cette dynamique contribue à la production d'un espace rural fracturé, dominé par des logiques d'accumulation prédatrice et de contrôle répressif, où l'habitant devient un obstacle à éliminer ou à neutraliser (Jacquemot, 2025). Le déplacement forcé, dans ce contexte, ne résulte pas d'un choc soudain, mais d'une pression constante, d'une asphyxie sociale et économique qui pousse lentement mais sûrement à l'exode.

Au fond, l'accaparement des terres et l'expansion extractiviste doivent être compris non seulement comme des facteurs économiques ou environnementaux, mais comme des instruments de marginalisation politique (Voundi, 2021). Ils participent à la désarticulation du tissu communautaire, à l'effacement des voix locales dans la gouvernance territoriale, et à la fabrication de territoires sans habitants légitimes. Le déplacement interne, loin d'être un dommage collatéral, devient une finalité tacite de ces dynamiques, une condition de réalisation des projets, un mode de « nettoyage » silencieux des espaces à exploiter (Jacquemot, 2025). Face à cette réalité, une réponse

politique à la crise des déplacés internes ne saurait faire l'économie d'une réforme foncière profonde, d'une reconnaissance des droits coutumiers, et d'une remise en question radicale du modèle extractiviste dominant. Car tant que la terre restera un objet de prédation plutôt qu'un bien commun à protéger, les chemins de l'exil resteront tracés dans la poussière des campagnes africaines.

### *Effondrement de la gouvernance locale et insécurité multidimensionnelle*

L'effondrement de la gouvernance locale en Afrique centrale constitue un facteur déterminant dans la production et la reproduction des déplacements internes (Assana, 2025). Il ne s'agit pas simplement de la faiblesse des structures administratives de proximité ou du manque de ressources des collectivités territoriales, mais d'un effritement profond du contrat social à l'échelle locale, qui entraîne une insécurité multidimensionnelle affectant à la fois l'ordre, la justice, les services de base, les dynamiques sociales et les rapports au territoire (Bertrand & Moquay, 2004). Là où la gouvernance locale devait incarner la proximité, la médiation et la continuité de l'État dans les espaces ruraux et périphériques, elle s'est souvent réduite à un assemblage d'institutions formelles sans portée, de figures traditionnelles désarticulées, ou d'agents publics dépourvus de toute légitimité réelle auprès des communautés (Bertrand & Moquay, 2004). Ce vide de régulation est rapidement occupé par d'autres formes de pouvoir, armé, religieux, économique, dont les logiques répondent rarement aux besoins de protection et de justice des populations.

La gouvernance locale, quand elle est effective, devrait offrir aux citoyens un espace de dialogue, de négociation des différends, d'accès aux droits, de prévisibilité des décisions (Olivier de Sardan, 2009). Or, dans de nombreuses régions du Tchad, de la République centrafricaine, de la RDC ou du Cameroun, ces fonctions sont devenues inexistantes ou résiduelles. Les mairies ou préfectures, lorsqu'elles ne sont pas simplement absentes, se trouvent isolées, réduites à une présence symbolique, sans budget, sans agents compétents, sans capacité de médiation entre les communautés (Nodem, Bamenjo & Schwartz, 2012). Les mécanismes de gestion foncière sont défaillants ou corrompus, les dispositifs de sécurité sont détournés à des fins privées, les services sociaux essentiels (écoles, centres de santé, justice de proximité) sont désorganisés ou absents. Ce retrait progressif mais massif des fonctions étatiques au niveau local a favorisé la montée de l'arbitraire, des injustices non résolues, des frustrations accumulées, et donc, inévitablement, des tensions latentes qui se transforment en crises ouvertes (Nodem, Bamenjo & Schwartz, 2012).

Dans ce contexte, l'insécurité ne peut être comprise uniquement comme le risque de violence armée. Elle devient une condition structurelle, diffuse et multiforme. Elle prend la forme de l'insécurité alimentaire, due à la

désorganisation des systèmes de production et de commercialisation agricoles (Voundi, Mbevo Fendoung & Essigue Emossi, 2019). Elle se manifeste dans l'insécurité juridique, lorsque les populations ne savent plus à quelle autorité s'adresser pour faire valoir leurs droits. Elle s'exprime dans l'insécurité identitaire, quand les communautés minoritaires, déplacées ou marginalisées se sentent exclues de toute reconnaissance institutionnelle. Elle devient insécurité environnementale lorsque les mécanismes de gestion des ressources naturelles se sont effondrés et que les populations ne peuvent plus faire face aux aléas climatiques, à la sécheresse, à l'érosion ou à la rareté de l'eau (Voundi, Mbevo Fendoung & Essigue Emossi, 2019). Enfin, elle est également insécurité sociale, lorsque le tissu communautaire est déchiré par des conflits interethniques, interreligieux ou intergénérationnels que plus aucune autorité légitime n'est en mesure d'arbitrer.

Ce cumul d'insécurités, alimenté par la défaillance de la gouvernance locale, crée un terreau propice à la mobilité forcée. Les populations ne fuient pas uniquement les balles ou les machettes, elles fuient un environnement qui ne garantit plus aucune stabilité, aucune lisibilité, aucun horizon. Dans certains cas, le départ est la seule alternative à l'injustice persistante, à l'humiliation quotidienne, à l'impossibilité de vivre dignement (Komassi, 2017). Le déplacement devient alors une stratégie adaptative, un dernier recours face à un système institutionnel qui a cessé d'exister à leurs yeux. Il devient aussi un moyen de contester, dans le silence, un ordre injuste ou défaillant. En quittant leur village, leur canton, leur commune, les déplacés expriment un refus implicite de continuer à subir l'insoutenable (Komassi, 2017). Mais, ce départ n'est jamais anodin : il s'accompagne de ruptures affectives, de pertes de repères, d'une réorganisation forcée des solidarités et d'une précarité souvent aggravée dans les lieux d'accueil, eux-mêmes peu préparés à gérer ces flux.

Par ailleurs, la gouvernance locale en crise ouvre la voie à des recompositions autoritaires et clientélistes. Les acteurs qui émergent pour combler le vide institutionnel, chefs traditionnels, leaders religieux, entrepreneurs de la violence, ONG locales, peuvent, dans certains cas, jouer un rôle positif de stabilisation (Leblanc, 2007). Mais, ils peuvent également reproduire, voire aggraver, les logiques d'exclusion, de corruption ou de domination, en s'inscrivant dans des dynamiques de pouvoir concurrentes, marquées par la recherche de contrôle territorial ou de captation des ressources. L'espace local devient alors un champ de compétition, où la sécurité, l'accès aux biens, et la mobilité sont conditionnés par l'appartenance communautaire, les allégeances politiques ou les capacités financières (Leblanc, 2007). Cette situation entretient un climat d'instabilité chronique, où la norme n'est plus la régulation mais l'exception, où la loi est remplacée par l'interprétation circonstancielle de rapports de force.

Ainsi, l'effondrement de la gouvernance locale ne doit pas être perçu comme une défaillance périphérique du système étatique, mais comme un symptôme majeur de la crise structurelle des États en Afrique centrale. Il révèle l'incapacité des institutions à irriguer l'ensemble du territoire national, à garantir l'égalité d'accès aux droits, et à produire un sentiment d'appartenance partagé (Leblanc, 2007). Face à cette déliquescence, le déplacement interne apparaît non pas comme un événement ponctuel, mais comme une trajectoire sociale de plus en plus fréquente, presque normalisée. Restaurer la gouvernance locale n'est donc pas seulement un impératif technique ou administratif : c'est un enjeu de justice, de paix durable et de réconciliation territoriale. Sans cette restauration, les populations continuent à fuir des espaces devenus hostiles non par la guerre seule, mais par le vide institutionnel qui rend toute vie digne et stable impossible.

## REPRÉSENTATIONS SOCIALES ET VÉCU DE L'EXIL : UNE LECTURE CONSTRUCTIVISTE DES DÉPLACEMENTS

Les déplacements internes ne peuvent être compris uniquement comme des mouvements physiques. Ils constituent également des processus sociaux, identitaires et symboliques. Cette seconde partie adopte une perspective constructiviste pour mettre en évidence la manière dont les déplacés perçoivent, vivent et donnent sens à leur exil. Elle explore d'abord les dynamiques de désaffiliation identitaire et de perte d'ancrage territorial (A), avant d'analyser les mécanismes par lesquels le déplacement est institutionnalisé et reproduit au sein des dispositifs humanitaires et politiques (B).

## LE DEPLACEMENT COMME PROCESSUS DE DÉSAFFILIATION IDENTITAIRE

L'exil ne se réduit pas à la rupture géographique avec la terre natale ; il s'accompagne d'un effritement progressif des repères identitaires. Cette section examine, dans un premier temps, comment la perte du territoire ancestral entraîne une altération du sentiment d'appartenance et une rupture symbolique profonde (1), puis comment l'exil en vient à être intériorisé comme une norme sociale, voire une destinée collective, dans les représentations des déplacés (2).

### *Perte de la terre natale : altération de l'ancrage spatial et symbolique*

Dans les trajectoires de déplacement interne en Afrique centrale, la perte de la terre natale constitue bien plus qu'un simple changement géographique ou une rupture spatiale. Elle engage un bouleversement profond du rapport à soi, au monde et aux autres, car l'ancrage territorial, en particulier dans les sociétés rurales africaines, ne relève pas uniquement de la fonction

résidentielle ou économique du sol (Amnesty International, 2014). Il renvoie à une dimension identitaire, ontologique et symbolique qui articule la mémoire collective, l'héritage ancestral et les représentations de la continuité communautaire. La terre n'est pas seulement l'espace sur lequel on habite ; elle est le lieu depuis lequel on existe, celui qui structure les récits fondateurs, les formes de filiation, les modalités d'appartenance et les rapports au sacré. En ce sens, l'exil forcé ne produit pas seulement des sans-abris : il engendre des désaffiliés, des individus suspendus entre un passé révoqué et un avenir incertain, privés de la matrice territoriale qui les constituait comme sujets sociaux (Amnesty International, 2014).

Ce processus de désancrage se manifeste d'abord dans la dislocation des attaches communautaires. Dans les villages ou hameaux d'Afrique centrale, les liens sociaux sont rarement abstraits ou contractuels. Ils s'inscrivent dans une territorialité spécifique, une organisation de l'espace marquée par des lieux de mémoire, des frontières symboliques, des toponymies chargées de sens. Être originaire d'un espace, c'est y avoir des droits, une histoire, une reconnaissance. Quitter cet espace sous la contrainte, c'est perdre non seulement un habitat, mais aussi une position dans un ordre social, un statut au sein d'un groupe, une capacité d'agir dans un univers intelligible. L'exilé n'est pas seulement déplacé ; il est destitué. Il devient un corps sans territoire, une voix sans lieu, un citoyen privé d'ancrage.

La terre natale structure aussi la transmission intergénérationnelle. Elle est le support des mémoires familiales, le lieu d'initiation, le cadre dans lequel les aînés transmettent aux jeunes les savoirs, les valeurs et les récits qui fondent la cohésion du groupe. Son abandon précipité interrompt ces transmissions, fragilise les rituels, dissout les repères (Gillette, Bonerandi & Tayab, 2001). Les enfants déplacés grandissent souvent dans des espaces de relégation, camps, périphéries urbaines, zones de transit, où les anciens codes ne s'appliquent plus, où les traditions ne peuvent plus s'exercer, où l'identité collective se délite dans le quotidien de la précarité. Ainsi, le déplacement détruit non seulement les structures matérielles du monde paysan, mais aussi les cadres symboliques, son imaginaire, la temporalité propre (Gillette, Bonerandi & Tayab, 2001). Il impose un temps d'urgence, une spatialité désorganisée, une logique d'adaptation constante à des environnements instables.

À ce bouleversement identitaire s'ajoute une dépossession symbolique, parfois plus douloureuse que la perte matérielle elle-même (Hirt & Collignon, 2017). Les récits recueillis auprès des déplacés internes à l'extrême-nord Cameroun ou du Nord-Kivu expriment fréquemment un sentiment de déracinement irréversible, un arrachement intime à une terre devenue inaccessible. À Maroua, au Cameroun, Hadja Ramatou raconte :

*« C'est en pleine nuit que tout a basculé. Nous avons entendu les tirs, les cris, puis les flammes. Boko Haram venait d'attaquer notre village à Kolofata. Ma maison a été incendiée, mon mari enlevé sous mes yeux. Depuis, je vis à Maroua avec mes enfants, mais rien n'a de sens. J'ai l'impression de flotter entre deux mondes, sans attaches. Je ne suis plus chez moi ici, et je ne le suis plus là-bas non plus. Mes enfants refusent même de parler du village ; ils disent que c'est un lieu maudit. Moi, je ferme les yeux chaque soir en espérant revoir mon mari, entendre les bruits familiers de notre cour. Mais tout est devenu silence. Même les voisins ici nous regardent comme des intrus. Je sens dans leurs yeux qu'on déränge, qu'on n'est pas vraiment les bienvenus. On me dit de tourner la page, de reconstruire, mais comment reconstruire quand on a tout perdu, même l'envie de croire ? Je vis, oui, mais je survis surtout. Ce n'est pas une vie, c'est une attente. Une longue attente sans fin, entre ce que j'ai perdu et ce que je n'arrive pas à espérer. » (Hadja, 2024)*

À Goma, dans le Nord-Kivu, Jeanine Kabuo témoigne :

*« Quand les combats ont éclaté à Rutshuru, je n'ai pas réfléchi. J'ai pris mes enfants et j'ai couru. On a tout laissé : la maison, les habits, les photos, les souvenirs. Là-bas, il y avait les champs que mes parents cultivaient depuis des générations, la tombe de ma sœur que je visitais chaque semaine, l'église où j'ai dit oui à mon mari. Tout ce qui faisait ma vie, mes repères, mes racines. Aujourd'hui, je vis à Goma, mais je ne me reconnais plus. Je suis une étrangère dans cette ville, mais aussi une étrangère à moi-même. Je ne sais plus qui je suis sans Rutshuru. Mon village existe-t-il encore ? Ai-je encore le droit d'y penser sans douleur, sans honte, sans peur ? Quand je parle de chez moi, les gens détournent le regard, comme si c'était un passé qu'il fallait effacer. » (Kabuo, 2024).*

Cette expérience n'est pas seulement vécue sur le mode de la tristesse ou du regret, mais souvent comme une humiliation, un déclassement, voire une négation de soi (Jacquemot, 2025). Être contraint de partir, c'est reconnaître son impuissance face à la violence, c'est abandonner une histoire au profit d'un avenir opaque. Dans certains cas, les populations déplacées n'osent plus se revendiquer de leur lieu d'origine, soit parce qu'elles en ont été durablement exclues, soit parce que leur présence est désormais considérée comme une menace. Le territoire natal devient alors un lieu interdit, parfois

mythifié, parfois haï, mais chargé d'un affect ambivalent (Jacquemot, 2025). Cette altération du lien symbolique à la terre participe de la construction d'une mémoire fracturée, marquée par le silence, l'oubli ou la culpabilité. Ces deux témoignages, bien que situés dans des contextes géographiques distincts, traduisent une communauté d'expérience marquée par l'arrachement, la perte du sentiment d'appartenance et la fragmentation du lien au territoire. Ils révèlent la profondeur des séquelles symboliques du déplacement forcé, bien au-delà des seules statistiques humanitaires.

La perte du territoire d'origine engendre aussi une réorganisation des solidarités et des hiérarchies internes au sein des groupes déplacés. Ceux qui, dans le village d'origine, jouissaient d'un certain prestige ou d'une autorité peuvent se retrouver marginalisés dans les camps ou les quartiers d'accueil, privés de leur légitimité traditionnelle (Matthysen & Gobbers, 2022). Les normes qui fondaient les rapports sociaux sont remplacées par d'autres logiques, souvent informelles, parfois brutales. Dans ce nouveau contexte, la perte de la terre natale signifie aussi la perte d'un capital social, d'un ancrage statutaire, d'une lisibilité sociale. Elle ouvre la voie à de nouvelles formes d'inégalité, de stigmatisation, voire de violence intracommunautaire (Matthysen & Gobbers, 2022). Les déplacés sont souvent perçus comme des intrus, des porteurs de désordre, des concurrents pour les ressources rares. Leur présence dérange, leur passé les précède, leur avenir inquiète.

La perte de la terre natale constitue un moment de rupture fondamental dans l'expérience du déplacement forcé. Elle ne se réduit pas à une variable objective mesurable en kilomètres ou en hectares. Elle doit être comprise comme une fracture ontologique, un désalignement entre les individus et les mondes qu'ils habitent. C'est cette fracture qui rend le retour souvent impossible, même lorsque les conditions sécuritaires le permettent (Matthysen & Gobbers, 2022). Car revenir, ce n'est pas seulement retrouver une maison ou un champ : c'est réactiver une inscription dans un univers de sens, une reconnaissance sociale, un rapport apaisé au territoire. Tant que cette restauration symbolique n'est pas possible, l'exilé demeure en errance, même s'il est géographiquement revenu. C'est pourquoi toute politique de gestion des déplacements internes doit impérativement intégrer cette dimension immatérielle du déracinement, sous peine de reproduire, dans les discours de reconstruction, les mêmes logiques d'oubli et d'exclusion qui ont conduit au départ.

### *L'exil comme nouvelle norme : construction sociale de l'insécurité permanente*

L'exil, initialement perçu comme une réponse conjoncturelle à des menaces immédiates (Gillette, Bonerandi & Tayab, 2001), tend progressivement à se transformer en norme sociale dans plusieurs régions

d’Afrique centrale. Ce glissement de la précarité à la permanence, du temporaire au structurel, ne relève pas d’un simple allongement temporel de la situation de déplacement. Il témoigne d’un processus plus profond : celui par lequel l’insécurité devient un cadre d’existence stable, une condition intégrée dans les représentations collectives, un horizon quotidien auquel les individus s’adaptent (Musamba & Gobbers, 2023). Cette normalisation de l’exil révèle une mutation silencieuse mais puissante des régimes de sens autour de la mobilité forcée, des territoires et de la sécurité, dans des contextes où l’État n’apparaît plus comme le garant de la stabilité mais comme une figure distante, voire défaillante.

Au cœur de cette dynamique se trouve la construction sociale de l’insécurité comme donnée permanente de l’environnement (Stearns, 2018). Ce phénomène ne résulte pas seulement de la répétition des violences ou de l’absence de paix durable. Il repose sur un enchevêtrement d’expériences, de récits, de dispositifs institutionnels et de perceptions qui transforment l’exil en condition normale d’existence. Les individus ne fuient plus simplement des événements ponctuels, mais des configurations de vie devenues insoutenables, marquées par l’imprévisibilité, la pauvreté chronique, la dislocation des liens sociaux, et la menace constante (Musamba & Gobbers, 2023). L’insécurité cesse alors d’être un accident du réel pour devenir une dimension intégrée au quotidien, une composante de l’identité sociale des déplacés.

Cette intériorisation de l’exil comme norme s’inscrit dans un régime discursif plus large, produit à la fois par les acteurs institutionnels, les organisations humanitaires, les médias, et les communautés elles-mêmes (Stearns, 2018). Les récits du déplacement, abondamment relayés dans les rapports, les bases de données et les campagnes de sensibilisation, tendent à figer les déplacés dans une condition spécifique, celle de victimes passives d’un monde violent. Cette catégorisation, nécessaire à l’action humanitaire, produit aussi des effets de naturalisation. Elle institutionnalise l’idée que certains groupes, certaines régions, certains peuples, sont irrémédiablement liés à l’instabilité, comme si l’exil faisait partie de leur destin collectif (UNHCR, 2024). La violence cesse d’être perçue comme une anomalie à résoudre, pour devenir une fatalité à gérer.

Les dispositifs humanitaires eux-mêmes, tout en cherchant à soulager la détresse, participent à cette sédimentation de l’insécurité. Les camps, les programmes d’assistance, les politiques de protection déploient une logique de stabilisation dans l’urgence, mais rarement de transformation structurelle des causes (UNHCR, 2024). Les populations déplacées sont souvent installées dans des espaces de transit qui deviennent définitifs, dans des abris dits temporaires qui s’éternisent. Le temps de l’exil se fige, et avec lui s’installe une forme d’habitude du provisoire, une acceptation résignée de la précarité. Cette sédentarisation de l’urgence engendre une double contradiction : d’une

part, elle donne aux déplacés un sentiment relatif de sécurité, d'autre part, elle les enferme dans une condition marginale, sans réels droits fonciers, sans perspectives économiques, sans reconnaissance politique (IDMC, 2017).

L'environnement d'accueil, qu'il soit rural ou urbain, participe également à la construction de cette norme de l'exil. Loin de constituer des refuges neutres, les zones de relocalisation sont souvent des espaces de tensions, de concurrence pour les ressources, de rejets identitaires (Minfegue, 2019). Les déplacés y sont tolérés, parfois soutenus, mais rarement pleinement intégrés. Cette position d'entre-deux, ni totalement étrangers, ni pleinement reconnus, renforce leur assignation à une identité d'« éternels déplacés ». Ils vivent dans une forme de liminalité sociale, marqués par la mémoire du départ, exclus de la citoyenneté locale, et projetés dans un avenir sans garantie (Minfegue, 2019). Dans cet entrelacs de marginalité et de dépendance, l'exil devient moins une étape vers autre chose qu'un mode d'existence reproduit et banalisé.

Cette banalisation n'est pas sans effets sur les représentations que les individus se font de leur propre place dans le monde. Nombre de déplacés finissent par considérer leur mobilité forcée comme une fatalité historique, une épreuve inscrite dans leur trajectoire communautaire (OCHA, 2014). L'espoir du retour, s'il subsiste, est souvent miné par l'absence de perspectives concrètes, par la peur des représailles, ou par la transformation irréversible de leur village d'origine. Certains récits recueillis dans les régions du Kasaï ou de l'Est tchadien montrent que les jeunes générations, nées dans les camps ou dans les sites de relocalisation, n'ont plus aucun lien direct avec le territoire d'origine de leurs parents. Leur monde est celui de l'exil, et leur subjectivité s'est construite dans cette condition. Ainsi, l'exil cesse d'être une parenthèse et devient un cadre social de formation des identités (OCHA, 2014).

La construction sociale de l'insécurité permanente, telle qu'elle se manifeste dans l'institutionnalisation de l'exil comme norme, est un processus à la fois insidieux et structurant. Elle permet de comprendre pourquoi certaines situations de déplacement perdurent au-delà des conflits armés, pourquoi les retours sont si rares, et pourquoi les politiques de réintégration échouent si souvent (Agier, 2008). Elle rappelle aussi que toute politique de prévention ou de réponse aux déplacements forcés doit impérativement intégrer une dimension symbolique, culturelle et politique. Il ne suffit pas de sécuriser un territoire ou de fournir une aide matérielle ; il faut restaurer les conditions d'un sentiment de stabilité, de dignité et d'appartenance. Tant que l'exil est perçu et vécu comme une norme, toute tentative de reconstruction sociale reste incomplète, voire illusoire. D'où l'importance de comprendre les processus d'institutionnalisation de la mobilité forcée.

## INSTITUTIONNALISATION DE LA MOBILITÉ FORCÉE ET REPRODUCTION DES INÉGALITÉS

Le déplacement forcé n'évolue pas dans un vide social. Il est encadré, nommé, catégorisé et souvent légitimé par des dispositifs institutionnels. Cette section analyse, d'une part, le rôle des récits humanitaires, des ONG et des mécanismes d'aide dans la normalisation du déplacement (1), et d'autre part, la manière dont ces mêmes dispositifs contribuent à l'exclusion des déplacés internes des politiques nationales et à leur invisibilisation dans l'espace public (2).

### *Rôle des récits, des ONG et des dispositifs humanitaires dans la normalisation du déplacement*

Les récits produits par les déplacés eux-mêmes, ainsi que ceux relayés et amplifiés par les organisations non gouvernementales (ONG) et les dispositifs humanitaires<sup>1</sup>, jouent un rôle central dans la construction sociale et la normalisation de la mobilité forcée (ACAPS, 2023). Cette dynamique narrative dépasse la simple description des souffrances ou des besoins d'assistance. Elle participe à la fabrication d'un cadre symbolique, politique et institutionnel qui façonne non seulement la manière dont le déplacement est perçu par les acteurs externes, mais aussi comment il est vécu, interprété et reproduit par les populations concernées. Ainsi, à Birao, dans le nord-est de la République centrafricaine, Jérôme Yakité, père de six enfants déplacé depuis 2020, raconte :

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<sup>1</sup> Ces ONG jouent un rôle crucial dans la gestion des déplacements internes en Afrique centrale, intervenant dans des contextes marqués par l'instabilité, la violence et la précarité. Médecins Sans Frontières (MSF) est particulièrement active en République démocratique du Congo, en République centrafricaine, au Cameroun et au Tchad, offrant des soins médicaux d'urgence aux populations déplacées, luttant contre les épidémies et répondant aux besoins liés aux violences armées, notamment dans la région de l'Est de la RDC à Ituri. L'International Rescue Committee (IRC) déploie ses efforts notamment en République centrafricaine, où elle met en œuvre des programmes de protection ciblant spécifiquement les femmes et les enfants déplacés, tout en assurant l'accès à l'eau potable, l'éducation d'urgence et un soutien psychosocial essentiel à la résilience des communautés affectées. Le Norwegian Refugee Council (NRC) intervient au Cameroun et en RDC, avec un focus sur la sécurité alimentaire, l'accès au logement et la défense des droits des déplacés, particulièrement dans les régions du Nord-Ouest et Sud-Ouest camerounais, où la réinstallation des déplacés internes constitue un enjeu majeur. Par ailleurs, l'Organisation internationale pour les migrations (OIM) joue un rôle stratégique dans la coordination des efforts de gestion des déplacements, en menant des actions de cartographie des zones à risque, de prévention des crises et de renforcement de la gouvernance locale, notamment dans la région du Lac Tchad. Enfin, Relief International s'emploie à répondre aux urgences humanitaires et à soutenir la réhabilitation des infrastructures sociales, particulièrement dans le Kasaï en RDC, où les violences communautaires ont provoqué des déplacements massifs. Ces ONG, par la diversité de leurs interventions, contribuent non seulement à l'assistance immédiate mais aussi à la construction de solutions durables face aux défis complexes des déplacements internes en Afrique centrale.

*« J'étais cultivateur dans un petit village près de Ouandja. Un matin, on a entendu des coups de feu, et en quelques heures, tout a brûlé. Ma maison, mes champs, mes souvenirs. On a fui sans rien prendre, juste les enfants dans les bras. Depuis, je vis dans un site de déplacés à Birao. La bâche qui me couvre fuit pendant la saison des pluies, mes enfants ne vont plus à l'école. J'ai 46 ans, mais je me sens comme un vieillard. On nous distribue parfois du riz, mais pas toujours. Ce qui me fait le plus mal, c'est de ne plus savoir si un jour je pourrai retourner là où je suis né. »*

Ce témoignage met en lumière l'impact durable de l'exil sur les repères existentiels et identitaires. L'analyse de ce rôle révèle une double ambivalence : d'un côté, ces récits et dispositifs constituent des leviers indispensables pour la reconnaissance des déplacés, la mobilisation de ressources et la protection ; de l'autre, ils peuvent contribuer, souvent involontairement, à figer les identités des déplacés dans une condition d'exception permanente, consolidant ainsi leur marginalisation et la reproduction de leur vulnérabilité (ACAPS, 2023).

Dans le bassin du lac Tchad, les récits des déplacés internes traduisent une réalité douloureuse et complexe, où la violence des groupes armés, la raréfaction des ressources et les tensions communautaires façonnent une expérience de déracinement profondément ancrée dans le quotidien. Aminatou, une femme originaire de la région de Baga Sola au Tchad, raconte comment elle a dû fuir son village après une attaque meurtrière attribuée à des combattants de Boko Haram :

*« Nous avons vu nos maisons brûler, nos champs détruits, et des membres de notre famille emportés par la violence. Partir signifiait tout abandonner : nos terres, nos souvenirs, nos ancêtres. Ici, dans le camp, nous sommes en sécurité, mais chaque nuit, je pleure mon village. Je crains que le retour ne soit jamais possible. »*

Ce témoignage souligne non seulement la rupture spatiale, mais aussi la dépossession symbolique que subissent les déplacés, illustrant comment l'exil devient une condition imposée, à la fois subie et intériorisée, dans un contexte marqué par l'incertitude et la fragilité.

Les ONG, acteurs majeurs de la réponse aux déplacements internes, jouent un rôle ambivalent dans ce processus de normalisation. Leur action humanitaire est indispensable : elles apportent une aide vitale en termes de nourriture, de soins, de logement, et œuvrent à la protection des droits fondamentaux. Mais leur mode d'intervention, centré sur l'urgence et la

gestion des crises, tend à installer les déplacés dans des situations « gérées » mais peu transformantes (UNHCR, 2024). La mise en place de camps, de sites de relocalisation ou de centres d'accueil crée des espaces quasi institutionnels où la mobilité est à la fois limitée et encadrée. Ces espaces deviennent des « territoires du déplacement », des zones d'habitat forcé où les déplacés vivent dans une forme de sédentarisation contrainte, coupés de leurs terres d'origine (UNHCR, 2024). La logique humanitaire, en se concentrant sur l'assistance immédiate, contribue à transformer ces situations temporaires en réalité durable, où l'exil cesse d'être une étape provisoire pour devenir un mode de vie.

Par ailleurs, les dispositifs institutionnels et réglementaires, issus de la coopération internationale, des politiques nationales ou des agences spécialisées, tendent à figer les déplacés dans des catégories administratives spécifiques. Les mécanismes d'enregistrement, les critères d'accès aux aides, les programmes de réinstallation ou de réintégration officialisent leur statut d'exclus ou de « populations à risque » (Convention de Kampala, 2009). Cette catégorisation administrative, bien qu'essentielle pour l'organisation de l'aide, enferme souvent les déplacés dans une identité stigmatisante, qui limite leurs capacités d'insertion socio-économique et politique. Le dispositif humanitaire, en cherchant à protéger, produit paradoxalement une forme d'exclusion structurelle, en renforçant les frontières entre déplacés et populations hôtes, entre victimes et citoyens, entre marge et centre (Convention de Kampala, 2009).

Les récits humanitaires, diffusés à travers les rapports, les campagnes médiatiques et les plaidoyers, contribuent aussi à la construction d'une perception internationale où l'Afrique centrale est souvent associée à des crises humanitaires récurrentes, à des zones de violence chronique et à des populations perpétuellement déplacées (IDMC, 2013). Cette image génère un paradoxe : elle suscite certes la mobilisation de fonds et d'efforts, mais elle renforce également une forme de « fatalisme » dans la gouvernance régionale et internationale, où l'exil est envisagé moins comme un problème à résoudre que comme un phénomène inévitable (IDMC, 2013). La répétition et la surmédiation de ces récits figent les zones concernées dans une temporalité de crise permanente, décourageant ainsi les initiatives de prévention structurelle ou de transformation politique.

Enfin, la diffusion et la reproduction de ces récits à l'échelle locale influencent profondément la manière dont les déplacés eux-mêmes se représentent. À force d'entendre parler d'eux comme de victimes perpétuelles ou de « déplacés », certains intègrent cette identité comme un marqueur central de leur existence (IDMC, 2014). L'exil devient alors une part constitutive du récit personnel et collectif, une étiquette difficile à dépasser. Cette intériorisation peut engendrer des effets délétères sur la confiance en soi, le

sentiment d'appartenance et les perspectives d'avenir (IDMC, 2014). Elle oriente aussi les attentes vis-à-vis des autorités et des bailleurs vers une assistance continue, parfois au détriment de dynamiques d'autonomisation et d'initiative locale.

Ainsi, la normalisation du déplacement, sous l'effet conjugué des récits, des ONG et des dispositifs humanitaires, s'inscrit dans une dialectique complexe entre reconnaissance et marginalisation, entre visibilité et stigmatisation. Elle illustre les limites des approches humanitaires centrées sur la gestion de la crise immédiate, au détriment d'une réflexion plus approfondie sur les causes structurelles et les processus sociaux qui engendrent l'exil forcé (UNHCR, 2024). Cette compréhension invite à repenser les politiques publiques et les stratégies d'intervention, en intégrant davantage les voix des déplacés dans la définition des réponses, en valorisant leurs capacités de résilience et en promouvant des approches qui dépassent le cadre restrictif de l'urgence pour embrasser la prévention, la justice territoriale et l'inclusion durable.

### *Exclusion et invisibilisation des déplacés internes dans les politiques nationales*

L'exclusion et l'invisibilisation des déplacés internes dans les politiques nationales constituent des phénomènes profondément enracinés dans les dynamiques étatiques d'Afrique centrale, reflétant à la fois les faiblesses structurelles des institutions et les logiques politiques qui marginalisent des populations déjà vulnérables (Minfegue, 2019). Dans des pays comme le Cameroun, la République centrafricaine, le Tchad ou la République démocratique du Congo, leur prise en compte dans les politiques publiques reste souvent fragmentaire, sporadique, voire absente (IDMC, 2017). Cette marginalisation institutionnelle, au-delà d'être une faille administrative, traduit une forme de relégation sociale et politique dont les conséquences exacerbent la précarité, la stigmatisation et la fragilisation des déplacés.

Au cœur de cette invisibilisation se trouve une contradiction fondamentale : les déplacés internes, bien qu'étant des citoyens à part entière de leur pays, sont traités comme des populations hors du champ ordinaire des droits et des protections étatiques (Cournil, 2009). Leur situation juridique est fréquemment ambiguë, car ils ne franchissent pas les frontières internationales, échappant ainsi à la définition de réfugié, qui bénéficierait d'un cadre juridique international plus clair et protecteur. Cette absence de statut juridique distinct dans la plupart des législations nationales contribue à leur exclusion des dispositifs de protection sociale, des programmes de relogement et des plans de développement local.

Sur le terrain, cette lacune est partiellement comblée par des acteurs non étatiques. Lors de nos enquêtes menées dans la région de Baga Sola (Tchad) et dans l'Extrême-Nord camerounais, plusieurs interventions d'agences telles que l'OIM, le HCR, Action contre la Faim (ACF), INTERSOS ou COOPI ont été observées. Par exemple, le projet "Rapid Response Mechanism" (RRM), financé par ECHO et mis en œuvre par ACF et Solidarités International au Tchad, vise à apporter une assistance d'urgence aux nouveaux déplacés dans la région du Lac (ACF-Tchad, 2023). De même, le HCR soutient les gouvernements du Nigeria, du Niger, du Cameroun et du Tchad pour l'enregistrement biométrique des déplacés et la distribution de kits d'abris (HCR, 2023). Ces initiatives révèlent aussi la délégation progressive de la responsabilité étatique à des structures internationales ou humanitaires, ce qui interroge durablement les mécanismes de souveraineté, de citoyenneté et d'intégration.

Par ailleurs, cette invisibilité politique s'inscrit dans une gouvernance marquée par des priorités souvent contradictoires. Les États d'Afrique centrale, confrontés à des défis majeurs tels que la faiblesse des ressources publiques, l'instabilité politique, et des crises sécuritaires récurrentes, tendent à concentrer leurs efforts sur le contrôle sécuritaire et la stabilisation immédiate, au détriment d'une stratégie intégrée et durable d'inclusion sociale (Ntuda, 2017). Les déplacés internes, dans ce contexte, sont perçus davantage comme un problème à gérer qu'une composante à intégrer dans la construction nationale (Ntuda, 2017). Cette approche réduit leur rôle à celui de bénéficiaires passifs d'une aide humanitaire temporaire, marginalisant leurs aspirations à la citoyenneté active, à la participation politique et au développement économique.

Cette marginalisation institutionnelle est renforcée par une sous-représentation des déplacés dans les mécanismes de décision et de planification (Agier, 2008). Les politiques nationales, lorsqu'elles existent, sont souvent élaborées sans consultation réelle des populations concernées, ni des autorités locales qui doivent les mettre en œuvre. Le déficit de dialogue et de concertation perpétue une distance entre les décideurs et les déplacés, alimentant un sentiment d'abandon et d'exclusion (Agier, 2008). L'absence de plateformes de participation inclusives empêche la prise en compte des besoins réels, des savoirs locaux et des solutions endogènes qui peuvent favoriser une meilleure réinsertion et une cohésion sociale renforcée.

L'exclusion des déplacés internes dans les politiques nationales s'exprime également dans la répartition inégale des ressources et dans la mise en œuvre des programmes de développement (Lardeux, 2009). Souvent concentrées sur les zones urbaines ou les centres administratifs, les interventions étatiques ignorent les espaces périphériques ou ruraux où s'entassent les déplacés, accentuant ainsi les disparités territoriales. Cette

répartition inéquitable alimente des tensions entre populations déplacées et communautés hôtes, nourrissant des conflits locaux et renforçant la vulnérabilité des déplacés (Lardeux, 2009). L'absence d'intégration économique et sociale dans ces espaces de relocalisation contribue à maintenir les déplacés dans des conditions de précarité, d'insécurité alimentaire et d'exclusion sociale prolongée.

Sur le plan symbolique, cette invisibilisation s'accompagne d'une stigmatisation sociale. Les déplacés internes sont fréquemment perçus par les sociétés d'accueil comme des « étrangers » ou des « perturbateurs » de l'ordre social, ce qui alimente des discriminations, des violences et une exclusion culturelle (Lardeux, 2009). Lors de nos enquêtes dans les zones de Minawao (Cameroun) et Bol-Baga Sola (Tchad), plusieurs déplacés ont relaté leur marginalisation dans l'accès à l'emploi, à la terre, ou aux services publics, souvent réservés prioritairement aux autochtones (Mimche & Pelican, 2012). À Mokolo, une élite locale nous a confié qu'une partie de la population locale considérait les déplacés comme une source d'insécurité et de concurrence économique, renforçant les tensions. Cette perception est confirmée par le rapport conjoint du HCR et de Reach (2023), qui souligne que dans les communes de Mokolo, Koza et Kolofata, des conflits entre déplacés et hôtes sont liés à l'accès aux ressources, notamment l'eau, la terre et les services de santé (REACH-HCR, 2023).

Dans le département du Diamaré, les autorités municipales m'ont indiqué que les déplacés du Logone-et-Chari qui s'étaient installés à Maroua à la suite des affrontements intercommunautaires de 2021 entre pêcheurs mousgoums et éleveurs arabes choas, étaient encore qualifiés de fauteurs de troubles par une partie de l'opinion locale, malgré leur statut de victimes. Des enquêtes menées par Human Rights Watch (2022) corroborent ces témoignages en soulignant que les déplacés du conflit Mousgoum-Choa ont été ciblés par des discours de haine, y compris de la part d'élus locaux, ce qui a limité leur accès à des mécanismes formels d'assistance (HRW, 2022). Cette stigmatisation est renforcée par des discours politiques ou médiatiques peu nuancés. Par exemple, lors d'un entretien informel à Mora en 2023, un représentant local d'une ONG nous confiait que certains journalistes locaux associaient systématiquement les déplacés à l'« infiltration terroriste » ou à l'« islamisation rampante », alimentant la peur au sein des populations d'accueil. Cette lecture négative contribue à figer les déplacés dans une image d'altérité indésirable et empêche leur intégration.

Cette dynamique d'exclusion et d'invisibilisation s'inscrit aussi dans un contexte régional où la souveraineté étatique est parfois fragilisée par des ingérences extérieures et des conflits transfrontaliers (Chadderton & Edmonds 2015). Les États d'Afrique centrale se trouvent ainsi confrontés à un dilemme entre la gestion de leurs crises internes et la pression internationale pour

respecter les normes des droits humains et des réfugiés. Cette tension contribue à retarder la mise en place de cadres législatifs clairs et à maintenir un flou juridique qui nuit à la protection effective des déplacés (Chadderton & Edmonds 2015). Par ailleurs, les ressources limitées allouées à la gestion des déplacements internes sont souvent captées par des circuits bureaucratiques opaques, renforçant la défiance des populations envers les institutions étatiques.

Toutefois, cette exclusion institutionnelle n'est pas une fatalité immuable. Elle invite à repenser les politiques nationales sous l'angle de l'inclusion sociale et de la justice territoriale, en reconnaissant pleinement les déplacés internes comme des acteurs à part entière de la reconstruction nationale (Chaulia, 2003). Cela suppose d'inscrire les déplacements internes dans les stratégies nationales de développement, de sécurité et de cohésion sociale, en développant des mécanismes de participation citoyenne qui intègrent les déplacés dans les processus de décision (Chaulia, 2003). Il s'agit également de clarifier leur statut juridique, d'assurer leur accès aux droits fondamentaux, et de promouvoir des politiques de réintégration et de relocalisation respectueuses des spécificités locales.

L'exclusion et l'invisibilisation des déplacés internes dans les politiques nationales révèlent une contradiction profonde entre les réalités vécues par ces populations et les réponses institutionnelles apportées (Chadderton & Edmonds 2015). Ce décalage renforce leur vulnérabilité et perpétue les cycles d'exil forcé. Pour sortir de cette impasse, il est crucial d'adopter une approche holistique qui combine une reconnaissance politique accrue, une intégration sociale effective et une justice territoriale adaptée. Ce faisant, les États d'Afrique centrale pourraient non seulement répondre de manière plus efficace aux défis posés par les déplacements internes, mais aussi renforcer la cohésion nationale et la résilience face aux crises futures.

## **Conclusion**

Comprendre les dynamiques contemporaines du déplacement interne en Afrique centrale impose de sortir des lectures simplistes, réactives et souvent exclusivement sécuritaires, qui masquent l'ancrage profond de ces mouvements dans les structures sociales, politiques, territoriales et symboliques des sociétés concernées. L'étude ici menée, à travers une approche croisée géopolitique et constructiviste phénoménologique, a permis de cartographier ces causes structurelles, en dépassant les explications conjoncturelles et en dévoilant les logiques de domination et les récits sociaux qui normalisent l'exil forcé.

Les résultats obtenus montrent que le déplacement interne dans les pays d'Afrique centrale étudiés, Cameroun, Tchad, République centrafricaine et République démocratique du Congo, s'inscrit dans une configuration

systémique de vulnérabilités multidimensionnelles. La fragmentation de l'État, la prolifération d'acteurs armés, l'appropriation abusive des ressources naturelles, la militarisation des campagnes, les tensions ethno-territoriales, les effets du changement climatique, tout comme la faillite de la gouvernance locale, forment un socle de pressions permanentes qui alimentent et perpétuent les mobilités forcées. Ces dynamiques territoriales ne sont pas des accidents de l'histoire : elles résultent de choix politiques, d'arrangements économiques et de structures sociales profondément enracinées, qui produisent et reproduisent des inégalités spatiales et humaines.

Mais au-delà de cette lecture géopolitique, l'étude a révélé que l'exil est aussi une construction sociale intériorisée. À travers les récits de déplacés, les discours des ONG, les catégorisations administratives et les réponses humanitaires, le déplacement se constitue peu à peu comme une norme. On assiste à une institutionnalisation du mouvement, une sédimentation des représentations de la fuite comme réponse « naturelle » à l'insécurité, et une acceptation, parfois résignée, parfois revendiquée, du statut de déplacé. Ce processus de « désappartenance » symbolique transforme la terre natale en un espace menaçant, tandis que les camps, les périphéries urbaines ou les sites d'accueil deviennent les nouveaux lieux d'ancrage temporaire ou durable, malgré l'absence de reconnaissance, de droits garantis ou de perspectives claires d'avenir.

Cette double lecture, à la fois des logiques de domination spatiale et des représentations sociales, permet de penser le déplacement interne comme un phénomène total : enraciné dans des rapports de force historiques, mais également vécu, interprété, raconté et légitimé par des dispositifs symboliques et institutionnels. C'est cette articulation qui fonde la richesse et la pertinence du cadre d'analyse ici mobilisé.

Sur le plan théorique, l'étude confirme l'intérêt d'une articulation entre la géopolitique de François Thual et le constructivisme phénoménologique de Peter Berger et Thomas Luckmann. En effet, si la géopolitique permet d'appréhender les reconfigurations territoriales, les rivalités de pouvoir et les lignes de fracture entre groupes, le constructivisme offre une entrée complémentaire en mettant en lumière la manière dont les réalités sociales sont construites par l'interaction, la narration et l'institution. L'un éclaire les causes objectives, l'autre les perceptions subjectives ; ensemble, ils permettent d'approcher le déplacement dans toute sa densité.

Sur le plan empirique, la triangulation des sources, entre données institutionnelles, littérature scientifique, témoignages de déplacés et entretiens avec des acteurs humanitaires, a permis de confirmer des régularités, mais aussi de faire émerger des spécificités locales. Il existe des variations importantes entre les contextes nationaux étudiés, tant en ce qui concerne les facteurs déclencheurs que les formes de déplacement ou les mécanismes

d'adaptation. Par exemple, en République centrafricaine, la polarisation communautaire et la dislocation de l'État ont favorisé des déplacements massifs et prolongés ; au Cameroun, c'est la combinaison entre insécurité dans le bassin du lac Tchad et conflit séparatiste anglophone qui alimente des flux complexes et entremêlés ; en RDC, les logiques extractivistes et la guerre de basse intensité dans l'Est produisent des vagues continues de déplacés ; au Tchad, enfin, les tensions climatiques, la pression foncière et la présence militaire créent un environnement de déplacement multiple, tant interne que transfrontalier.

Ces réalités soulignent l'urgence de penser une politique publique et régionale plus ambitieuse, qui s'attaque non seulement aux effets, mais surtout aux causes profondes du déplacement interne. À cet égard, plusieurs recommandations s'imposent.

Premièrement, il est impératif de renforcer les mécanismes de prévention structurelle des déplacements internes. Cela passe par une meilleure gouvernance territoriale, fondée sur l'inclusion des populations locales, la lutte contre les discriminations d'accès à la terre, et la sécurisation des droits fonciers collectifs. Les États doivent investir dans le développement local, renforcer la résilience des communautés, et garantir un minimum de justice territoriale, sans quoi les dynamiques d'exclusion continueront à produire du déplacement.

Deuxièmement, les politiques doivent intégrer une reconnaissance pleine et entière des déplacés internes, non seulement en tant que victimes, mais comme sujets de droit. Cela suppose de revoir les dispositifs nationaux de protection, de leur accorder un statut juridique solide, d'assurer leur accès aux services publics (éducation, santé, logement), et d'impliquer les communautés déplacées dans la définition des solutions durables.

Troisièmement, il convient de déconstruire les représentations sociales de l'exil, qui tendent à enfermer les déplacés dans des identités de dépendance et de marginalité. Il est essentiel d'encourager les récits alternatifs, valorisant les capacités d'agir des déplacés, leur résilience, leur contribution à la vie communautaire, et leurs stratégies innovantes d'adaptation. Le travail des ONG, des médias et des chercheurs est ici fondamental pour produire une narration plus équilibrée, moins victimisante, et plus juste.

Quatrièmement, la coopération régionale doit être renforcée. Le déplacement interne ne connaît pas de frontières administratives : il s'inscrit dans des dynamiques transfrontalières, impliquant des acteurs multiples et des enjeux partagés. Une réponse efficace suppose donc une coordination entre États, une harmonisation des cadres juridiques, un échange d'informations, et un appui mutuel dans la mise en œuvre des politiques de prévention, de protection et de réintégration.

Enfin, cette étude ouvre des perspectives pour des recherches futures. Il est pertinent d'approfondir l'analyse par des études comparatives avec d'autres régions du continent, ou par des études longitudinales suivant les trajectoires des déplacés sur plusieurs années. Il est également utile de croiser davantage les regards disciplinaires, géographie, sociologie, anthropologie, droit, économie, pour construire une compréhension réellement intégrée des phénomènes de mobilité contrainte.

En définitive, répondre à la crise des déplacements internes en Afrique centrale nécessite une rupture épistémologique et politique. Il ne suffit plus de gérer les crises humanitaires : il faut en prévenir les causes profondes. Il ne suffit plus d'assister les déplacés : il faut leur redonner une place et une voix dans les sociétés d'où ils ont été arrachés. Il ne suffit plus de penser en termes de sécurité : il faut penser en termes de justice. Car derrière chaque déplacement, il y a une dépossession, une blessure, une promesse trahie, mais aussi une possibilité de refonder le lien social, de réparer les territoires, et de réinventer l'appartenance.

En remettant au centre de l'analyse les causes structurelles, les rapports de domination et les représentations sociales du déplacement, cette recherche contribue à faire émerger une compréhension plus fine, plus lucide et plus humaine de l'exil forcé. Elle plaide pour une action publique audacieuse, qui fasse de la prévention des déplacements internes non plus un luxe ou une urgence ponctuelle, mais un impératif permanent de gouvernance et de dignité partagée.

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