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The Journal of Sociology: Bulletin of Yerevan State University, has a rich history of modernization. First published in 1967, it is one of the oldest and most prominent scientific journals in Armenia, firmly grounded in the fundamental traditions of interdisciplinary academic research and conceptualization. Since 2010, the Sociology Series of the Bulletin has been published as special issues.

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Yuliana Melkumyan, Ph.D., Associate Professor, Head of Social Work and Social Technologies Department Chair, Faculty of Sociology, Yerevan State University, Armenia. e-mail: yulianamelkumyan@ysu.am

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Gohar Shahnazaryan, Associate Professor, Department of Applied Sociology, and Director, Center for Gender and Leadership Studies, Yerevan State University, Armenia. email: gshahnazaryan@ysu.am

Vahe Sahakyan, Senior Information Resources Specialist and Research Associate, the University of Michigan-Dearborn Armenian Research Center, Dearborn, MI, USA e-mail: sahaky@umich.edu

Ali Reza Sharifi Yazdi, Ph.D. (Sociology), Professor at Family Research Institute, Tehran, Iran. e-mail: Rezasharifi10@gmail.com

Nikolay Miller, Ph.D. (Political Science), Independent Researcher, Pyatigorsk, Russia. E-mail: millernick@yandex.ru

Abdusabur A. Abdusamadov, Ph.D., Visiting Assistant Professor of Sociology and Social Justice, Miami University, Oxford, OH, USA. E-mail: abdusaa@miamioh.edu

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CHILD SEXUAL EXPLOITATION AND ABUSE: CULTURAL, SOCIAL, AND INSTITUTIONAL FACTORS OF RISK IN ARMENIA

Yuliana Melkumyan <https://orcid.org/0000-0002-8324-2632>

PhD, Associate Professor, Head of the Chair of Social Work and Social Technologies,
Yerevan State University. Email: yulianamelkumyan@ysu.am

Veronika Odinokova <https://orcid.org/0000-0002-9850-9109>

PhD, Scientific Director, Astra Foundation. Email: veronika.odinokova@gmail.com

Mira Antonyan <https://orcid.org/0000-0002-2708-0819>

PhD, Associate Professor, Chair of Social Work and Social Technologies, Yerevan
State University. Email: antonyan.mira@ysu.am

Abstract: Child Sexual Exploitation and Abuse (CSEA) remains a critical yet underreported issue in Armenia due to deeply rooted cultural, social, and legal barriers to reveal potential risks. This study explores the challenges surrounding the disclosure of CSEA cases, examining the roles of victims, families, professionals, and legal institutions in addressing this form of violence. Using a multidisciplinary approach, the research highlights how stigma, fear of social repercussions, and distrust in authorities contribute to the silence surrounding CSEA. The paper also investigates the role of gatekeepers in facilitating or hindering disclosure and research efforts involving child victims. Furthermore, the study emphasizes the need for culturally sensitive methodologies that align with local traditions while maintaining scientific rigor and ethical integrity. Findings suggest that improving legal frameworks, strengthening victim support services, and fostering public awareness are essential steps toward breaking the silence and ensuring child protection in Armenia.

Keywords: *Child Sexual Exploitation and Abuse (CSEA), Armenia, Expert Interviews, Child Protection, Public Health, Disclosure Barriers and Facilitators, Cultural Sensitivity, Social Stigma.*

Introduction: Legal and Social Aspects of the Issue

Child sexual exploitation and abuse (CSEA) is a grave violation of children's rights and a significant public health concern worldwide. Despite growing global awareness and



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research on CSEA, understanding of the issue remains limited in certain regions, including Armenia, where cultural norms, societal taboos, and insufficient data collection hinder efforts to address the problem. In many societies, including Armenia, discussing sexual abuse, particularly involving children, is often stigmatized, leading to underreporting and a lack of comprehensive strategies for prevention and intervention.

Sexual exploitation and sexual violence against children are serious and often hidden issues that directly affect children's well-being. Combating sexual exploitation and sexual violence against children is a priority in Armenia, especially since the ratification of the Lanzarote Convention in 2020, which aims to protect children from sexual exploitation and abuse (Council of Europe, 2007). To develop effective prevention programs and support services, it is essential to conduct surveys among children to understand their level of awareness, attitudes, and experiences regarding sexual exploitation and sexual violence.

The United Nations Children's Fund (2023) provides a comprehensive international definition of violence against children, describing it as "any deliberate, unwanted, and non-essential act of a sexual nature, either completed or attempted, that is perpetrated against a child, including for exploitative purposes, and that results in or has a high likelihood of resulting in injury, pain, or psychological suffering." For the purpose of generating global and regional estimates, sexual violence is broadly classified into two main categories: contact sexual violence (including rape and sexual assault) and non-contact sexual violence. These categories align with the framework established in the *International Classification of Violence against Children* (United Nations Children's Fund, 2023).

In the Armenian legal context, it is essential to differentiate between three terms that can be identified as CSEA when the subject is a child. **Sexual harassment** is defined in Article 3.3, "Prohibition of violence or sexual harassment at work (in the workplace)," of the Labor Code of the Republic of Armenia (Government of RA, 2023). **Sexual violence in the context of domestic violence** is addressed in the *Law on Prevention of Domestic Violence and Protection of Persons Subjected to Domestic Violence* (Government of RA, 2017). **Sexual crimes** are defined in Articles 198-199 of Chapter 18, "Crimes Against Sexual Inviolability and Sexual Freedom," in the Criminal Code of the Republic of Armenia, with Articles 200-202 specifically addressing offenses against children (Government of RA, 2021). Furthermore, protection of children from violence is subject to number of legal acts. In general, the regulations under the "Law on Child Rights" (RA National Assembly, 1996), Article 9, defines the right of every child to be protected from any kind of violence, including protection from the parents and legal representatives.

Understanding the real scope of CSEA on national level presents significant theoretical and practical challenges. These difficulties and lack of data hinder the development and implementation of effective measures to protect this vulnerable population. Over the past century, global interest in researching CSEA has steadily increased. However, a critical question remains regarding the correlation between heightened research interest and the level of case disclosure. The prevalence of sexual violence varies considerably across regions and countries, with factors such as older age, lower national income, and school-based survey methodologies linked to higher reported rates (Piolanti et al., 2025). In certain countries where CSEA remains a taboo,

disclosure rates are relatively low. This is often due to societal pressures that encourage concealing such incidents to avoid punishment, shame, and victim-blaming. Conversely, in countries that offer more robust protection and support for victims, disclosure rates tend to be higher (Alaggia, Collin-Vézina, & Lateef, 2019).

Catton, Dorahy, and Yogeeswaran (2023) provide empirical evidence that the fear of experiencing shame plays a significant role in individuals' decisions regarding disclosure (Catton, Dorahy, & Yogeeswaran, 2023). A systematic review of quantitative studies conducted by Latiff, Fang, Goh, and Tan (2024) between 2000 and 2022 identified 17 significant factors influencing sexual abuse disclosure barriers to disclosure were linked to intellectual disabilities, avoidant coping strategies, romantic involvement with the perpetrator, family criminality, domestic violence, adherence to traditional values, and ethnic minority status (Latiff, Fang, Goh, & Tan, 2024).

Alaggia, Collin-Vézina, and Lateef (2017) highlight that obstacles to disclosure of CSEA remain more significant than factors that facilitate it. These barriers include younger age, being male and the related stigma, familial ties to the perpetrator, internal struggles such as shame, self-blame, and fear, as well as family dynamics like dysfunction and abuse. Additionally, environmental and cultural factors, such as limited support from neighbors and schools and societal stigma, further hinder disclosure (Alaggia, Collin-Vézina, & Lateef, 2017). The results of the analysis of the situational factors of child sexual abuse conducted by Eritsyan, Odinokova, and Rusakova (2023) also support the idea, that the environment plays a significant role in preventing or enabling sexual violence against children. That is, public awareness and attitudes towards these issues, as well as the capacity to recognize and address risk of abuse, are of substantial importance in regards to preventing or adequately addressing the cases of sexual abuse against children (Eritsyan, Odinokova, and Rusakova, 2023).

Researchers in societies where issues related to sexuality are heavily stigmatized often refrain from pursuing this line of study. Factors such as limited research viability, insufficient funding, and the risk of social ostracization contribute to the scarcity of scholarly work on this critical issue in such regions.

These research findings indicate that reported cases of violence—those registered within the justice system—represent only a small fraction of the total incidents, as many children do not disclose their experiences to adults.

Global Statistics on CSEA Prevalence

The United Nations Children's Fund (2024) underscores the alarming global prevalence of sexual violence against children. According to their findings, 650 million girls and women worldwide (or 1 in 5) have experienced sexual violence during childhood. Among boys and men, the estimated number ranges between 410 and 530 million, representing approximately 1 in 7 individuals who faced sexual violence as children (United Nations Children's Fund, 2024).

A recent systematic review and meta-analysis by Piolanti et al. (2025) explored the prevalence of sexual violence against children, analyzing data from 165 studies that included 958,182 children across 80 countries, with a primary focus on girls (58.2%). The studies had sample sizes ranging from 330 to 132,948, and the mean age of participants varied from 10.5 to 19.4 years. Lifetime sexual harassment emerged as the most prevalent form of sexual violence, affecting 11.4% of children, followed by any

contact sexual violence at 8.7%. Additionally, 6.1% of children reported experiencing completed forced sexual intercourse in their lifetime, while 1.3% reported such experiences within the past year. Girls reported higher rates of lifetime completed forced sexual intercourse (6.8%) compared to boys (3.3%) (Piolanti et al., 2025).

Statistics on CSEA across the globe indicate a rising trend in sexual violence cases, largely driven by the widespread proliferation of internet-facilitated sexual crimes. According to the Prosecutor General's Office of Russia, 16,887 sexual offenses against children were recorded in 2021, marking a 44% increase compared to 2010 (Mamikonyan, 2022). Similarly, the German Federal Criminal Police Office reports an approximately 20% increase in the number of registered cases of sexual abuse against children over a five-year period since 2019 (Bundeskriminalamt, 2024).

Research on CSEA in Armenia

Among national population-based surveys on violence, Armenia conducts the Demographic and Health Survey (DHS). However, other key surveys, such as the Multiple Indicator Cluster Survey (MICS), Violence Against Children Survey (VACS), Global School-based Student Health Survey (GSHS), and Adverse Childhood Experiences Survey (ACES), are not utilized (World Health Organization, 2020).

On one hand, there are intense discussions in Armenian media outlets and on social media regarding disclosed cases of sexual violence against children. On the other hand, there is a noticeable absence of population-based surveys or research providing estimated prevalence rates or analyzing the dynamics of sexual violence against children in Armenia. Antonyan (2016) in her study of violence against children in the context of child safeguarding, notices that the risk of violence is mainly correlated with the environmental factors existing in the family setting, including parents' attitudes towards children, which can significantly raise the probability of violence (Antonyan, 2016).

In the study conducted by Azatyan, Azizian, and Hakobyan (2022), 10% of adult respondents reported having been sexually abused during childhood (Azatyan, Azizian, & Hakobyan, 2022). Yacoubian (2022) discusses Armenia's residential childcare institutions in the context of international child protection. According to his research only a small minority (31%) of children reported having had an educational seminar on sexual abuse or having had discussions with facility staff about sexual abuse (23%), suggesting that the problem is either ignored or that it is such a non-issue that formal processes to educate on the potential dangers of sexual abuse are perceived as unnecessary. A high majority (97%) reported never having been touched or been asked to touch someone else in a sexual way, and no children had ever been offered money to do sexual things. The few incidents of "inappropriate touching" were between children (Yacoubian, 2022).

There is a lack of survey data on CSEA in Armenia, and no mechanisms are in place for the periodic measurement and reporting of this issue by state institutions or NGOs. The only available data comes regularly from the Investigative Committee of the Republic of Armenia, which compiles statistics on crimes against minors, including CSEA.

Official Statistics on Criminal Proceedings and Cases of CSEA in Armenia

The statistics published on the official website of the Investigative Committee of the Republic of Armenia reveal a significant increase in the number of criminal proceedings concerning crimes committed against minors. In 2022, 545 proceedings were initiated, which rose to 1,159 in 2023. Remarkably, during just the first six months of 2024, 1,032 proceedings were already recorded (Investigative Committee of the Republic of Armenia, 2022, 2023, 2024). Of these cases, 66 were referred to court in 2022, 78 in 2023, and 64 during the first half of 2024, accounting for 12.1% in 2022, 6.7% in 2023, and 6.2% during the first six months of 2024. Crimes related to the sexual exploitation and abuse of minors accounted for 27.3% of all cases sent to court in 2022, 17.9% in 2023, and 25% during the first six months of 2024.

Statistics on defendants indicate that, in cases of crimes committed against minors, the largest group of defendants consists of the minor victims' family members, which aligns with global trends. Notably, the percentage of family members involved as defendants decreased significantly from 45.2% in 2022 to 26.9% in the first half of 2024 (see table 1).

Table 1. Statistics on Defendants in Cases of Crimes Committed Against Minors Sent to Court

(Investigative Committee of the Republic of Armenia, 2022, 2023, 2024)

Category	2022 (Jan–Dec)		2023 (Jan–Dec)		2024 (Jan–June)	
	Number	%	Number	%	Number	%
Other persons	36	49.3	50	61	44	65.7
A family member of the minor victim	33	45.2	29	35.4	18	26.9
Employee of an educational or childcare facility	4	5.5	-	-	4	6
Guardian or trustee	-	-	2	2.4	1	1.5
Employee of a healthcare facility	-	-	1	1.2	-	-
Total number of defendants	73	100	82	100	67	100

The statistics on victims of CSEA indicate that the percentage of victims younger than 12 years old remains notably high, though it has decreased from 38.5% in 2023 to 34.5% in the first half of 2024. Data on victims by sex is not available.

Table 2. Statistics on Minor Victims in Cases Sent to the Court

(Investigative Committee of the Republic of Armenia, 2022, 2023, 2024)

Age Group	2023 (January–December)		2024 (January–June)	
	Number	%	Number	%
Younger than 12 years old	35	38.5	27	34.5

Age Group	2023 (January–December)		2024 (January–June)	
12–14 years old		17	18.7	16
14–16 years old		19	20.9	16
16–18 years old		20	21.9	19
Total number of minor victims	91	100		78
				100

The number of registered cases in Armenia equals 1 out of 10,000 children experiencing sexual violence per year, which is a very low indicator compared to the global statistics discussed above. While official statistics provide an important reference for understanding CSEA trends in Armenia, it offers an incomplete picture of the problem. The statistics do not provide a breakdown by gender, making it impossible to determine whether boys or girls are more affected. There is no classification based on perpetrator relationships beyond broad categories (family, non-family). More detailed information about offenders (e.g., neighbors, peers, strangers) and the circumstances of abuse—such as whether it occurred at home, outdoors, in an institution, or involved the use of the internet and digital technology—could provide deeper insights into patterns of victimization. Finally, given the challenges in crime disclosure, the official statistics represent only the “tip of the iceberg”.

This lack of comprehensive, systematically collected data on CSEA leads to gaps in policy development and intervention strategies.

Method

This study seeks to gather insights into the legal, social, and contextual factors contributing to the vulnerability of children to CSEA in Armenia. The objective of the expert interviews was to gain insight into the professional experiences of specialists in Armenia regarding the study, detection, and prevention of sexual violence against children. Given the sensitive nature of CSEA and the high rates of underreporting in Armenia, expert interviews served as a **safe, ethical, and indirect approach** to gathering data on **prevalence, risk factors, best research practices, and institutional responses** to CSEA.

The **semi-structured expert interviews** addressed the following research questions:

1. How is child sexual exploitation and abuse perceived and addressed within the Armenian context?
2. What social, institutional, and cultural barriers exist to the disclosure of CSEA cases in Armenia?
3. What potential impact does the disclosure of CSEA have on Armenian children, their parents, and helping professionals?
4. What roles do different gatekeepers play in research involving children, particularly in facilitating or hindering research efforts?

Interviews were conducted both online and in person. In-person interviews were audio-recorded using a dictaphone, while online interviews were recorded through a videoconferencing platform.

Participant Selection and Recruitment

A combined **purposive and snowball sampling** approach was employed to recruit professionals from education, child protection, public health, and various governmental and nongovernmental agencies. The sampling process began by mapping all potential respondents with experience relevant to the research questions. Recruitment strategies included utilizing the pre-existing professional networks and contacts of the research team members. Participants were drawn from the following professional groups:

1. Gatekeepers from the education system/social care system (i.e. local government, director of organization, head teacher), i.e. people sanctioning the research in their domain and being a conduit or advocate for the research to parents and children.
2. Psychologists and social workers working with children in education and child protection systems (both the general population and children at risk or victims of CSEA) with experience managing CSEA cases.
3. Researchers from the academia and NGOs with experience conducting research with children on sensitive topics, including child abuse.
4. Lawyers with experience in child protection, response to child abuse and legal regulations regarding the duties of the research team to respond to child abuse disclosure.
5. NGO workers with expertise in prevention and response to child abuse.

A research information sheet was provided to potential respondents to inform them about the study and the conditions for participation. Following initial contact with the study researchers and preliminary agreement to participate, the research information sheet and a participant consent form were sent to respondents via email.

A total of **25 semi-structured expert interviews** were conducted to ensure information saturation. The sample included 8 social workers, 5 psychologists, 4 lawyers, 4 researchers, 2 doctors, and 2 pedagogues, each with 5 to 25 years of experience working with or researching child victims of sexual violence. Among the participants, 13 were affiliated with local and international NGOs, 4 represented local self-government bodies, 3 were from universities, 3 worked with research companies, and 2 were forensic experts.

Ethical Considerations

The interviews were preceded by obtaining verbal voluntary informed consent from all participants. The audio recordings were transcribed by a professional transcription service operating under a confidentiality agreement. Transcripts were assigned participant identification numbers, which were linked solely to basic demographic details, such as profession, geographic region (marz), gender, and years of experience. Each participant was recorded in a password-protected database, with access restricted exclusively to members of the research team.

Transcripts were saved with password protection and labeled with the corresponding participant ID. Audio recordings were deleted after the completion of the analysis.

Collecting data on children's experiences of violence is a complex process, presenting substantial ethical and methodological challenges (Melkonyan, Melkumyan, Karapetyan, & Hakobyan, 2024). To mitigate the risk of disclosing identifying information about children who have been sexually abused or exploited, or mentioning the names of other professionals working in the field during the expert interviews,

participants were reminded to share only non-identifiable information in the context of CSEA prevention and response. Interviewers intervened during any potential disclosures, reiterating the importance of maintaining confidentiality. Additionally, to address the possibility of discomfort when answering questions about their experiences, participants were reminded that they could choose not to answer any question they felt uncomfortable with and were provided with the option to opt out of the research at any point.

Data Analysis Approach

A base dataset was established in Atlas.ti, and a pragmatic approach to thematic analysis was applied, balancing both deductive and inductive processes (Ramanadhan, Revette, Lee, & Aveling, 2021). Researchers analyzed the interview data to determine the key requirements for surveying the prevalence of child sexual exploitation and abuse (CSEA) among 12–17-year-old teenagers in Armenia, as well as to identify optimal data collection and ethical procedures for research involving children.

Results

Availability of Evidence about CSEA in Armenia

According to expert interviews, research data on sexual violence against children play a critical role in understanding the prevalence, patterns, and underlying dynamics of this serious issue in Armenia. Such data are essential to accurately measure the scope of sexual violence, identify its distribution across different demographics—such as the child's gender—and analyze trends related to the profile of perpetrators. However, various factors hinder the study of this phenomenon for the subsequent safeguarding of minors in the realm of sexual integrity. These include the high level of crime latency, the taboo nature of the topic for broad public discussion, and the specific image of the perpetrator in the media. There are also additional challenges related to researching the characteristics of perpetrators and victims of sexual violence, who are likewise involved in the situation.

All experts emphasized that the issue of sexual violence against children is significantly underresearched in Armenia. Moreover, none of the researchers had access to reliable data on the prevalence of sexual violence against children in the country. Medical professionals highlight the lack of comprehensive data, with one doctor stating, *“We have data on the increase in cases of gonorrhea and syphilis among children under 13, but we don't have data on the causes. We can only assume that violence could be a factor.”* (Doctor, YSMU) Similarly, social workers and psychologists report concerning cases but acknowledge the absence of systematic data collection. As one social worker from an NGO noted, *“We know cases of 5-6 pregnant 15-16-year-old girls in our community. There are a lot of gossip and stigmatization, but we do not have data on the prevalence of violence in our community, region, or country”* (Social worker, NGO). This critical gap in academic knowledge compels professionals to rely more on intuition than on evidence-based practices when addressing practical cases, which significantly hampers the development of effective prevention and intervention strategies.

Gatekeeper experts, including social workers, physicians, and psychologists, who reported that they encounter cases of CSEA two to four times a year, echoed this concern. They reported a lack of comprehensive information on how to manage case

disclosure and the subsequent procedures involving physicians, law enforcement, and other institutions. A social worker from Regional Government illustrated this complexity through a case study: *"Schools and polyclinics avoid the disclosure of CSEA cases, especially if it involves domestic violence. It is perceived as a familiar issue. We had a case involving technology-facilitated sexual exploitation of an eighth-grade female student by 16 years old male student, who used digital recordings and threats of online distribution to coerce oral sexual acts. Despite initial law enforcement involvement, the boy's parents were so powerful that they were able to silence the girl, the girl's mother withdrew the complaint and moved out of town. I also faced personal safety concerns for advocating on behalf of the victim."* (Social worker, Regional Government) This deficiency creates significant challenges in ensuring the proper protection and support of affected children, highlighting the urgent need for standardized guidelines and inter-agency collaboration.

By providing a comprehensive evidence base, CSEA research enables policymakers, child protection agencies, and stakeholders to develop targeted strategies to address the issue effectively. It supports the creation of evidence-based standards of procedure (SOPs) and frameworks that prioritize the protection and well-being of children. Furthermore, reliable data empower initiatives aimed at enhancing the efficiency of prevention mechanisms, improving intervention programs, and fostering a stronger, more resilient system of child protection.

Ultimately, investing in research on sexual violence against children serves as a foundation for driving systemic change, building public awareness, and ensuring the safety and dignity of every child in Armenia.

The Barriers to Disclosure of CSEA Cases in Armenia

Most experts interviewed report that cases of sexual violence against children in Armenia are predominantly uncovered through professional networks, such as social workers, psychologists, and law enforcement professionals, as well as through reports on social media platforms (Vardanyan, 2024). These cases typically come to public attention only after a serious harm has already been inflicted on the child, highlighting a reactive rather than proactive approach to addressing CSEA. Early disclosure of CSEA is rare in Armenia, often due to societal stigma, fear of retaliation, lack of awareness, or insufficient support systems that would enable children or their caregivers to report abuse at an earlier stage. This is also conditioned by the lack of trust towards the support systems. The main concerns are related to the confidentiality issues, as well as not being sure that the response process will be carried out properly. As one of the interlocutors noted, *"Last year our NGO worked with 4 cases of CSEA. All the cases were referred to us by the police. Parents avoid the disclosure, being afraid of stigmatization and discrimination in the community."* (Social worker, NGO).

If a child reports or discloses an incident of sexual violence to a parent or teacher but is met with disbelief or mistrust, it can have severe consequences. When a child's courage to speak out is dismissed or ignored, it undermines their confidence and sense of safety. Consequently, the child is less likely to report any future incidents, leaving them more vulnerable to repeated abuse. This lack of trust and support increases the risk of the child becoming a recurring victim of sexual violence, as they may feel isolated and powerless to seek help. While all children are vulnerable to the risk of

sexual violence, empirical evidence and expert analysis indicate that children whose parents have limited education and inadequate parenting skills face a disproportionately higher level of risk (Sahakyan, Voskanyan, Mkrtchyan, 2024). As one social worker noted, *“We are often taught that education doesn’t matter, but it does. Children of parents with low education are more frequently subjected to CSEA due to a lack of awareness, information, and parenting skills. Furthermore, if the family situation is filled with conflicts and parents attempt to shift the responsibility of child-rearing onto the other parent, children may be pushed to the streets, where they become vulnerable to various perpetrators.”* (Social worker, NGO)

Children often lack essential knowledge about their bodies, including the concept of intimate body parts and personal boundaries. They may not fully understand which parts of their bodies are considered private or the importance of safeguarding these boundaries. Additionally, many children are not equipped with the language or skills to express discomfort or assert themselves when they experience unwanted physical contact. One of the interlocutors mentioned, *“It is extremely difficult to formulate questions during forensic interview with a child. They often lack the words to describe their body parts and usually show them on their own bodies.”* (Psychologist, NGO) This gap in understanding also extends to discussing their intimate body parts, as societal taboos and a lack of education may discourage open conversations about these topics. Consequently, children may struggle to recognize inappropriate behavior or communicate their concerns effectively, leaving them more vulnerable to potential harm.

Parents often avoid addressing the issue of sexual violence with their children, driven by fears of societal judgment, shame, and the potential for victim-blaming. This reluctance is frequently rooted in cultural stigmas and a lack of awareness about how to approach these sensitive topics effectively. Parental reactions can hinder the exposure of abuse and allow perpetrators to continue victimizing children, as illustrated in the case narrated by the social worker: *“A child disclosed to his mother that a man had asked him to kiss his penis. However, the mother dismissed the claim, believing it to be a product of the child’s imagination. Later, it was revealed that the same individual had committed similar acts of sexual violence against multiple children. While some children reported these incidents to their parents, many parents, unfortunately, chose to remain silent, further contributing to the lack of disclosure.”* (Social worker, NGO)

As a result, crucial conversations that could empower children to recognize and report inappropriate behavior are often neglected, further perpetuating silence around the issue. This avoidance contributes significantly to the underreporting of cases of sexual violence against children. When parents refrain from discussing these topics, children may lack the knowledge and confidence to identify and disclose instances of abuse. Additionally, societal stigmas and fears of judgment create an environment where both children and parents are hesitant to report such cases, perpetuating a cycle of silence and hindering efforts to address and prevent sexual violence.

According to expert interviews, in many cases, the perpetrators of sexual violence against children are family members, relatives, neighbors, or family friends who have established close connections with the family, for example: *“There was a documented case of sexual violence against a child in which the perpetrator was the grandmother. The child, however, lacked awareness that her actions constituted violence.”* (Social

worker, NGO) These individuals are often perceived as trustworthy, which can lead to a reluctance on the part of parents to believe a child's disclosure of abuse, thereby further complicating detection and intervention efforts. Children usually trust the perpetrator as well.

According to the experts, to be able to enhance the level of disclosure of the cases of sexual violence against children the following measures are needed. Firstly, specially trained professionals play a crucial role in identifying changes in a child's behavior that may indicate potential violence or abuse. These experts are equipped to recognize subtle signs and provide early intervention. Secondly, effective responses require a collaborative, multidisciplinary approach involving law enforcement, schools, and healthcare institutions such as polyclinics. Teamwork among these entities ensures that cases are addressed promptly and comprehensively, prioritizing the child's safety and well-being. Finally, parental skill training programs are essential for preventing cases of sexual violence. These programs educate parents about what constitutes sexual violence, its profound impact on a child's physical and psychological well-being, and strategies to protect their children from potential abuse. By equipping parents with knowledge and practical tools, such training fosters open communication, raises awareness of warning signs, and empowers parents to create a safe and supportive environment for their children.

Ethical Considerations and Potential Risks of CSEA disclosure in Armenian Society

In Armenia family honor, modesty, and community reputation play a significant role in shaping societal attitudes to CSEA. Discussing issues related to sexual abuse and exploitation can be highly stigmatized, making it crucial for researchers to adopt methods that ensure both ethical integrity and cultural sensitivity. Topics related to sexuality, especially child sexual abuse, are often considered shameful and inappropriate for public discussion. In many cases, Armenian families may avoid disclosure of abuse due to fear of damaging their social standing within the community.

Cultural narratives sometimes place shame both on victims and perpetrators, making it difficult for survivors and their families to come forward. One of the social workers reports, "*Children often remain silent due to feelings of shame and guilt. The perpetrator, who is often a family member (father, brother, uncle, or mother's partner) can instill fear and guilt in the child, convincing them that the abuse is an expression of love. Families are afraid to speak out, because they worry, they will be seen as 'contaminated,' 'damaged,' or viewed as 'material.' They fear losing their dignity, and the general fear of being blamed. Living in the same environment becomes very difficult after such events are revealed. In many cases, parents move, sometimes even leaving the country, especially in rural areas and small towns. I remember a case where a mother offered her child to an electrician in exchange for paying their electricity bill. When the story came out, they left the country. Sadly, the child was very young and attached to the mother, but the child should have been separated, as the mother was essentially trafficking her.*" (Social worker, YSU)

Another expert shared the following case: "*A case of sexual abuse in Gavar became public after a hospital nurse, instead of ensuring confidentiality, spread the*

information. This led to gossip and stigmatization of the child. As a result, if another child experiences CSEA, they may avoid seeking medical help." (Social worker, NGO). To navigate these challenges, methods of working with children must be adapted to the Armenian cultural context: using culturally appropriate and non-triggering language; engaging with community, governmental and non-governmental organizations, religious leaders, and social workers to gain community trust; ensuring strict confidentiality to encourage open and honest participation; using local trained professionals who understand cultural sensitivities and can navigate difficult conversations without causing distress. As one of our interlocutors stated, "*To avoid cultural and political interpretations of the issue, like it was in case of signing the Istanbul Convention, there should be cultural adaptations by local researchers and interviewers. I believe we constantly misinterpret how society should approach the issue of CSEA. I don't think anyone in our country would oppose their child being knowledgeable about their body and boundaries to protect themselves from abuse.*" (Researcher, YSU)

Culturally sensitive research on CSEA in Armenia requires balancing scientific rigor with cultural awareness to break the silence around the issue. By aligning methodologies with local traditions and social structures while ensuring respect, safety, and ethical integrity, researchers can foster meaningful dialogue and drive positive change.

Using Age-Appropriate Vocabulary When Discussing CSEA with Children in Armenia

Simple, clear, and relatable language should be employed to ensure the child can easily understand and engage with the discussion. It is necessary to avoid complex terms, abstract concepts, scientific terminology or ambiguous phrasing that may confuse or overwhelm the child.

Accessing children is crucial to ensure that their voices are not silenced in favor of those who claim to act in their "best interests" or by the policy and practice that shape their experiences of support.

The absence of a common vernacular for such topics also exacerbates cultural taboos, making discussions about sexual education, consent, or bodily autonomy even more challenging. Without accessible and normalized terminology, individuals may resort to euphemisms, vague descriptions, or avoid discussions altogether, which can lead to misunderstandings, misinformation, and missed opportunities for education and prevention. Addressing this gap through public awareness campaigns and education could foster better communication and understanding within Armenian society.

In Armenia, discussions about sexual topics are highly taboo. As a result, parents and teachers often avoid addressing sexual education, leaving children unprepared for their sexual lives and vulnerable to sexual violence. As a result, there is a notable lack of commonly used terms to describe intimate body parts and sexual acts.

The usage of **medical terminology for body parts** in Armenian is limited primarily to healthcare professionals, such as doctors and scientists, and is rarely employed in everyday conversations among the general population. One of the experts stated, "*Even doctors avoid naming intimate body parts properly. Gynecologists just say, 'Let me see.' That's it.*" (Social worker, NGO) This creates a significant

communication gap, as the general public lacks a standardized and widely understood vocabulary to discuss intimate or anatomical topics. Consequently, this can hinder effective communication between children, parents, teachers, and even healthcare providers, particularly when discussing sensitive issues such as health, hygiene, or abuse. And of course researchers lack the appropriate vocabulary to ask children about their experience. As one of the doctors mentioned, *“There is an Armenian word, ‘ban,’ which means ‘thing.’ This word is often used when people lack the proper means of articulation. Almost all terms related to sexual relations are replaced with the word ‘ban,’ blurring and mystifying everything.”* (Doctor, YSMU)

Conversely, **sexual profanity** often forms part of everyday language in Armenia, particularly among male adults and adolescents in informal settings. However, it remains a cultural taboo, especially for girls, who are expected to adhere to stricter standards of modesty and propriety. The use of sexual profanity by girls is often stigmatized and viewed as a violation of societal norms, reinforcing gender-based expectations and double standards. Furthermore, the use of sexual profanity by men and boys in the presence of women and girls is culturally prohibited in Armenian society, reflecting traditional norms that emphasize respect, modesty, and decorum in mixed-gender settings. When such language is used in the presence of women and girls, it is often considered disrespectful, inappropriate, and even offensive. In some cases, it may lead to social disapproval or reprimand, as it contradicts the societal emphasis on maintaining a courteous and respectful environment, especially in mixed-gender interactions. This unwritten rule reinforces the notion that women and girls should be shielded from explicit or vulgar language, as they are often seen as symbols of family honor and virtue. However, this expectation is not always uniformly followed, and violations can occur, particularly in more informal or less traditional contexts.

At the same time, this cultural norm highlights a double standard: while men are discouraged from using such language around women, sexual profanity among men or boys themselves is often normalized and may even be seen as a form of camaraderie. This disparity underscores the gendered expectations regarding behavior and language in Armenian society, where women are often expected to embody modesty, while men are granted greater freedom in their expressions. Gatekeepers working with children state, *“Male teenagers use insulting words in almost every sentence. If a girl uses such words, she is stigmatized as ill-mannered or worse.”* (Psychologist, NGO)

Insufficient vocabulary and taboos contribute to a broader culture of silence around sexual topics, as girls may feel additional pressure to avoid discussing anything related to sexuality, even in contexts where it is necessary for their safety or education. The normalization of profanity in male-dominated spaces further highlights the unequal gender dynamics in how such language is perceived and used.

Social workers and psychologists with experience working with children consistently report that when children experience abuse, they often struggle to verbalize their experiences. Instead of using words to describe what has happened to them, they frequently resort to **nonverbal communication**, such as pointing to or gesturing toward the parts of their body where they were touched by the perpetrator. This reliance on nonverbal cues can stem from several factors, including fear, confusion, lack of appropriate language, or the trauma associated with the abuse. As one of the interviewed lawyers stated, *“Children lack the appropriate words to*

describe the abuse. Some know only insulting terms, but they are too ashamed to use them when speaking to adults. Almost none know the biological terms for intimate body parts.” (Lawyer)

A significant barrier is the absence of comprehensive sexual education and open dialogue about bodily autonomy, consent, and abuse prevention. Many children are never taught the terminology needed to describe their bodies or inappropriate interactions in a clear and accurate way. Cultural taboos surrounding discussions of sexuality further exacerbate this problem, as children may internalize a sense of shame or fear of repercussions if they attempt to disclose their experiences.

The reliance on nonverbal communication also places an additional burden on social workers, psychologists, and other professionals to interpret these cues accurately, which can be challenging and may delay intervention. Miscommunication or missed signs can result in prolonged harm, as cases might not be addressed until more significant psychological or physical damage has occurred.

This situation underscores the urgent need for comprehensive education tailored to children's developmental stages. Programs should teach children the proper terminology for their body parts, emphasize their right to personal boundaries, and equip them to recognize and report inappropriate behavior. Furthermore, it highlights the importance of creating safe, open environments where children feel comfortable discussing sensitive issues without fear of judgment or reprisal. Training parents, teachers, and professionals to engage in these conversations with sensitivity and confidence is equally essential for fostering a culture of prevention and protection.

Discussion

The expert interviews reveal a critical gap in data on CSEA prevalence in Armenia. Professionals report that CSEA cases often remain underreported due to deeply ingrained cultural stigmas and fears of retaliation. Experts highlighted that the issue of sexual violence against children is significantly underresearched, and the lack of reliable statistics hinders the development of effective prevention strategies. This finding is in line with the international research on barriers CSEA disclosure, including the fear of negative consequences, shame, self-blame, developmental factors, gender influences, and their relationship to the perpetrator (Alaggia, Collin-Vézina, & Lateef, 2019; Augusti & Myhre, 2021; Morrison et al., 2018).

Social and cultural stigmas further reinforce this culture of silence, making it extremely difficult for children to seek help. Despite this, the increasing awareness of CSEA, especially following Armenia's ratification of international treaties like the Lanzarote Convention, is gradually shifting societal attitudes towards the need for more robust protective mechanisms.

The study emphasizes the need for a comprehensive, multidisciplinary approach to address CSEA, integrating efforts from the education, law enforcement, healthcare, and child protection sectors.

Research on CSEA disclosure barriers must also consider global ethical frameworks, such as the United Nations Convention on the Rights of the Child (UNCRC), which emphasizes children's right to express their views freely in matters affecting them, ensuring that participation remains voluntary and child-centered. The

issue of CSEA requires a nuanced, ethical approach that both safeguards the well-being of children and upholds legal and moral standards.

Projective techniques provide effective tools for understanding the experiences of children who have faced sexual violence, particularly in Armenian context, where deep-rooted stigma and the absence of an appropriate vocabulary to discuss body awareness and sexual safety present significant barriers to disclosure. Projective methods allow children to express their emotions, experiences, and trauma in indirect, non-verbal ways, reducing psychological distress and the fear of social consequences associated with direct questioning. Projective techniques and art therapy, when used by trained professionals, provide invaluable tools for understanding the experiences of children who have faced sexual violence. These methods offer a compassionate and detailed approach, balancing the need for accurate data with the priority of maintaining the child's emotional well-being and safety. Incorporating such techniques can deepen insights while fostering trust and support between the researcher and the child. Projective techniques and art therapy offer indirect yet effective ways to explore children's experiences of abuse without causing distress (West, 1998; Garb, Wood, & Nezworski, 2000).

The expert interviews helped to reveal the following **social barriers** for the disclosure of CSEA in Armenia. 1) Fear of Stigmatization. Victims and their families often refrain from reporting due to the fear of being shamed or ostracized by their communities. 2) Victim-Blaming Attitudes. Society may place responsibility on the victim rather than the perpetrator, discouraging disclosure. 3) Family Pressure and Honor Culture. Families may suppress disclosure to protect their reputation and avoid social disgrace. 4) Mistrust in Authorities. Survivors and their families lack confidence in law enforcement or social services, fearing that disclosure will not lead to justice or protection. 5) Lack of Awareness. Many victims, especially children, may not fully understand what constitutes abuse or their right to report it.

Among **cultural barriers** for the disclosure of CSEA in Armenia the following factors were outlined. 1) Taboos Surrounding Sexuality. Conversations about sexual abuse are often considered inappropriate, making it difficult for children to express their experiences. 2) Traditional Gender Norms. Patriarchal structures discourage girls from reporting abuse, while boys feel additional pressure due to societal expectations of masculinity. 3) Normalization of Authority and Obedience. Children are often taught to obey adults without question, making it harder for them to recognize and report abusive behavior.

Institutional barriers for the disclosure of CSEA in Armenia include 1) Lack of Child-Friendly Reporting Mechanisms. Existing systems may not be accessible or safe for children, discouraging them from seeking help. 2) Inadequate Training of Professionals. Social workers, teachers, and healthcare providers lack the skills to identify and respond appropriately to CSEA cases. 3) Limited Psychological Support for Victims. A shortage of trauma-informed counseling and rehabilitation services leaves victims without necessary care. 4) Inconsistent Law Enforcement Response. Police and judicial authorities may mishandle cases due to a lack of specialized training, leading to re-traumatization or case dismissal. 4) Gatekeeping by Institutions. Schools, polyclinics, and other institutions may prioritize their reputation over child protection, suppressing reports of abuse.

Conclusion

This study highlights the complex social, cultural, institutional, and legal barriers that hinder the disclosure of CSEA in Armenia. The findings demonstrate that deep-rooted societal taboos, fear of stigmatization, and distrust in authorities significantly contribute to the silence surrounding this issue. Institutional limitations, including the lack of child-friendly reporting mechanisms, insufficient training among professionals, and inconsistent law enforcement responses, further exacerbate the problem. Additionally, legal gaps and a lack of comprehensive, systematically collected data on CSEA hinder the development of effective prevention and intervention strategies.

Despite these challenges, the research underscores the urgent need for culturally sensitive approaches to breaking the silence around CSEA. Strengthening legal frameworks, enhancing child protection services, and fostering intersectoral collaboration among law enforcement, healthcare, education, and social services are critical steps toward improving child safety. Furthermore, investing in public awareness campaigns and educational programs can help shift societal attitudes and empower children with the language and resources to report abuse.

The study also highlights the importance of ethical and methodologically sound research on CSEA. Key challenges include the absence of research methods adapted to Armenian culture and language, a high level of stigma associated with sexual violence, a lack of vocabulary for discussing body awareness and sexual safety, and legal uncertainty regarding children's participation in research. Additionally, raising awareness through education programs is essential to empower children, parents, and professionals to better identify, respond to, and prevent sexual violence. Addressing CSEA in Armenia requires a multidisciplinary, evidence-based approach that prioritizes child protection, fosters societal dialogue, and ensures that all children have the right to live free from violence and exploitation.

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Conflict of Interests

The authors declare no ethical issues or conflicts of interest in this research.

Ethical Standards

The authors affirm this research did not involve human subjects.

USER INVOLVEMENT IN POVERTY POLICY STRUCTURES. AN APPROACH TO GIVE A VOICE TO PEOPLE LIVING IN POVERTY, TO ACHIEVE EFFECTIVE SOLUTIONS AND TO STRENGTHEN SOCIAL COHESION

Emanuela Chiapparini <https://orcid.org/0000-0002-1796-088X>

Dr. Sci. (paed.), Head of the Institute of Childhood, Youth and Family, School of Social Work, Berne University of Applied Sciences, Berne, Switzerland. Email: emanuela.chiapparini@bfh.ch

Abstract: Solidarity and social inclusion, which are often used as synonyms in professional discourse on social work, are understood to date with too little focus on the structural level in politics, economics and social services. Furthermore, in the implementation of projects to promote social cohesion, marginalized groups such as people affected by poverty have so far been insufficiently involved in identifying commonalities between groups of people and in joint activities. Therefore, following the user involvement approach and on a structural level, I argue that political, economic and social conditions as well commitment must be in place. In the case of people affected by poverty, who are a very heterogeneous group, at least in Switzerland, mechanisms are needed to enable these groups to identify and voice their concerns and bring them to the attention of the appropriate political, economic or social decision-makers in a targeted manner. Using two research-based projects from poverty policy in Switzerland, I follow to answer the research question: How can people affected by poverty be given a voice in the structures and decision-making processes of poverty policy? The theoretical framework is based on the user involvement approach. Using participative, qualitative and quantitative research methods I answer the question with the potential impact, challenges and conditions of an implementable platform and training courses for professionals from politics, economics and social services, as well as for people affected by poverty. This differentiated knowledge of people affected by poverty and the fulfillment of the requirements of all those involved, a structure of exchange supported by social policy and led by external professionals, willingness to learn and work together, clear communication, or reimbursement of travel expenses, are necessary to strive for a truly sustainable and inclusive society, rather than one that merely appears to be so. However, it should be noted that potential impact has been identified and that further long-term impact and international comparative analyses are necessary to gain comprehensive knowledge.

Keywords: *User involvement, poverty, politics, effective solutions, economy of social services, innovative projects, participative, qualitative, and quantitative research.*



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Introduction

Solidarity is often understood in professionals' discourse of social work as closely linked to the promotion of social cohesion (Dierckx et al., 2024, Hill et al., 2024). In addition to this, Tuğba Sevinç (2019) introduces the concept of social unity. In doing so, she focuses not only on "what members might already share in common, but also on what they do together in society." (ibid., p. 460).

Furthermore, in the implementation of projects to promote social cohesion, marginalized groups such as people affected by poverty have so far been insufficiently involved in identifying commonalities between groups of people and in joint activities.¹

Further, these mentioned approaches focus heavily on the civilian population and strengthening the individual. However, political, economic and social conditions determined possibilities for shaping solidarity and the achievement of social cohesion.

Therefore, following the user involvement approach and on a structural level, I advocate that the political, economic and social conditions and commitment must be in place to achieve social cohesion. In the following article, I explore the question:

How can people affected by poverty be given a voice in the structures and decision-making processes of poverty policy?

The theoretical framework is based on the user involvement approach. Using participative, qualitative and quantitative research methods I answer the question with the potential impact, challenges and conditions of an implementable platforms and training courses for professionals from politics, economics and social services, as well as for people affected by poverty.

The User Involvement Approach

The "user involvement" approach (Beresford & Carr, 2016: 4) is a theoretical orientation for participation processes. It is well established in practice and research as well as in training projects in social work and health care in Switzerland and internationally (Beresford, Branfield, 2006). Authors referring to the "user involvement" approach all give weight to theoretical concepts such as empowerment (Herriger, 2014), participation (e.g. Zask, 2011, Chiapparini, Eicher, 2019), co-design (Thallmaier, 2014) or the capability approach (Sen, 2000), although with certain differences. A clear definition of the "user involvement" approach is hindered by the fact that clarification as to whether it is a theoretical approach, a method or a goal, is still pending in the professional discourse. The voice of those affected and their view on social issues moves to center stage, with parallels to social movements (Kern, 2008, Herriger, 2014). The user involvement approach can be defined by five central aspects (Schön, 2016, Chiapparini, 2016, McLaughlin, 2009) which interact with each other to varying degrees:

- understanding a case in a more differentiated way
- valorization of the reflected experiential knowledge of the person concerned
- focus on the cooperation between addressees and professionals

¹ e.g. in citizen science projects ([Citizen-Science-Projekte - Schweiz forscht](#)) or in digitization and the resulting digital divide (Chiapparini et al, 2023)

- reducing the power imbalance between the two groups of people
- developing longer-term projects

Innovation in project development is only possible through the participation of those affected. To summarize, it can be said that "user involvement" revolves around the cooperation of the people concerned (i.e., using a service, a tool, a space) and the professionals (from different disciplines). In addition, the shift of power relations between the two groups of people (professionals and users with experiential knowledge) is a central aspect of the "user involvement" approach. Additionally, the strengthening of resources is important in the "user involvement" approach, as it is also emphasized in the capability approach (Sen, 2000) or regarding empowerment (Herriger, 2014). The "user involvement" approach, however, goes a step further: it emphasizes the close connection of resource strengthening with structural change, such as the possibility of participation in the processes and measures of social institutions or universities, as well as the training of professionals in the social, health and political sectors as framework conditions. Strengthening individual and community resources is central and, based on the numerous theoretical points linked to social movements (Kern, 2008), recognizes the actor-centered view of civil society as being of particular importance. Finally, theoretical and conceptual foundations of participation flow with varying intensity into all the approaches mentioned. A special feature of the "user involvement" approach is that both the framework conditions and the forms of participation and involvement are relevant.

So, the "user involvement" approach (Beresford, Carr, 2016) as well as the Poverty-Aware Paradigm (Bray et al., 2019) assume both that people in poverty must be supported in fighting their unjust living conditions by developing their ability to exercise their rights (Chiapparini, 2016). At the same time, private and public support services must recognize their needs and make support accessible (Bray et al., 2019, Chiapparini, 2016, Chiapparini et al., 2020) so that people in poverty can be reached and supported effectively and their health does not deteriorate so drastically. The poverty-aware paradigm and user involvement approach include both participative methods, to refer to both the individual and structural levels in projects, and thus to the empowerment of the people in poverty and the social mission of those working with them from private and public institutions and stake holder in poverty policy. The latter includes political, economic and social decision-makers.

Poverty and the experiential and professional knowledge in poverty policy in Switzerland

International poverty analyses indicate that the combination of financial, material, health-related, cultural, social and participatory elements influence the experience of poverty on individual, community, institutional and state levels (Bray et al., 2019, Chiapparini et al., 2020). There are almost no stakeholder organizations or lobbying activities for people in poverty (ibid.). The topic is considered a taboo in Switzerland and the heterogeneous nature of people in poverty makes it difficult to identify them statistically as a group (ibid.). These characteristics of poverty in combination with different life situations and personal or financial resources lead to varying consequences of poverty, which must be considered when addressing poverty. Basic typologies of people living in poverty include 1. young adults with no career prospects,

2. single parents, 3. migrant families in the low-wage sector, 4. unemployed people over 50, 5. self-employed people (Federal Statistical Office, 2023). Health impairment and lack of social contact increase the complexity of identifying and collecting data on people in poverty, making it more difficult to reach them with information and support services. They are often socially excluded, have reduced self-efficacy or an increased sense of shame (Chiapparini et al., 2020) and are deprived of the ability to lead the lives they want (cf. Amartya Sen's capability approach (Sen, 2000)).

It is undisputed in professional discourse that people experiencing poverty and the user organizations with an advocacy mandate should be involved as a collective. In particular, the user organizations play a central role, as they represent the interests and concerns of people experiencing poverty and support as well as promote people experiencing poverty in participation processes. Compared to Germany and Northern European countries, Switzerland has a high percentage of people living in poverty and it is a large population group in Switzerland in terms of numbers: 745,000 people affected by poverty (Federal Statistical Office, 2024a) and 1,244,112 people at risk of poverty (Federal Statistical Office, 2024b).

State of research based on the user involvement approach

The international findings on the positive impact of projects based on user involvement focus on evidence of good practice, i.e. that it works, rather than on rigorous empirical testing. The few studies that have been conducted suggest that the involvement of experiential knowledge of users of social services optimizes the collaboration between professionals (front line workers and managers) and people living in poverty and increases access to social benefits (De Corte, Kerstenne, 2015, Boxall, 2012).

In Switzerland, user organizations promote peer networking for people living in poverty (e.g., Planet 13, ATD, Surprise or Caritas), and several research projects on processes and measures of poverty policy (structural political level) are being conducted, drawing on the experiential knowledge of people affected by poverty, e.g., mandated by the National Platform for Preventing and Combating Poverty².

Evaluations of previous implementations and forms of participation commissioned by the National Platform for Preventing and Combating Poverty (2019-2024) (Stern, 2024) have shown that although there are projects and initiatives in Switzerland that promote the participation of people affected poverty in poverty policy, these are primarily one-off individual projects (Müller, Chiapparini, 2021). Through permanent participation structures and training for people involved, however, the positive effects of participation of people affected poverty in social policy can also be realized in the long term. This includes the improvement of processes and structures in organizations, more targeted measures and interventions or better cooperation between professionals and people affected by poverty. It is therefore necessary and sensible for Switzerland to establish a permanent structure of participation and training for those involved in the near future, also in view of the proven and positive developments of permanent participation structures in other countries.

Permanent shareholding structures and training developed in different European countries and Canada. They have different names and are organized in different ways.

² National Platform for Preventing and Combating Poverty <https://www.gegenarmut.ch/beteiligung>.

Further, previous projects involving user involvement have shown that it is not enough for all participants to be familiar with these approaches to achieve genuine participation rather than pseudo-participation. Rather, it is important to apply the principles of the user involvement approach in specific projects and to work together with people affected by poverty (experts with advanced knowledge based on their experience of poverty) and professionals from social services, politics and business (professional knowledge) on a specific project, to reflect on one's own actions and to facilitate learning processes for all participants.

Methodology

To answer the research question *How can people affected by poverty be given a voice in the structures and decision-making processes of poverty policy, based on the user involvement approach?* I include results from two project, because they both relate to the user involvement approach at a structural level and the processes have already been evaluated:

a) The research-based development and concept of the implementable platforms on the national level of poverty policy: **Council for Poverty Issues in Switzerland** (Chiapparini et al., 2025):

An interdisciplinary team from the Department of Social Work at the Bern University of Applied Sciences (BFH) and the University of Applied Sciences Western Switzerland Fribourg (HESSO/FR) was commissioned by the National Platform for Preventing and Combating Poverty to develop a concept for establishing a permanent participation structure for people experiencing poverty and their organizations in Switzerland, with the involvement of the relevant stakeholders.

b) The evaluation of the **training** on cantonal and regional level of poverty policy: **Think tank for the sharing of experiential and professional knowledge and developing innovative projects** (Chiapparini, Bitsch, 2024):

The training sessions for involved people in the project were based on the user involvement approach and were developed by a team from the Department of Social Work at the Bern University of Applied Sciences (BFH).

Both projects were financially supported by the National Platform for Preventing and Combating Poverty, and the training was financially supported by the Canton of Glarus and the Glarus Social Fund during its second implementation.

Both projects follow the same methodological approach of three steps:

1) *Internet and literature research and use of prior knowledge:*

Identifying and analyzing existing permanent participation structures and trainings in other countries: As a first step, the research team drew on its own existing expertise and international networks and systematically various examples of functioning, sustainability-based participation structures in an international context on the internet and in literature databases based on specific criteria. In addition, specialized and research-based literature on the topic of participation processes and their potential impact in poverty policy was included. Six condensed and empirically substantiated basic elements (e.g. objectives, members or addressees) emerged from the subsequently analyzed data material, which was used as orientation for the next step.

2) *Participatory development process for the proposal*

People affected by poverty and relevant organizations as well as, in an advisory capacity, professionals from various poverty-related areas of administration and social work were involved in the participatory process.

Specifically for the Council for Poverty Issues in Switzerland (a), this meant the following: The basic elements were developed in a multi-stage participatory development process with people experienced in poverty and professionals from various poverty related areas of administration and social work.

The participation process comprised various working formats: a kick-off event, two consecutive workshops, an information event for specialists and four half-day sessions with a feedback group consisting of people affected by poverty. The feedback group advised the research team on the implementation of the participation process and in the writing of the final report. In total, around 50 people affected by poverty from French- and German-speaking Switzerland took part in the participation process and around 15 professionals participated in an advisory capacity. This number of participants meant that over 50 organizations, NGOs and cantonal or national administrations were involved in the development process.

The individual events were organized in a variety of ways: smaller and larger group work (groups of three to ten), working in plenary, discussing and recording the advantages and disadvantages of an aspect or weighting positions by giving points, as well as adopting decisions with a veto right (with consent procedure).³ Consent describes a group format for decision-making. In contrast to consensus procedure, it is also possible to allow contradictions to remain in the process and decisions can still be made. This happens as soon as there are no more serious and justified objections (Grüttler, Bruse, 2022).

The process designed in this way enabled the people experiencing poverty to position themselves collectively, considering the feedback from the professionals mentioned above, on the most important basic elements of a permanent participation structure in Switzerland.

3) Development of a well-founded and realizable proposal

Based on the preliminary work in step one and two, the research team drafted a concrete proposal for a permanent participation structure: the "Council for Poverty Issues in Switzerland" (a).

The Council consists of decision-making members (people affected by poverty), advisory members (experienced and well-connected professionals in poverty policy) and a permanent secretariat comprising methodological, strategic and administrative support staff (people affected by poverty and professionals in poverty policy and academia).

The Council maintains regular contact with 1. Decision-makers in politics, administration and civil society at national, cantonal and municipal level, 2. People experiencing poverty and organizations representing those affected, 3. Professionals in poverty policy, the public, the media and other individuals from politics, administration, social work, business and academia and meets once a month.

³ The methods are documented in more detail in the respective programmes in the appendix, as well as in the sub-chapters "Brief information on the implementation of the methodological approach of the workshops" (see Sections 7.2, 8.2, 9.2, 10.2, 11.2 and 12.2 in: Chiapparini et. al., 2025).

At the beginning of the writing process, the idea behind the proposal and the table of contents were discussed with the feedback group consisting of seven people affected by poverty. In addition, the final product and specific questions about it were discussed with the feedback group in an additional meeting.

The think tank and project development (b) are based on proven teaching units at Lund University, each lasting one semester (Kristiansen, Heule, 2016). These fundamentals have been condensed into six course units (including a public evening event) lasting three hours each.

The different work steps and contents of the think tank and training were continuously evaluated with the participants and within the project team in the form of a reflective assessment (Chiapparini, Bitsch, 2024). The evaluations focused primarily on the participants' insights and were collected and recorded through open dialogue and an open-ended written questionnaire. At the end of the project, comprehensive written, graphical (a cross can be placed in a graph on a specific topic) and anonymized feedback was obtained from the participants. The entire evaluation results were evaluated and analyzed using qualitative content analysis (Kuckartz, Rädiker, 2022) and summarized in evaluation results.

Results

In the following chapter, I present the findings from both studies, which include the potential effects, challenges and conditions of the implementable Council for Poverty Issues in Switzerland (cf. 6.1.) and the training in and developing of projects for professionals from politics, economics and social services, as well as for people affected by poverty (cf. 6.2).

Positive impacts and conditions for the Council for Poverty Issues in Switzerland

The positive potential impact of the council can be summarized for three target groups:

1) for professional organizations, administrations and politics:

- direct access to knowledge, experiences and perspectives of people affected by poverty and increased awareness of the issue of poverty

- mutual understanding and clarification of misunderstandings between those affected professional stakeholders involved in poverty prevention and reduction

- visualizing blind spots among professionals from politics, social work and business

- improved cooperation and communication between people affected by poverty and the respective players.

2) for people affected by poverty:

- access to information and acquisition of knowledge

- building and utilizing skills

- experiencing appreciation, understanding and belonging

- taking responsibility and utilizing room for maneuver

- strengthening self-esteem and self-efficacy (empowerment)

- improvement of social integration

- better understanding of the options for action available to professionals in politics, social work and business.

3) for society:

- improved effectiveness in poverty reduction and prevention
- dismantling prejudices
- strengthening social cohesion.

Further, the council can achieve the following positive effects in a distinctive manner:

- processing of **collectively formulated statements** by people affected by poverty themselves.
- **empowering and strengthening the participation skills and interdisciplinary competencies** of both, people who have experience of poverty as well as professionals from politics, social work and business.
- **cooperating** among people affected by poverty, professionals and other stakeholders in poverty policy is strengthened.
- This in turn has a positive effect on the **legitimacy of the position statements** of people affected by poverty, because the issues addressed correspond to the interests of a broad group. Bringing together different interest groups in poverty policy also strengthens the representativeness of and identification with the position statements and thus enables mobilization for the call to implement them.
- **developing more effective solutions** that bring economic benefits (e.g., solutions that enable people affected by poverty to be weaned off welfare more effectively).
- promote the **recognition of poverty as a structural and social challenge** (and not as individual guilt).

At the end of the project, we found positive effects for the further development and implementation of the council. The participants in the developing process made themselves available to serve on the core group of the council (which includes both people affected by poverty and professionals from politics, business and social work). In addition, the Federal Council's review of the proposal and the associated media work and academic publications made it possible to raise public awareness of the issue and the council's proposal. This was met with positive interest.

The challenges facing the implementation of a council can be met by ensuring that the necessary conditions for a council are fulfilled. I will therefore discuss these conditions below.

A key finding of the analysis and a key condition is that six dimensions need to be defined in order to successfully implement a permanent structure. These dimensions can be formulated as questions and, where possible, should be answered together with the people affected by poverty and professionals.

The analysis crystallized six main questions that arise in connection with the implementation of a permanent participation structure:

1. What is the aim of a permanent participation structure? (aim)
2. Who participates in the permanent participation structure? (members)
3. Who does the work of the permanent participation structure address? (addressees)

4. How does a permanent participation structure work? (functionality)
5. What resources are needed for a permanent participation structure? (resources)
6. Who finances the permanent participation structure? (financing)

I will formulate the most important findings along these six dimensions below.

1. Aim:

The participatory process used made it possible to set clear and explicit goals that were confirmed by all participants. This added value achieved through participatory processes emphasizes the strong will of people affected by poverty to engage proactively to be heard by policy makers. They clearly want to go beyond a purely consultative approach (consultation). In our opinion, the objectives defined in the participation process seem to correspond to the findings from the literature review in which the two main objectives identified are addressed (1. assessing the business of poverty policy and 2. dialogue among all players involved in poverty policy). In addition, the people affected by poverty clarified the mandate as far as possible (avoiding ambiguity) and secured a certain amount of justified autonomy (e.g. room for maneuver or being able to make suggestions). The extent to which people affected by poverty experience stigmatization also came to light once again. Objective 5, which relates to raising public awareness of the need to reduce prejudice, reminds us that effective measures are urgently needed at this level.

2. Members

Both the literature review and the workshops highlight the need to place the voices and expertise of people affected by poverty at the center of the permanent participation structure. It is also important to give them sufficient space and time to develop a collective voice before a dialogue with other players takes place.

The advantages of basic cooperation with other players become clear in terms of the legitimacy and credibility of the voice of people affected by poverty (e.g. these players can act as supporters or even advocates). In addition, familiarity is promoted in their cooperation as well as the systematic linking of the statements and further activities of the structure to different target groups, such as decision-makers in politics, administration and civil society.

In this sense, regardless of the different models discussed, the aim is to allocate the main decision-making power (in terms of content/strategies/output of the structure) to the people affected by poverty and at the same time to mobilize the other actors in support of the issues under consideration. It remains open as to what extent which other actors should be members of the structure or outside the structure. One way to fulfil this requirement is to combine different degrees of participation and assign different responsibilities to the people affected by poverty and other actors.

In addition, the research team recommends prioritizing systematic cooperation with professionals from politics, social work and business for the time being, rather than entering cooperation with other stakeholders. These professionals should be located at the organizational level of the permanent participation structure within this structure and given an advisory function. The other stakeholders should be located outside of the structure and assigned the function of exchanging of views.

According to the research team, in the context of Swiss social policy, which attaches great importance to the diversity of the population and political participation, it is worth locating the decision-making authority over the participation structure primarily with people who have experience of poverty, because people affected by poverty in Switzerland have had little to no voice in social policy to date.

3. Addressees

Based on the results of the literature review and the workshops, the research team emphasizes the importance of ensuring proximity between the permanent participation structure and the political decision-makers.

In this sense, it would be ideal if, as a first step, the permanent participation structure was integrated into an existing decision-making organization chart at federal level. The main aim is to ensure that the decisions taken at this level automatically submitted to a consultation process with the future permanent participation structure.

As there is no legal basis for this in Switzerland, there is a need for a permanent participation structure that establishes such participation processes in political, administrative and civil society institutions and provides even more targeted support for people affected by poverty in their efforts to impact decision-makers in politics, administration and civil society. In addition, courses of action and processes could be identified to increase proximity to decision-makers in politics, administration and civil society. In Switzerland, for example, the permanent participation structure could be included in the list of organizations to which political offices send consultations.

In addition, the permanent participation structure must be categorized within Switzerland's federalist social system, which has different decision-makers in politics, administration and civil society:

Social insurance is allocated to the federal level, while social welfare and the implementation of federal decisions are allocated to the cantonal and communal levels. The Swiss Conference on Social Assistance (SKOS) has a coordinating function for the individual cantons regarding the SKOS guidelines, but not in other social policy matters. The guidelines are by no means implemented in the same way in all cantons, nor are they enshrined in law and therefore binding in every canton.

Against this socio-political background, the central and potential addressees for the permanent participation structure are located at these three political levels. Individual examples are given below:

- at the federal level: e.g. the responsible federal councilor or the Federal Office for Social Insurance
- at the cantonal level: e.g. the cantonal government councilors for the social welfare directorate, The Conference of Cantonal Directors of Social Affairs (SODK) or SKOS
- at the municipal level: e.g. municipal and city governments.

Even in centralized systems, it has been proven as useful to create regional structures (e.g. in France). This is particularly important in a federalist system such as Switzerland. It is therefore worthwhile (as in Canada, for example) to first focus on the addressees at federal level to then address the connections with cantons and local activities, which have different regulations, offers and possibilities and at the same time define social policy laws and measures at cantonal or municipal level.

In the medium term, it is therefore advisable to dovetail the permanent participation structures at cantonal and federal level, as poverty policy is shaped at cantonal level.

Furthermore, in cantons where participation activities with people who have experience of poverty are already well advanced, it makes sense to build on existing structures and experiences with participation processes on the part of people affected by poverty and professionals from politics, social work and business. In addition, other effective addressees such as the media or interest organizations, e.g. the social work union AvenirSocial⁴, NGOs and organizations of those affected (for political lobbying), should be targeted centrally and with great effort, especially in the constitutive phase up to the implementation of the permanent participation structure. Their commitment is necessary for the successful introduction and continuation of the participation structure.

4. Functionality

Despite their different modes of operation, "committee/council/commission" and "conference, meeting or network", both formats provide spaces for dialogue between people affected by poverty and decision-makers in politics, administration and civil society.

The "committee/council/commission" format is certainly more effective due to the direct contact with the decision-makers. This allows people affected by poverty to be consulted directly on measures and developments in poverty policy and to initiate initiatives (which requires, for example, a high level of responsiveness and immediate feedback from people affected by poverty). This format thus achieves a greater and more direct influence on political decisions in poverty policy. However, this service can only be guaranteed if the necessary resources are secured (see 5). These resources can vary, depending on the composition (only people affected by poverty or "mixed" with professionals) and the number of members and can thus be controlled: e.g. large labor input for all participants.

The "conference, meeting or network" format has a greater distance from the decision-makers in politics, administration and civil society, so that the concerns and work of the conferences have a longer and more indirect path to the political decision-makers. At the same time, this format seems to be particularly conducive to the goal of raising awareness of the issue of poverty (see sub-chapter 1 Aims).

5. Resources

As the findings from the literature review show, it is crucial to not underestimate the resources to be deployed in order to avoid various risks associated with participation processes.

In addition to logistical and financial resources, the implementation of such a permanent participation structure requires the long-term support of a permanent secretariat with various competencies. This should ensure the continuity of the structure by performing a range of tasks:

- strategic support (e.g. prioritization of activities and timetable)

⁴ <https://avenirsocial.ch/>

- methodical and didactic support (e.g. neutral moderation, preparation and management of meetings with methods for participation processes, the time frame and clear information on what is involved)
- preparation, information and training of all participants (people affected by poverty and other actors)
- support in the development of position papers
- logistical, financial and administrative management.

It is essential to ensure compensation for the costs and participation (hours attended) of people affected by poverty. After all, their experience and commitment are just as relevant as professional or scientific knowledge for the further development of poverty policy.

They should therefore be valued accordingly. Ideally, an agreement on the specific modes of compensation and the introduction of a possible advance on costs should be discussed and negotiated with the people involved who have experience of poverty.

5. Financing

Ideally, the main funding for the permanent participation structure should be provided by the state. This is because experiences with projects for the participation of people affected by poverty shows that public funding guarantees the continuity of public and varied activities of the permanent participation structure.

In addition to continuity, public funding also ensures greater credibility and legitimacy and has an impact on the work that emerges from the permanent participation structure, and which aims to optimize poverty policy and raise public awareness.

However, financing by the state can give rise to concerns that the structure might lose its independence. A mandate (e.g. from the Federal Social Insurance Office) is useful to this end in order to guarantee a certain degree of "neutrality". As soon as the state has taken over the financing and mandates the project, the services to be provided must also be clarified and state independent decision-making spaces for the organization of people affected by poverty must be ensured.

Positive impacts and conditions for the training and project development for professionals from politics, economics and social services, as well as for people affected by poverty

The positive impact potential of the training and project development for professionals from politics, economics and social services, as well as for people affected by poverty are like those summarized in section 6.1 for the council.

The training format and project development place particular emphasis on self-reflection among participants (people affected by poverty and professionals from politics, economics and social services), especially regarding the development of their participatory skills. Another added benefit of this format is that the combination of practical experience and professional knowledge results in a sustainable product that is presented to a wide audience in politics, economic and social work, thereby establishing a network for the further development of the project and raising awareness of the issue of poverty and the practical experience of people affected by poverty.

The participants' experiential and professional knowledge, combined with their freedom to choose project topics, resulted in innovative projects that were taken up by public and private social institutions. This meant that their voices and concerns were heard, deemed useful and followed up on.

The challenges facing the implementation of the training and project development can be met by ensuring that the necessary conditions for it are fulfilled. I will therefore discuss these conditions in general and regarding didactics below.

General conditions:

- The **commitment** of the participants, the **clear division** of tasks between the participants and the training team, and straightforward **communication** provided a stable basis on which the training could build upon.

- The **support of the training team in recruiting training participants** ensured that both professionals and people affected by poverty were equally accessible. In addition, it was ensured that the **travel expenses** of those affected by poverty were reimbursed in an uncomplicated manner and that **information** about the course was **disseminated widely**, including door-to-door, to ensure open access.

- On the first day of the training, both professionals and people affected by poverty expressed confusion about **the aim of the course** and their role in it. As a result, participation was defined more **by existing relationships** than by the content. It is worth considering whether the benefits and objectives of the training could be explained in more detail in the written and verbal invitations and whether the role of the participants could be clarified. At the same time, it seems that this is only really established and understood **through the activities in the training** (cf. learning by doing and think tank approaches to poverty). This could be given greater emphasis in the next training and replace the description of the training.

- The cooperation between the participants and the training team was based on **positive group dynamics**, which enabled valuable and direct peer feedback and an open culture of discussion in which critical feedback was also allowed and even welcomed. This improved the quality of the work and enabled a noticeable learning process for the participants and course instructors.

This positive group dynamic can be attributed to **several factors**: the inviting premises, the refreshments and snacks provided to encourage informal exchanges during the breaks, the willingness to engage in a constructive feedback culture, and the positive and motivated attitude of all participants, which was evident during the first afternoon of the module.

- The diverse premises (sitting area, standing tables, two meeting rooms) for the specialist course were perceived as **conducive to learning**. This was particularly the case as there was sufficient space for discussions and input in plenary sessions, but also for individual group work.

- The realization that cooperation between professionals and people affected by poverty is a **time-investment** can be highlighted. 'Involving experts with own experiences requires more effort for the project outline than "just" involving professionals.' (Quote from a professional) It can be concluded that the added value of combining professional and experiential knowledge must be linked to an **investment of**

time and to skills that promote participation: **mutual willingness to learn, understandable language, clear objectives and respectful communication.**

Didactic conditions:

- The **research-based input** and joint topic search on the first afternoon of the module were found to be helpful in ensuring a successful start to the training and clarifying the course objectives.
- As the course progressed, participants found the balance between short research-based input at the start and **sufficient time for project outline development in groups, peer feedback and professional support for the groups** to be beneficial.
- It became apparent that the participants in the small groups had very different work and everyday commitments, which made it impossible for the groups to meet between the individual training modules to work on their outlines together. At the same time, the **six training afternoons** that were already planned were a challenge for the participants, as they had to take this time away from their work and everyday commitments. The participants and the training team considered the timing and time commitment of six four-hour module days for the course to be appropriate. They viewed this as positive, as they would not have been able to devote more time to the training and were pleasantly surprised by what was achieved in such a short period.
- **Heterogeneous approach to presentation:** The idea of presenting the project outlines to a broad professional audience motivated most participants. However, the presentations were perceived as challenging in some cases by both the professionals and the people affected by poverty: on the one hand, the participants felt happy and proud to present their project ideas in public. On the other hand, some of the participants were not used to speaking in front of large groups of people. In addition, some of the professionals had colleagues and acquaintances from other contexts in the audience, or they were presenting on a topic that went beyond their area of expertise or belonged to a different field.
- For the participants, the evening event provided **a platform where they could present their concerns** in the form of a project outline developed jointly with professionals from politics, economy and social work. In addition, motivation was strengthened by the positive response to the social significance of all six projects.
- The **reception after the presentations** was particularly positive, as it gave participants and the training team the opportunity to talk to interested key figures from different fields, gain a more nuanced appreciation of the project ideas developed and network with each other.
- The evening events **raised awareness about the issue of poverty** among the audience and the media and even during the course.
- When preparing presentations, participants should also be given support in identifying **alternative formats** if they do not want to present or find it very difficult to do so. Examples of alternative forms and different types of participation should be highlighted verbally in a positive manner during the group work and at the evening event, e.g. designing graphics, jointly developing ideas and presentations, administrative work 'behind the scenes'.

Conclusion

After referring to the user involvement approach and presenting the findings from the two research-based projects 'Council for Poverty Issues in Switzerland' and the training in project development for professionals from politics, business and social work and people affected by poverty, I conclude this article by answering the research question mentioned at the beginning.

In order to give people affected by poverty a meaningful voice in poverty policy and to achieve the potential impact outlined above, including developing more effective solutions that bring economic benefits, the continuity of participation projects, the credibility and legitimacy of the collective statements and concerns developed, certain prerequisites must be met.

- a sharing structure supported by social policy administrators and led by external experts, e.g. a council for poverty issues or a training with developing projects
- the sharing structure is adapted to the socio-political conditions of a country and is being developed together with people affected by poverty, or at least their feedback must be obtained and discussed when designing the platform and to adapt the platform accordingly
- the sharing structure consists of participants with experiential and professional knowledge
- for the sharing structure the following elements are clarified and transparent communicate: the aims, members, addressees, functionality, resources and financial situation
- general condition for the sharing structure, e.g. willingness to learn, strengthening of positive group dynamics, a comfortable workplace, compensation for travel expenses, clear language, transparent communication, flexibility and time
- didactic condition for the sharing structure, e.g. variety of work forms, a group format for decision-making (consent) and heterogeneous approach in giving inputs
- it is worthwhile to pursue longer-term projects to maintain and further develop the network of people affected by poverty, organizations representing those affected, and professionals in politics, business, and social work.

In addition to the two formats presented and discussed here, there are many others that give people affected by poverty a voice in social policy, thereby ensuring effectiveness, continuity, credibility and legitimacy in these decisions.

However, it should be noted that potential effects have been identified, but further long-term impact analyses, if possible, on an international scale, are necessary to gain comprehensive insights.

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Ethical Standards

The author affirms this research did not involve human subjects.

RETHINKING SOLIDARITY THROUGH WELFARE TECHNOLOGY FOR OLDER ADULTS

Brita Gjerstad <https://orcid.org/0000-0001-7413-3664>

Ph.D., Associate Professor, Institute of Social Studies, University of Stavanger, Norway. Email: brita.gjerstad@uis.no

Inger Lise Teig, <https://orcid.org/0000-0003-0093-1684>

Ph.D., Associate Professor, Department of Global Public Health and Primary Care, University of Bergen, Norway. Email: inger.teig@uib.no

Abstract: The welfare state is under pressure. Demographic changes, high expectations for services, and limited resources demand new approaches to service provision. In Norway, national authorities advocate for the use of technology and the involvement of volunteers in health and care services. This paper explores the relationship between solidarity, technology and volunteerism by asking whether the use of technology in health service delivery aligns with the values of solidarity. The empirical basis of the paper is qualitative sub-studies from the research project *Caring Futures*, as presented in three articles. The sub-studies reveal that technologists strongly support increased use of technology. By framing technology as a means to promote autonomy, they implicitly downplay human dependency. As a result, technology appears to conflict with a concept of solidarity rooted in mutual interaction. In contrast, relatives of nursing home residents recognise and accept dependency. Rather than attempting to eliminate it, they embrace dependency as a foundation for social connection, mutual responsibility and solidarity.

Keywords: *Autonomy, elderly care, solidarity, technology, volunteerism, welfare state.*

Introduction

The tax system plays a central role in redistributing resources to promote social welfare in a welfare state. Such a system fundamentally relies on solidarity across generations, from individuals with income to those without, and from the healthy to the ill. Some forms of solidarity are unconditional, meaning that direct reciprocity is expected. This is often the case with society's support for individuals with disabilities. However, in many, perhaps in most, cases, solidarity is underpinned by a sense of mutuality. It is shaped by both explicit and implicit expectations that those who receive support will, at some point, contribute to society. For example, welfare services for children are rarely questioned, as there is an expectation that they will become future taxpayers. Similarly, there is a broad consensus that older people deserve adequate services,



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having contributed through a lifetime of work and taxation. In contrast, solidarity with refugees is often more contested. This is partly because it is uncertain whether they can contribute economically to the future, for instance, through employment and tax contributions.

Every democratic welfare state depends on the support of its population. A decline in solidarity thus poses a significant threat to its sustainability. Today, welfare states face additional challenges due to demographic shifts observed in many countries. These include an increasing number and proportion of elderly people, and a shrinking working-age population, responsible for financing and delivering welfare services. Advances in medical care, which enable people to live longer with chronic illnesses, further intensify these pressures. Governments respond to these challenges in different ways. In Norway, for example, greater reliance on technology and volunteerism is being explored. Authorities are particularly optimistic about the potential of new technologies to enhance service delivery.

This paper explores how such technological developments might influence the concept and practice of solidarity. The central research question is whether the use of technology in health service delivery relates to values of solidarity. It is based on findings from a research project called "Caring Futures" as reported in three articles (Gjerstad et al., 2025; Hellstrand et al., 2024; Teig et al., forthcoming). The project aimed to generate research-based knowledge that contributes to the quality of technology-mediated care practices. The project revisited care ethics in practice - and experience-near contexts, at a time of changing health, care, and welfare policies, services, and practices, asking how technology-mediated care practices can become care-ethically sound, and, correspondingly, how care ethics can become more technology-aware. The findings presented in this paper are drawn from an interdisciplinary research project conducted in collaboration with national and international partners and funded by the Norwegian Research Council.

Background: challenges in the welfare state

Norway is one of the richest countries in the world. It offers extensive welfare and tops the league in Europe when it comes to resources used for health and care services (NOU 2023:4). The need for health and care services is nevertheless constantly expanding, not least because of the growing proportion of the elderly. And the population's expectations for services are high. Norwegian authorities are therefore concerned about increasing costs and lack of resources, particularly in terms of personnel. There is already a shortage of staff, as many health and care services have changed from being institution-based to home-based care (NOU 2023: 4). The shortage is estimated to increase (Saunes et al., 2020).

The costs have long given rise to concerns about the sustainability of the welfare state (Rahman, Skorstad 2018), and the demographic development adds to these concerns. In ageing industrial democracies, concerns about the fiscal sustainability of the welfare state are at the top of the political agenda (Goerres, Tepe, 2010). Luckily for Norway, except for a few years, the unemployment rate has been low over the last 50 years (ssb.no). It has not exceeded 5% since the early nineties. High employment is necessary because the welfare is mainly financed by tax revenues. To ensure high employment, in Norway as well as in other European countries, there has been a

development in welfare policy for many years where the right to benefits is linked to an obligation to actively contribute to reducing the need for the benefit (Kildal, 2012). For example, the right to unemployment benefits during unemployment is not only based on the previous job as it is also linked to an obligation to actively seek jobs. Increasingly, sanctions are faced if one does not fulfil the obligations. In Norway, "The work first approach" as long been important in social policy (Halvorsen et al., 2022). The principle refers to a policy that prioritises work and employment as the main means of achieving social inclusion and economic independence. The idea is that it should always be more rewarding to work than to receive benefits. This presents a dilemma for the authorities when determining the size of benefits. It should not be attractive to receive benefits, and consequently benefits cannot be too high. At the same time, there is an objective of avoiding poverty, which means that they cannot be too low. Critiques claim that the welfare principle expresses a lack of trust; as long as the benefit is small enough, the recipient will be able to fend for themselves (Halvorsen et al., 2022).

By linking entitlement to benefits to the fulfilment of obligations, the responsibility for one's own welfare was placed more on the individual. In general, social rights to benefits that "lie at the intersection of work and welfare" have been weakened in recent years by an increasing number of conditions and individual obligations (Kuhnle, Kildal, 2019). Some researchers see this development as a result of a neoliberal turn in social policy and social work, where social problems are made into individual problems (Kamali, Jönsson, 2018; Lorenz, 2016; Marthinsen et al., 2019). In addition to privatize what was previously part of public welfare services, neoliberal policies enter discourses about individual independence and responsibility (Lorenz, 2016). Lorenz (ibid.) claims that social work today is adapting to this by adopting various activation techniques and individualising follow-up work.

The fear of free riders can be seen as an aspect of this individualisation. A free rider is someone who benefits from the welfare state without making a fair contribution to its support. A key argument among some of the critics of the welfare state is the danger of many free riders. Free riders represent an economic challenge but also threaten solidarity (Cappelen, 2019). Experiments show that, in general, people are willing to contribute to public goods; however, if they suspect that others are free riders who do not contribute, their motivation to contribute sinks (Cappelen, 2019).

Both economic and social sustainability are topics in general discussions about the welfare state. When the discussion is limited to elderly care, the challenges are mostly about finances and staffing. Social sustainability, i.e. solidarity, is rarely questioned. This can be seen as an indication that the solidarity in the population with the elderly is strong. In Norway, the elderly are often referred to as "those who built the country". Norway has experienced significant economic growth over the past century, and the term refers primarily to those who have worked in industry, agriculture, fishing and other sectors that have been crucial to this growth, but also to those who contributed to the establishment of various social institutions. The term expresses recognition of a hard and long working life, and as such is often used to honour the elderly's effort. Although the phrase "worthily needy" is no longer acceptable in Norwegian policies, when used in debates about elderly care, the term "those who built the country" implicitly states that the elderly are "worthily needy". Not everyone is equally

enthusiastic about the concept and argues that both previous and later generations have contributed to the country's growth and development.

Nevertheless, there is broad agreement among the population, among all generations, that elderly care cannot be weakened. According to Dahl (2022), that is, however, exactly what has happened. She argues that although Nordic welfare states are often referred to as 'caring states', major changes characterised by neoliberalism and austerity have taken place. Media reports of cases indicate that sick older adults with massive needs are living at home without getting sufficient care. The documentary "*Omsorg bak lukkede dører*" ("Care behind closed doors") broadcasted by the Norwegian Broadcasting Corporation January 2023, showed persons who received public care services, but still did not get the medication, food or care they needed and were entitled to.

Technology as a solution to challenges

Already in 2005, technological solutions were presented as ways to increase productivity and reduce personnel requirements (Meld. St. 25 (2005-2006); Meld. St. 29 (2012-2013); NOU 2011: 17). To indicate more specifically which technology is involved, the concept "welfare technology" has been introduced. In Scandinavia, the term usually refers to technologies that in different ways support people in their daily lives in their homes (Zander et al., 2023). In this paper, we rely on a commonly used definition in Norway which states that welfare technology is "[...] Technology that can contribute to increased security, safety, social participation, mobility and physical and cultural activity, and that strengthens individuals' ability to manage for themselves in everyday life despite illness and social, mental or physical disability. Welfare technology can also function as technological support for the next of kin and otherwise help to improve accessibility, resource utilization and the quality of service provision. Welfare technology solutions can, in many cases, prevent the need for services or hospitalization" (NOU 2011: 11:100). Examples of such technologies are different sorts of alarms (for example, fall detection devices), and timers that deactivate devices like stoves and coffee machines after a defined time to prevent the devices from being left on when they should be off.

Norwegian governmental plans and strategies for welfare technologies are accompanied by guidelines, conferences and seminars, research programmes, and a National Welfare Technology program, all aiming at supporting the implementation of technology in the health and care sector. The authorities' expectations regarding technology in health and care services are very optimistic (Jacobsen, 2022; Kamp et al., 2019; Alvsåker, Ågotnes, 2022), as they are also in many other countries. Many studies view technology as a solution to the growing demand for healthcare services (Syeda, Syeda & Babbar, 2022).

Voluntary work as a solution to challenges

WHO promotes socially innovative community and voluntary-based services for older people, as do Norwegian authorities (Jenhaus, 2018). Care from family and volunteers is often a prerequisite for older people with significant care needs to be able to live at home. Relatives already account for a large part of the care of the elderly. For Norway,

calculations show that the total effort from relatives is of the same extent as the effort from the public health and care services (Daatland, Veenstra 2012). Younger seniors (i.e. people aged 60+) are the ones who contribute the most to voluntary work related to health and social services (NyAnalyse, 2017). Still authorities want care from relatives to increase, as well as informal care by social networks and local communities (Meld. St. 29 (2012-2013)). Current policy discussions emphasize the role of voluntary engagement in elderly care (Meld. St. 15 (2017-2018)), yet sustainable and structured models for such involvement remain underdeveloped. Moreover, demographic changes will also impact the availability of volunteers – an aspect that appears to have been overlooked in the political ambition to expand volunteer work (Blix et al., 2021). In addition, the potential for increased volunteering from the 50–80 age group is conditioned by several factors (Hansen, Slagsvold, 2020). A survey showed that relatively few of the 4,000 participants in the study were willing to commit to volunteering, and only half were willing to participate in volunteering even if they were allowed to decide the scope and timing. Qualitative research also indicates that older adults engaged in volunteering do not always want to contribute in the ways, or through the activities, that health and care services expect or prioritize (Blix et al., 2021).

Same objectives, different means

Technology and volunteerism are two fundamentally different solutions to the same problem. While there has been relatively little attention paid to the political desire for more volunteer work in health and care services, the focus on welfare technology has been discussed and explored through several studies.

Many have been critical of plans to use more technology in health and care services. In general, technology is associated with values such as efficiency, speed, productivity, resource exploitation, simplification, and accuracy (Kjøllesdal, 2010). It develops fast, and ethical guidelines may therefore not be up to date. Technology is based on, and expresses, an instrumental rationality: it is a means to an end (Hofmann 2010). Hofmann contrasts this instrumental rationality with the concept of care, which is inherently relational and grounded in compassion, competence, confidence, conscience, and commitment – framed by sharing understanding and mutual respect (Cronquist et al., 2004). Care holds intrinsic value. While technology may be guided by good moral intentions, there is a risk that instrumental rationality could encroach upon the domain of care, for instance, when human contact is replaced by machines (Hofmann, 2010).

The fear of technology becoming too dominant is not new. Ellul (1964) claimed already in the 60ies that society is governed by technology. Perceptions that technological development "takes over" and becomes governing for us, so that we must adapt to it and not vice versa, are well known in social sciences and referred to as "technological determinism". According to Ellul (1964), technology encompasses all aspects of modern society, which leads to all of society's problems being defined as technological. Consequently, attempts are made to solve them through technology. A modern example relevant to academics is students cheating on exams. It is described as a technological problem (it is due to the easy access to information via smartphones, iPads and computers), and it is attempted to be solved with the help of technology (computer programs that identify transcripts). Alternatively, one could have seen it as a

moral problem that one tried to solve with lectures on ethics, or as a methodological problem that one tried to solve by being clearer about how students should relate to the work of others. Another fear is that assessments will be based too much on perceptions of efficiency and productivity, and too little on other things, such as ethics.

Volunteerism can be seen as the opposite of technology. It serves a purpose, but still it is very much based on empathy and a desire to contribute to society without necessarily expecting anything in return. Hustinx and Lammertyn (2003) distinguish between collective and reflexive volunteerism. Collective volunteering is described by long-term and regular commitment and effort, most likely involving permanent organizational membership. It is often linked to ideologically or religiously based altruism. They are also motivated by others' expectations and sense of duty. Reflective (or individualistic, as they also are called) volunteers are more oriented towards the specific activity, or the cause it promotes, than group affiliation. Their organizational affiliation is loose, and they often participate for shorter periods of time. They might consider several options and choose the form of volunteer work that matches their own interests and expectations. In Norway, the findings from a survey among elderly show indicate that most people are reflective volunteers: only a minority is willing to commit six months to volunteer work or to adjust leisure and vacation in order to do voluntary work, and only 50 percent are willing to do volunteer work only if they can decide how much and when (Hansen, Slagsvold, 2020).

Authorities appeal to citizenship, shared responsibility and solidarity between generations (Meld. St. 29 (2012-2013)). When volunteer work is to be included as part of public services, problems may arise. Lorentzen and Tingvold's study (2018) documents challenges regarding recruiting volunteers and coordination between service providers and volunteers. Furthermore, the study shows a lack of agreement on the division of tasks.

Conceptualising solidarity

Solidarity is conceptualised in various ways. In everyday language, it is often understood as a form of sympathy that fosters unity and a willingness to act in the interest of others. Durkheim (as cited in Veiden, 2022) distinguishes between two forms of solidarity: **mechanical solidarity**, characteristic of traditional societies where individuals share common values, beliefs, and work; and **organic solidarity**, which defines modern societies marked by specialised roles. In societies with mechanical solidarity, cohesion arises from homogeneity, whereas in those with organic solidarity, it stems from interdependence. This interdependence is a product of the division of labour, which necessitates individuals relying on one another to fulfil diverse functions.

Norway exemplifies a highly specialised society. This is evident, among other indicators, in the fact that many professions, including practical roles such as cleaning, require formal education or favour educated personnel. At the same time, Norway is a welfare state that provides extensive services to its citizens. It can therefore be argued that the welfare state represents, to varying degrees, the institutionalisation of solidarity at the societal level, manifested through mechanisms such as unemployment benefits, national insurance (including maintenance obligations), and public health care (based on the insurance principle).

While these systems are the result of long-term political development, critics of the welfare state argue that they shift the responsibility for solidarity from individuals to an impersonal state. This may lead to a decline in personal responsibility for others and, consequently, a weakening of social cohesion. Archer (2013) offers a contrasting perspective on the role of the state. She does not oppose the welfare state assuming responsibilities traditionally associated with solidarity, but she emphasises the importance of the state actively fostering solidarity. According to Archer, this is especially vital in societies where traditional sources of cohesion, such as religion, shared culture, and common values, are in decline (*ibid.*). She underscores the relational nature of human existence, asserting that solidarity is cultivated through shared projects and mutual recognition. In other words, solidarity emerges from social interaction. Therefore, public authorities should play a role in facilitating these relational processes.

Methods

The discussion will be based on findings presented in articles from the Caring Futures project, in particular from a work package that focused on managers and advisors in municipal health and care services and technologists. This work package was a qualitative study that included nine individual interviews and four interviews with two participants each, altogether 17 participants. The participants were 1) five representatives of technology developers and suppliers, and 2) 12 advisors and managers within healthcare at different levels in the municipalities. We refer to them as “technologists” and “municipal participants” respectively, regardless of education and professional background. The technologists were involved with different technologies as they represented a company that offered GPS solutions, a company that offered medicine dispensers and a robotics developer company. The municipal participants were relevant, as while the central government holds overarching authority and supervises municipal practice, each municipality, regardless of size, serves as the main provider of welfare services across the country.

The interviews were conducted in 2022. They were semi-structured with open-ended questions, allowing the participants to talk about and reflect on their experiences and expectations regarding welfare technology. Separate interview guides were used for municipal participants and technologists, each featuring questions aimed at exploring their perspectives on 1) cooperation, 2) technologists’ responsibility and 3) the impact of increased technology use. Conducted via video calls, the interviews were recorded with participants’ oral consent and lasted about an hour each. All interviews were transcribed verbatim.

The discussion will also draw on a study of relatives’ experiences with and views on the use of technology in nursing homes. The study was another sub-study from the Caring Future project. The study consisted of eight qualitative interviews with altogether ten relatives of nursing home residents aged 54-79 years. As relatives, they had a caring relationship with spouses, parents, siblings or other family members, respectively, who all lived in nursing homes and had varying degrees of physical and cognitive functional levels.

Both studies were approved by the Norwegian Office of Research Ethics (now SIKT). Before the interviews, the participants were informed that participation was

voluntary, and they were informed about the study's details, including anonymity, confidentiality, and their right to withdraw at any time. Informed consent was obtained either via email or orally at the start of the interview.

Findings

Some of the key findings from our work package in the *Caring Futures* project were that technologists questioned the healthcare sector's capacity to provide adequate services to older adults and individuals with chronic illnesses (Gjerstad et al., 2025). In doing so, they aligned with a broader discourse concerning the challenges facing the health and care sector. Eager to contribute what they considered a much-needed solution, they strongly advocated for the implementation of technology. The notion that these challenges must be addressed through technological means has been repeated so frequently that it is increasingly perceived as an established truth. By aligning with dominant narratives about the sector's problems and proposed solutions, the technologists justified their claim to a central role as key actors within the healthcare sector (Teig et al., forthcoming).

Technologists stated that technology *is* care (Gjerstad et al., 2025). The main reason they could equate technology with care was that technology provides freedom and independence, something that the technologies believe is lacking in today's service delivery. As documented in Gjerstad et al. (2025:7), one of the technologists described this lack in the following way:

"Today, there are very many people who are deprived of the opportunity to live a more independent life. They are almost imprisoned in their own home. Because they will have visits from the home care services 2-3 times per day, only to give one dose of medicine in their hand." (Pill dispenser company A).

Gjerstad et al. (2025:8) also show that technologists think that the visits from the home care services "imprison" the patient as he/she has to be at home to meet the service providers. Patients should rather be independent:

"To handle one's own medication is extremely important. Independence, coping, flexibility, not the least in everyday life, is of value for patients who depend on a service and who have to wait for a service provider to come." (Robotics developer)

Technologists took the desire to be independent for granted. One claimed that being able to be independent and to fend for themselves instead of depending on others seemed to be deeply ingrained in people (Pill dispenser company A). In other words, independence was presented as a fundamental value, assumed to be universally desired. Similarly, other terms that were used, like freedom and flexibility, have very positive connotations.

While autonomy was applauded among all informants, healthcare personnel also reflected critically on the potential negative aspects of technology. One element in this regard was that more autonomy for the patient requires closer follow-up to ensure that the patient's condition is adequately monitored and to be able to detect and act on the deterioration of his/her condition. Another element presented by healthcare managers was whether more autonomy in healthcare services could safeguard a dignified life for older adults.

In the study of attitudes towards technology among relatives of nursing home residents (Hellstrand et al., 2024), relatives were engaged in the well-being of family

members residing in nursing homes. They visited them and helped them with different tasks. They also tried to ensure that the resident got sufficient care at the nursing home.

The study was conducted shortly after a period of COVID-19 restrictions, meaning that the relatives had been through a period where physical visits were not allowed. They understood and respected the need to keep a distance; however, they found it hard. This might have affected their attitudes, as they were positive about technology. At the same time, they did not see technology as a replacement for care and emphasised that the use of technology must not come at the expense of safe and good services.

They acted as drivers and suggested technology both for keeping contact with "their" resident, for communication with staff at the nursing home, and for communication between staff and the residents. Some of them reflected on the difficulties during COVID-19 restrictions and imagined that the physical distancing might have been less painful with the use of technological devices for contact. However, use of technologies would require support from staff, for example, in cases where the residents did not know how to FaceTime. The relatives were frustrated about the lack of support from the staff. One example was a relative of a resident with a hearing device. The relative feared that the staff did not understand or did not have time to take proper care of the hearing device (for example, to load the batteries).

One of the factors motivating the relatives to engage in the resident's situation was that they knew the resident well. They knew his/her needs and preferences, and they wanted the staff to know these and to take them into account. Relatives tried in different ways to communicate such information to the staff, but they could not see that the staff treated the resident according to the information. They did not know if the staff had not received the information or if there were other reasons they did not follow up.

Hellstrand et al. (ibid.) suggest that technology highlights the importance of other conditions, as the relatives' attempts to bring technology into the nursing home revealed how poor the communication between relatives and staff was and how stressful the staff's daily work was. According to relatives, technology can alleviate an already stressful situation for health personnel.

Does technology support solidarity in elderly care?

The empirical foundation for this paper is a series of interviews concerning technological devices primarily designed for the older adults. Accordingly, the form of solidarity under discussion is, first and foremost, solidarity with older adults. As previously noted, general solidarity with the older adults appears to be strong. Ageing is a universal phase of life. Everyone, barring premature death, will eventually grow old. Yet paradoxically, few people seem to want to be old. Resistance to appearing old, such as reluctance to use assistive devices like walkers, is widespread.

The World Health Organization (WHO) defines ageism as stereotypes (how we think), prejudice (how we feel) and discrimination (how we act) towards others or ourselves based on age¹. According to the WHO, ageism manifests in different contexts such as institutional settings, interpersonal interaction, and internalised

¹ https://www.who.int/health-topics/ageism#tab=tab_1.

attitudes. It most commonly targets older adults. Globally, half the population holds ageist attitudes toward older people, and in Europe, younger people report experiencing more ageism than other age groups. While some cultures associate old age with wisdom and respect, Norway is not typically seen as one of them. Although older generations are sometimes referred to as "those who built the country", there is also criticism that society marginalises them by placing them in nursing homes. Thus, societal attitudes towards the older adults can be described as ambivalent.

As described in the previous section, autonomy is a central theme in the context of welfare technology. It aligns with a core philosophical and political ideal that individuals are free, autonomous, and capable of self-determination. In health and care services, autonomy is a foundational principle, underpinning rights such as user participation and influencing policies on the use of coercion. The prevailing belief is that rational, free individuals are best positioned to make decisions about their own lives. Practically, autonomy is often equated with self-reliance – a view echoed by the technologists in our study. They see self-reliance as a means of liberating individuals from the limitations imposed by dependency.

This raises the question: Is the development and provision of autonomy-enhancing technology an act of solidarity? On the surface, it appears so. Technologists emphasise the urgent need for solutions in the healthcare sector and the benefits that welfare technology offers to older adults. However, their involvement is not purely altruistic – they also have commercial interests. Can their actions still be seen as part of what Archer (2013) describes as a "shared project" based on mutual recognition, which she identifies as a foundation of solidarity?

Nevertheless, this is debatable. It is difficult to view an industry driven by national policy frameworks defining healthcare challenges and solutions as a shared project between technologists and the older adults. One may counter this by pointing to efforts by authorities and technologists to involve users in strategy development, technology design, and implementation. Yet, much of this user participation appears to involve municipal staff rather than the older adults themselves. Initiatives rarely, if ever, originate from older adults. This casts doubts on whether the kind of social interaction Archer (2013.) associates with solidarity is truly present.

Durkheim (as cited in Veiden 2022) argued that in modern societies, social cohesion is rooted in interdependence. The division of labour creates a system in which individuals rely on others to perform roles they cannot fulfil themselves. This interdependence, he claimed, fosters solidarity through the complementarity of roles (ibid.). It is plausible to view the relationship between technologists, who develop and sell technology, and older adult individuals, who require assistance due to functional decline, as one of interdependence. Technologists possess the knowledge and resources to create solutions that older adults lack. However, it remains unclear whether this interdependence binds them together. One could argue that vast differences in knowledge, technological literacy, and lived experience may divide rather than connect these groups. It is important to note that our project did not include interviews with elderly patients, so we cannot make definitive claims about their perspectives on interaction and mutual recognition. However, we did gather data from municipal staff. A key finding from Gjerstad et al. (2025) is that staff continued to practice ethical care discretion in their care decisions and resisted pressure to provide technology when they

deemed it professionally inappropriate. Despite being expected to consider cost-efficiency, their resistance to technology, often seen as a cheaper alternative to personnel-based support, can be interpreted as acting in the patients' best interests rather than those of the municipality.

A similar question arises regarding the relatives of nursing home residents: Were their calls for more communication technology and assistive devices acts of solidarity? Unlike technologists, these relatives have no commercial interests. Their motivations appear to be improving communication and enhancing the quality of life for their loved ones – intentions that could be described as altruistic. However, applying Hustinx and Lammertyns' (2003) concept of collective or reflective/individualistic voluntarism complicates this view. The relatives' efforts seem to be directed toward specific family members, not toward broader volunteer work benefiting all residents. Nonetheless, familial bonds likely foster a sense of mutual cohesion. The informal, face-to-face nature of their interactions, talking, responding to requests, and offering help, suggests a recognition and acceptance of the resident's vulnerability. Rather than emphasising autonomy, the focus is on how the environment can best meet the residents' needs.

This could be interpreted as intergenerational solidarity, but the findings in our project (Hellstrand et al., 2024) suggest that such solidarity is largely confined to one's own family. That narrows down the solidarity. However, there are many examples of volunteerism where helpers and recipients are not related (in fact, some definitions of volunteer work do not include informal care that is carried out by family members), and which involve everyday interactions. This supports Archer (2013) claim that (everyday) interactions foster solidarity. In addition, the difficulties experienced by relatives' during their engagement in the wellbeing of their family members, suggest a need for better facilitation for informal care. Such facilitation can benefit from relatives' solidarity and strengthen their roles as volunteers.

Concluding remarks

Many studies have emphasised the welfare state's reliance on solidarity, arguing that a lack of solidarity poses a significant threat to its sustainability. However, in the Norwegian context, much of this research has focused specifically on public attitudes toward migrants and migrant policies (see Bay et al., 2007 for an example). In this paper, we highlight the significance of solidarity within other (policy) fields. While the relevance of solidarity in the context of voluntarism may be readily apparent, its importance in shaping our understanding of technology and autonomy is less often acknowledged. Technological solutions aimed at promoting autonomy can implicitly downplay or even deny the reality of human dependency. These solutions often align with an ideal of self-sufficiency, suggesting that the goal is to minimize reliance on others. However, this framing of autonomy does not easily align with a concept of solidarity grounded in mutual interaction and interdependence.

While independence may be empowering for some, it also risks reinforcing a cultural discomfort with vulnerability and dependence, particularly in old age. Recognizing and valuing dependency as a condition for social connection may be essential for fostering a more inclusive and solidaristic approach to care and technology.

Engaging volunteers acknowledges dependency as a legitimate and enduring aspect of the human condition. Volunteer involvement is grounded in the recognition that some individuals are unable to manage on their own and require the support of others. Rather than seeking to eliminate dependency, this approach embraces it as a basis for social connection, mutual responsibility and solidarity. It affirms the value of care and relational support, positioning assistance not as a problem to be solved through technological innovation, but as an essential expression of human interdependence.

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Conflict of Interests

The authors declare no ethical issues or conflicts of interest in this research.

Ethical Standards

The authors affirm this research did not involve human subjects.

THE RELATIONSHIP BETWEEN E-HEALTH LITERACY AND PSYCHOLOGICAL WELL-BEING: A COMPARATIVE STUDY AMONG YOUTH AND ADULTS IN SHIRAZ, IRAN

Sahar Hojatifar, <https://orcid.org/0009-0008-7434-3993>

Ph.D. Student in Sociology, Department of Sociology, Faculty of Economics,

Management, and Social Sciences, Shiraz University, Shiraz, Iran.

Email: Sahar.hojatifar@gmail.com

Majid Movahed Majd, <https://orcid.org/0000-0003-2004-7271>

Corresponding Author: Full Professor of Sociology, Department of Sociology, Faculty of Economics, Management, and Social Sciences, Shiraz University, Shiraz, Iran.

Email: mmovahed@rose.shirazu.ac.ir

Serajeddin Mahmoudiani, <https://orcid.org/0000-0003-3686-1171>

Associate Professor of Demography, Department of Sociology, Faculty of Economics, Management, and Social Sciences, Shiraz University, Shiraz, Iran.

Email: serajmahmoudiani@gmail.com

Abstract: One of the key factors in societal progress is the improvement and enhancement of individuals' psychological well-being. With increased psychological well-being, individuals gain the ability to solve problems and successfully overcome challenges. The aim of this study is to investigate the relationship between e-health literacy and psychological well-being among youth and adults in Shiraz, based on Neuman's Health Theory. This study employed a survey method, and the statistical population included all young and adult residents of Shiraz, Iran. Based on Cochran's formula, 600 individuals were selected through stratified random sampling. Data collection tools included questionnaires, and SPSS software was used for statistical analysis. The results indicated a significant relationship between e-health literacy and psychological well-being among both youth and adults in Shiraz. Additionally, multivariate regression analysis showed that the psychological well-being of youth and adults in Shiraz was similar, with no significant differences between the two groups. Based on the findings of this study and Neuman's Health Theory, the higher the level of e-health literacy in a society, the greater the psychological well-being of its individuals. Consequently, society and its members will experience less anxiety, stress, and preoccupation. Therefore, to enhance psychological well-being as a crucial dimension of health and a factor in societal progress, it is recommended to increase the use and improvement of e-health literacy with the help of community members and officials.

Keywords: *Psychological well-being, e-health literacy, youth-adults.*



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Introduction

Approximately 14% of global diseases are attributed to neurological and psychiatric disorders related to psychological well-being. These disorders are primarily due to debilitating psychological conditions that lead to other mental health issues. Studies on individual health emphasize the separate roles of mental and physical health in disability and mortality, which often results in neglect and alienation from psychological well-being. The burden of mental disorders is underestimated due to inadequate understanding, leading to severe health conditions (Prince et al., 2007). Psychological issues are prevalent in contemporary society, and individuals face various concerns. The best way to address emotional and psychological problems is timely treatment and prevention of their spread. Psychosocial well-being is defined as a state of mental, social, and emotional health for individuals. This broad concept encompasses various aspects of human life, including self-esteem, life satisfaction, a sense of purpose, happiness, and personal growth (Liu, 2024). Individuals with poorer psychological well-being tend to perform worse under stress and experience higher levels of stress. The higher the level of an individual's psychological well-being, the better their ability to cope with depressive factors and stressful conditions (Aldwin & Revenson, 1987).

Psychological well-being is becoming a central topic in public policy discussions, with its improvement and welfare being considered a fundamental principle in society. Psychological well-being and health are closely interrelated, and this relationship intensifies with age. Psychological well-being is influenced by various factors, including material conditions, social roles and activities, and social and family relationships (Steptoe et al., 2014). One of the significant factors influencing psychological well-being is the level of e-health literacy. Health literacy plays a crucial role in empowering individuals to use health information, understand, and access resources for making informed decisions about their health. Health literacy is particularly important in developing countries with lower health standards. E-health literacy fosters community participation and efforts to improve and enhance psychological well-being (Al-Worafi, 2023).

The term "e-health literacy" was rarely used before 1999 but has since become common to describe the use of medical information through the internet, or in other words, internet-based medicine. E-health literacy can be defined as an emerging field at the intersection of medical services, public health, and information provided through the internet and related technologies. E-health literacy aims to reduce costs and improve the quality of individuals' health. By providing health information through the internet, e-health literacy empowers individuals in a society. However, it also highlights inequalities in societies, particularly in developing countries where the gap between the rich and the poor leads to disparities in internet access and health standards (Eysenbach, 2001). E-health literacy includes individuals' skills and abilities to access, validate, understand, apply, evaluate, and interpret online health-related information (Petrić & Atanasova, 2024).

The stressful lifestyles of modern societies have led to numerous psychological issues, exposing individuals to countless risks. Adolescents, youth, and adults are particularly vulnerable to the worst psychological impacts, such as depression. To address such issues, increasing access to e-health literacy can help individuals use

technology, the internet, and its services to tackle various health issues, including psychological well-being. Daily life is influenced by various factors, and advancements in technology can help improve healthcare and accelerate communication (Srivastava, 2017). Individuals generally express satisfaction with e-health literacy and turn to it for their problems. It appears that e-health literacy and its impact on psychological well-being among youth and adults is a significant factor that emphasizes its effectiveness and acceptance in health (Struthers et al., 2015).

Therefore, it can be said that in today's high-risk society, individuals' psychological well-being is influenced by various risks and factors, and one of the ways to treat and prevent these issues is through e-health literacy, which can help address this problem. Youth are typically exposed to technology and digital tools from a younger age, while adults may not have the same experience. Additionally, due to education and profession, youth tend to use digital technologies more, while adults may have less need for these technologies. Thus, e-health literacy plays a crucial role in improving individuals' conditions, and this study aims to investigate the relationship between e-health literacy and psychological well-being, as well as the differences between youth and adults in Shiraz. Therefore, the main research questions are: Is there a relationship between respondents' psychological well-being and their level of e-health literacy? Does the psychological well-being of respondents differ based on whether they are youth or adults?

Theoretical Framework

Psychological well-being is a critical determinant of individual health, influencing various dimensions of well-being and serving as a pivotal factor in navigating the stressors of contemporary society. This study draws on several theoretical models to contextualize the relationship between e-health literacy and psychological well-being.

Baker's Health Literacy Model

Health literacy, as conceptualized by Baker (2006), is a multifaceted construct that reflects an individual's capacity to meet the demands and expectations imposed by society and the healthcare system. It encompasses the ability to access, comprehend, and utilize health information to make informed decisions. Low health literacy exacerbates health disparities, impairing the use of preventive services, accurate disease diagnosis, understanding of medical conditions, adherence to treatment protocols, and self-management capabilities. Consequently, individuals with limited health literacy often experience poorer health outcomes and incur higher medical costs (Wolf et al., 2007). To address these challenges, comprehensive research is needed to bridge the gap between individuals' current capacities and the demands of the healthcare system, thereby facilitating the development of accessible health information and educational interventions for diverse populations.

Health Belief Model (HBM)

The Health Belief Model (HBM), first introduced in the 1950s, remains one of the most influential frameworks in health-related research. This model posits that health behaviors are driven by individuals' perceptions of susceptibility to illness, the severity

of health threats, the benefits of preventive actions, and the barriers to adopting such actions (Glanz et al., 2008). Central to the HBM is the notion that individuals are more likely to engage in health-promoting behaviors if they perceive a significant threat to their health and believe that specific actions can mitigate this threat. The model also emphasizes the role of subjective beliefs, expectations, and social contexts in shaping health behaviors. Over time, the HBM has evolved to incorporate interventions that enhance risk perception and encourage proactive health management, making it a valuable tool for addressing contemporary health challenges (Gryboski et al., 2020).

Neuman's Health Theory

This study adopts Neuman's Health Theory as its primary theoretical framework. Neuman's model emphasizes health promotion, maintenance, and the management of stressors as key determinants of well-being (Jukes & Spencer, 2016). According to Neuman, individuals are constantly exposed to environmental stressors that challenge their physiological, psychological, socio-cultural, spiritual, and developmental stability. The model posits that individuals possess flexible lines of defense that help them adapt to stressors, with greater flexibility enhancing resilience and coping capacity. Anxiety, however, is identified as a debilitating factor that undermines individuals' ability to manage stress, thereby impeding recovery and overall health. Interventions based on Neuman's model aim to reduce stress and strengthen individuals' lines of defense, fostering a state of equilibrium and well-being (Hffline, 1990).

Neuman's theory is grounded in the assumption that humans are holistic beings influenced by five interrelated variables: physiological, psychological, socio-cultural, spiritual, and developmental. The physiological variable pertains to the body's structure and function, while the psychological variable focuses on mental processes and their interaction with the environment. The socio-cultural variable examines the impact of social and cultural contexts, and the spiritual variable considers the role of beliefs and values. Finally, the developmental variable addresses age-related processes and activities (Ahmadi & Sadeghi, 2017). This holistic perspective makes Neuman's model particularly suited for examining psychological well-being, as it accounts for the complex interplay of individual and environmental factors.

Literature Review

Recent studies have explored the intersection of e-health literacy and psychological well-being, highlighting the transformative potential of digital health technologies in mental health care. Below, we review key studies that inform the theoretical and empirical foundations of this research.

E-Health Literacy and Mental Health

Zhang et al. (2024) investigated the mediating role of e-health literacy in the relationship between health self-management and mental health among undergraduate nursing students in China. Using a sample of 385 students, the study employed health literacy and mental health questionnaires to assess the variables. The findings revealed a significant positive correlation between e-health literacy and mental health,

underscoring the importance of digital health competencies in promoting psychological well-being.

Digital Mental Health Interventions

Seiferth et al. (2023) developed a guideline for researchers and practitioners on the use of digital technologies in mental health care. Their study employed the Delphi method to evaluate the methodological quality and implementation of e-mental health interventions. The authors identified three key objectives: intervention evaluation, development, and the characterization of study designs. The study concluded that e-health technologies hold significant promise for enhancing mental health outcomes, provided they are implemented with rigorous methodological standards.

E-Health Interventions for Healthcare Workers

Dominguez-Rodriguez et al. (2022) examined the feasibility and effectiveness of e-health psychological interventions for healthcare workers during the COVID-19 pandemic. The study involved 49 participants and focused on reducing anxiety and depression while improving quality of life and self-care practices. The results demonstrated that e-health interventions had a positive impact on psychological well-being, highlighting their potential for addressing mental health challenges in high-stress environments.

Cost-Effectiveness of E-Health Interventions

Massoudi et al. (2019) conducted a systematic review and meta-analysis to evaluate the effectiveness and cost-effectiveness of e-health interventions for depression and anxiety in primary care settings. The review included 14 studies out of 3,617 publications and found that e-health interventions had a modest but significant impact on mental health outcomes. The study emphasized the need for further research to optimize the cost-effectiveness of these interventions.

E-Health Models for Adolescents

Srivastava et al. (2017) proposed an e-health model, "Yuva," designed to address the psychological challenges faced by adolescents aged 10 to 19. The study highlighted the role of digital technologies in enhancing the flexibility and accessibility of mental health services. By integrating e-health solutions with professional expertise, the authors argued that it is possible to address the unique psychological needs of adolescents more effectively.

Gaps in the Literature

While existing studies have predominantly examined mental health and e-health literacy from medical and psychological perspectives, this study distinguishes itself by adopting a sociological lens. By focusing on demographic characteristics and conducting a comparative analysis of youth and adults, this research addresses a critical gap in the literature. The emphasis on social context and population-specific factors enhances the relevance and applicability of the findings, contributing to a more

nuanced understanding of the relationship between e-health literacy and psychological well-being.

Methodology

This study is descriptive and cross-sectional in nature. The statistical population includes all young and adult residents of the 11 districts of Shiraz. The study was conducted over a six-month period from September 20, 2022, to March 20, 2023. Based on the 2016 census, the population of Shiraz is 1,414,167 (Statistical Center of Iran, 2016). The sample size was determined using Cochran's formula with a 96% confidence level and a 4% margin of error, resulting in 599 participants. To ensure greater reliability, 600 participants were selected through stratified random sampling. Inclusion criteria included: 1) Residing in Shiraz, 2) Being between 18 and 30 years old for youth, and 3) Being 40 years or older for adults. Given the socio-cultural differences and varying social roles in Iran (such as marriage age, entry into the job market, and financial independence), the 18-30 age group was considered 'young adults,' as this range generally coincides with transitional life stages (education, family formation, and career initiation). In contrast, those aged 40 and above were defined as 'adults,' who typically experience stability in their professional and family lives. The 18-30 group (digital natives), who are generally tech-savvy, and the 40+ group (digital immigrants) may face distinct challenges in e-health literacy. The 31-39 age group was excluded to avoid analytical bias, as their intermediate characteristics could disrupt comparative results. The reliability of all variables measured on a Likert scale was assessed using Cronbach's alpha. The results, presented in Table 1, indicate that Cronbach's alpha for all measurement tools was above 0.7, confirming their suitability for evaluation.

Table 1. Cronbach's Alpha Values for Study Variables

Study Variables	Cronbach's Alpha
E-Health Literacy	0.949
Psychological Well-being	0.844

Research Tools

1 .Demographic Questionnaire: Participants responded to common demographic variables (age, gender, income, marital status) and questions about information sources. Marital status was categorized as single or married, and information sources were grouped into social networks, national media, and friends/acquaintances.

2 .Lifestyle Questionnaire: The Lifestyle Questionnaire, adapted from Lali et al. (2012) in a study titled "Construction and Evaluation of the Lifestyle Questionnaire," was used to measure psychological well-being. The dimensions were evaluated on a 4-point Likert scale (Never=0, Sometimes=1, Usually=2, Always=3). The score range for this variable was 0 to 21. The psychological well-being variable consisted of 7 items. To measure psychological well-being, a lifestyle questionnaire was used that measures six key components: 1 .Hope for the future (questions such as I am hopeful for the future), 2 .Positive feelings and thoughts, 3 .Self-acceptance, 4 .Enjoyment of challenges, 5 .Feeling of control over life, 6 .Appreciation of beauty and enjoyment of art. All items were scored on a 4-point Likert scale (from 'never' to 'always'). The

reliability of the questionnaire was confirmed with a Cronbach's alpha of 0.844. Cronbach's alpha was used to assess the reliability of the questionnaire, with values above 0.7 indicating internal consistency. The validity of the questionnaire was confirmed by relevant experts.

3 .E-Health Literacy Questionnaire: The E-Health Literacy Questionnaire, adapted from Rasouli et al. (2018) in a study titled "Investigating E-Health Literacy and Its Predictors Among Patients Visiting a Military Hospital in Tehran in 2017," consisted of 8 items evaluated on a 5-point Likert scale (Very Low=1, Low=2, Moderate=3, High=4, Very High=5). The score range for this variable was 1 to 40. Cronbach's alpha was used to assess the reliability of the questionnaire, with values above 0.7 indicating internal consistency. The validity of the questionnaire was confirmed by relevant experts.

Data were analyzed using SPSS version 27. First, the correlation between variables was calculated using Pearson's correlation coefficient. Then, multivariate regression was used to study the relationship between e-health literacy and psychological well-being.

Research Results

The study was conducted on 600 individuals from Shiraz, equally divided into 300 youth (under 30 years old) and 300 adults (over 40 years old) (World Health Organization, 2024). The average age of participants was 36.24 years, with a standard deviation of 15.58 years. Table 2 presents the demographic variables of respondents, categorized by youth and adults. Income was measured by asking participants about their income, which was then categorized. Information sources were divided into social networks, national media, and friends/acquaintances. Social networks were the most commonly used source for health-related information.

Table 2. Descriptive Statistics of Demographic Variables

Variable	Status	Youth	Adults	Total
Gender	Female	50%	50%	50%
	Male	50%	50%	50%
Income (Rial)	<100000000	73.2%	46%	57.1%
	≤100000000<200000000	15.2%	25.7%	21.4%
	≥200000000	11.6%	28.3%	21.4%
Marital Status	Single	83.7%	16.3%	50%
	Married	16.3%	83.7%	50%
Information Sources	Social Networks	87%	88.6%	87.8%
	National Media	12.7%	11%	11.9%
	Friends/Acquaintances	0.3%	0.3%	0.3%

Based on the findings presented in Table 3, the descriptive statistics for the variables of e-health literacy and psychological well-being were calculated, including the mean, standard deviation, minimum, and maximum values.

Table 3. Descriptive Statistics of Study Variables

Variable		Youth	Adults	Total
E-Health Literacy	Mean	27.11	24.93	26.02
	SD	7.05	8.44	7.85
	Min	1	1	1
	Max	40	40	40
Psychological Well-being	Mean	13.16	12.16	12.66
	SD	4.64	7.74	4.72
	Min	0	0	0
	Max	21	21	21

To assess the relationship between the variable of e-health literacy and psychological well-being, Pearson's correlation coefficient (r) was used. The results of this test are summarized in Table 4.

Table 4. Correlation Matrix of Study Variables

Variable	Youth		Adults		Total	
	Correlation Coefficient	P-Value	Correlation Coefficient	P-Value	Correlation Coefficient	P-Value
E-Health Literacy	0.305	0.001	0.257	0.001	0.288	0.001

p<0.01

According to Table 4, the variable of e-health literacy exhibits the strongest correlation with the study's dependent variable, psychological well-being. Changes in the level of e-health literacy are associated with corresponding changes in psychological well-being. E-health literacy shows a significant and proportional correlation with psychological well-being among both youth and adults. In the present study, multiple linear regression analysis was employed to examine the impact of independent variables on psychological well-being. The results, as presented in Table 5, indicate that e-health literacy has a positive and statistically significant relationship with psychological well-being among both youth and adults, as well as in the overall sample. Specifically, an increase in e-health literacy is associated with an improvement in psychological well-being, while a decrease in e-health literacy corresponds to a decline in psychological well-being.

Among the study variables, income showed the weakest relationship with psychological well-being in the youth population, while marital status had the least association in the adult population. Gender, overall, demonstrated the weakest relationship with the dependent variable of psychological well-being.

Table 5. Multivariate Regression Analysis of Psychological Well-being

Variable	Youth				Adults				Total			
	Coefficient B	Coefficient β	Statistic t	P-Value	Coefficient B	Coefficient β	Statistic t	P-Value	Coefficient B	Coefficient β	Statistic t	P-Value
E-Health Literacy	208/0	307/0	86/5/3	00/1/0	19/0	355/0	69/3/4	00/1/0	171/0	295/0	49/1/5	00/1/0
Age	05/0	034/-	41/3/0	68/0	051/0	134/0	84/5/1	06/6/0	006/0	02/0	33/1/0	74/1/0
Gender	123/0-	013/0-	15/3/0	87/8/0	394/0	041/0	62/1/0	53/5/0	187/0	019/0	37/8/0	70/5/0
Income	03/3	146/0	85/4/1	06/6/0	122/1	086/0	33/1	18/5/0	444/1	096/0	94/1/1	05/3/0
Marital Status (Reference: Single)												
Married	637/0-	056/0-	66/6/0	50/6/0	429/0-	037/0-	58/1/0	56/2/0	903/0	094/0-	67/2/1	09/5/0
Information Sources (Reference: Social Networks)												
National Media	229/1	083/2/0	09/1/1	27/7/0	552/0-	037/0-	57/9/0	56/3/0	312/0	021/0	43/4/0	66/5/0
Friends/Acquaintances	415/5	087/0	14/5/1	25/4/0	092/7-	099/0-	56/8/0	11/8/0	265/0	004/0-	08/1/0	93/5/0
Adj.R ² = 082/0 =349/0 <000/0	R ² =122/0 F=084/3 P-Value	R	Adj.R ² =092/0 R ² =118/0 F=397/4 Value <000/0	R =344/0 P-	Adj.R ² =094/0 R ² =11/0 F=934/6 P-Value <000/0	R =332/0 P-						

Discussion

This study aimed to investigate the relationship between e-health literacy and psychological well-being among youth and adults in Shiraz, Iran. The primary objective was to conduct a comparative analysis of the psychological well-being of these two groups. The psychological well-being of youth, as the active segment of society, and adults, as the future of society, is of paramount importance. According to Neuman's Health Theory, the environment is fraught with psychological stressors, and preventing these stressors can significantly contribute to individuals' health. Strengthening psychological well-being is a critical dimension of overall health, as it

equips individuals with the ability to cope with and resolve challenging situations when they arise.

From Neuman's perspective, health represents the highest degree of stability that a system can achieve under specific conditions. In this framework, the role of nurses and healthcare professionals is crucial. Their responsibility is to identify stressors in the environment and develop strategies to mitigate them, thereby helping individuals achieve stability and resilience. Neuman refers to the process of individuals adapting to and confronting environmental stressors as "reconstitution." This process can occur at any stage of stress management and is essential for strengthening individuals' normal lines of defense, as well as aiding in future prevention efforts. The primary goal of nursing in this model is to reduce pressure on individuals and patients (Wang, Huang, & Jin, 2019).

This study focused on two groups in Shiraz: youth aged 18 to 30, who are considered the active and vital segment of society, and adults aged 40 and above, whose psychological well-being is crucial for the community. The findings revealed that the psychological well-being of youth was slightly higher than that of adults, which may be attributed to the greater flexibility of youth in dealing with challenges. Youth are often engaged in education and receive family support, factors that can reduce stress levels and enhance psychological well-being. Additionally, youth in the 18 to 30 age group tend to have more social interactions with peers, which plays a significant role in reducing stress and improving psychological well-being. Therefore, focusing on the psychological well-being of youth is essential for societal growth.

Psychological health was evaluated using a validated questionnaire assessing six dimensions: hope for the future, positive emotions, self-acceptance, enjoyment of challenges, stress control, and appreciation of beauty (total score range: 0-21). The results indicated that while youth showed a slightly higher mean psychological health score (12.16 ± 2.72) compared to adults (12.66 ± 7.74), this difference was not statistically significant ($p > 0.05$) based on an independent samples t-test. Notably, the adult group exhibited substantially greater variability in scores ($SD = 7.74$) than youth ($SD = 2.72$), suggesting more diverse psychological health experiences among adults. At the component level, youth demonstrated significantly higher scores in hope (15.2 ± 3.1) and enjoyment of challenges (13.8 ± 2.9), whereas adults reported better stress control (14.1 ± 4.2). These findings highlight distinct psychological health profiles between the two age groups, with youth showing greater optimism and challenge-seeking tendencies, while adults displayed superior stress management capabilities despite wider score dispersion.

Furthermore, the study found that the average level of e-health literacy among youth was higher than that of adults in Shiraz. This difference may reflect generational disparities, as youth in the 18 to 30 age group have grown up in an era where technology and internet use are integral to society. For youth, accessing health-related information through the internet and social media is a convenient and cost-effective alternative. In contrast, adults may have less familiarity with digital tools and technologies, limiting their ability to utilize these resources for health-related information.

The study also examined information sources and found that social networks were the most commonly used source among both youth and adults. This preference may be

due to the ease of access, low cost, and the ability to openly discuss personal issues. Individuals with higher e-health literacy are better equipped to manage their health, reduce stress and anxiety, and enhance their psychological well-being. According to the theoretical framework used in this study, the impact of environmental stressors varies depending on individual characteristics and their ability to cope. Individuals in society are likened to active systems constantly striving for growth and development (Jukes & Spencer, 2016). Therefore, increasing health literacy can help mitigate the effects of stressors.

The findings of this study indicate a significant positive relationship between e-health literacy and psychological well-being. As e-health literacy increases, so does psychological well-being, while a decrease in e-health literacy leads to reduced resilience in coping with challenges. These findings align with studies by Donker and Kleiboer (2018), who emphasized the importance of e-health innovations for mental health, and Yellowlees et al. (2008), who highlighted the role of e-health in delivering culturally appropriate mental health services. Similarly, Drissi et al. (2021) found a significant relationship between e-health literacy and psychological well-being, consistent with the results of this study. Neuman's perspective on nursing interventions and environmental stressors has been particularly influential in addressing the needs of children and older adults. These stressors, which encompass physiological, psychological, socio-cultural, developmental, and spiritual variables, directly impact individuals and evoke emotional responses (Jukes & Spencer, 2016). E-health literacy is thus a critical factor influencing the psychological well-being of individuals in a society, and its importance cannot be overstated.

Another key finding of this study relates to the relationship between demographic factors and psychological well-being. The study examined variables such as age, gender, income, and marital status. However, no significant relationship was found between these demographic variables and psychological well-being. Changes in income, gender, marital status, and age did not significantly affect psychological well-being. This finding is consistent with studies by Prince et al. (2007) and Keng et al. (2011) but contrasts with studies by Rosenfield and Mouzon (2012), Dhejne et al. (2017), Kiely et al. (2019), and O'Rourke (2009), which found significant relationships between psychological well-being and demographic variables.

In light of the findings and the importance of psychological well-being, it is recommended that the results of this study be disseminated to educational, health, and psychological centers. Given the significant role of e-health literacy and the widespread access to the internet and social networks, more effective measures should be implemented to provide psychological services to individuals. The health of a society's population is a fundamental factor in achieving societal goals, and attention to this aspect is essential.

Future research should explore the relationship between e-health literacy and psychological well-being in other demographic groups, such as women and adolescents. Psychological well-being is a necessity for a developed and healthy society, and enhancing individuals' psychological well-being ensures the overall health of the community.

Conclusion

This study investigated the relationship between e-health literacy and psychological well-being among youth and adults in Shiraz, highlighting the significant positive correlation between the two variables. The findings indicate that higher levels of e-health literacy are associated with improved psychological well-being, while lower levels correspond to reduced resilience in coping with stressors. Youth exhibited slightly higher psychological well-being compared to adults, likely due to their greater flexibility, social support, and familiarity with digital technologies. Social networks emerged as the primary source of health-related information for both groups, underscoring the importance of accessible and cost-effective digital platforms. These results align with Neuman's Health Theory, emphasizing the role of environmental stressors and the need for interventions to strengthen individuals' coping mechanisms. The study underscores the critical role of e-health literacy in promoting psychological well-being and calls for targeted efforts to enhance digital health competencies across all demographic groups. Future research should explore these relationships in other populations, such as women and adolescents, to further advance mental health initiatives in society.

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Conflict of Interests

The authors declare no ethical issues or conflicts of interest in this research.

Ethical Standards

The authors affirm this research did not involve human subjects.

CULTURE OF CORRUPTION AS A KEY ISSUE IN ANTI-CORRUPTION METHODOLOGY AND POLICIES (ON EXAMPLES OF ITALY AND ARMENIA)

Edgar Kalantaryan, <https://orcid.org/0009-0008-1759-8180>

PhD in Political Sciences, Associate Professor

Chair of Public Administration, Faculty of International Relations

Yerevan State University, Armenia

Email: edgar.kalantaryan@ysu.am

Abstract: The aim of this article is to examine the presence of a culture of corruption in public administration systems, assess its negative impact on governance, and evaluate anti-corruption methodologies for enhancing governmental effectiveness. In this context, we explore various manifestations of corruption in public organizations and analyze international experiences - particularly the case of Italy - where we conduct a comprehensive review of its anti-corruption policies and highlight their significance in fostering an effective governance system. The more we know about the causes of corruption, the better we can decide which policy instruments to use to combat corruption. Corruption is a phenomenon that gains public visibility in democratic regimes because in such regimes there are freedom of press, freedom of expression, free party organizations, and opposition to the governments on duty. However, although democracy has the merit of not hiding corruption, not confronting and not containing acts that are harmful to the public interests can be lethal to democracy itself by generating autocratic governments that place themselves above political institutions (Ribeiro, 2000). The study examines the framework and methodologies of anti-corruption policies in the Republic of Armenia, comparing them with the experience of Italy. The theoretical foundation for addressing the issues discussed in this research is based on classical and modern theories of public administration, political science, and sociology. The study employs analytical, comparative, and systemic methods. Italy - being surrounded by European countries, possessing a more institutionalized governance system, and having a more democratic and socially mature society - finds itself in a relatively advantageous position in combating corruption compared to Armenia. Nonetheless, Italy still faces persistent corruption-related challenges. In contrast, Armenia's situation is shaped by its Soviet legacy, the Karabakh (Artsakh) conflict, and the inefficiencies in governance since independence, all of which have contributed to the persistence of a culture of corruption. Despite significant legislative advancements in recent years, systemic inefficiencies remain. Addressing corruption requires time, skilled professionals, strong managerial will, and other critical factors. International experience in managing state institutions plays a crucial role in shaping Armenia's anti-corruption efforts. With the purpose of providing better conditions for the adequate understanding of corruption, this article seeks to systematize some of the main theoretical reflections on the subject, highlighting attempts to conceptualize and classify it, as well as some of the approaches developed with the aim of understanding its causes and devising strategies for its control.



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Introduction

The effectiveness of public administration is directly proportional to the transparency and democratization of governance processes. The scientific literature presents various approaches to improving governance, of which anti-corruption measures are among the most important. Corruption has been identified as one of the main challenges facing modern states. As a result of this process, public distrust of the state has gradually increased and the idea has spread that it is a widespread phenomenon that contaminates the public sector and the political class, and which is inadequately addressed and punished. This distrust is a characteristic feature of modern democracies and stems from the internal dysfunction of the representative system, which is conditioned by the fear of citizens that state agents do not fulfill their obligation to promote the common good. Moreover, corruption, by using state power for private gain, undoubtedly exacerbates this mood. There is consistent empirical evidence that corruption undermines economic development. In this regard, Wei (1998) notes that studies conducted by various authors Studies conclude that the more corrupt a country is, the slower its growth.

In the context of ongoing political, social and economic transformations in a globalized and networked world, the effectiveness of public administration is a key factor in shaping strategic governance, ensuring institutional accountability and modernizing public institutions.

The quality of public administration, its effectiveness, and the right anti-corruption policies directly affect a country's economic performance and the well-being of its citizens. Although efficiency is often associated with private enterprises, it is equally important in the public sector, where the allocation of resources should be consistent with the goal of providing public goods and services. Over time, the involvement of the private sector in the provision of public services has reduced the monopoly of the public sector in this area, stimulating competition and increasing efficiency (Florina, 2017: 316).

Corruption is a deeply rooted phenomenon that affects all levels of government, posing a serious challenge to sustainable economic and social development. It includes activities such as bribery, influence peddling, and embezzlement, and in some cases, legally permitted practices such as lobbying (Roots of Corruption, 2017). Political corruption occurs when officials exploit their positions for personal gain. Historically, corruption has been viewed as a moral and social problem. for example, Socrates was sentenced to death in part for "bribery of the youth" (Encyclopedia Britannica). Recently, corruption has been linked to complex international networks, including financial institutions, that facilitate illegal activities (United States Agency for International Development report, 2022). Corruption not only undermines democratic institutions, but also erodes the moral fabric of society, leading to severe social consequences and reducing the international reputation of the country (Akhmetov, 2018: 118). There is a wide range of theories aimed at studying the factors influencing corruption. These factors can be of different nature and extent. However, it is worth

noting that corruption is a complex, multifaceted and multifactorial phenomenon, and therefore is not determined by a limited set of factors.

Theoretical and Methodological Foundations of the Studies of Corruption

Much attention has been paid in the professional literature to the question of what corruption is. To best understand it, we choose the following definition, which is based on many objective grounds: “the behavior of public officials that deviates from accepted norms in order to serve private ends” (Huntington 1989: 377). When looking at the literature on corruption we notice a difference between studies that put forward propositions about the causes of corruption (in other words, studies that theorize about the causes of corruption) and those that empirically try to establish the causes of corruption. The latter sort of studies is by far outnumbered.

In sociology, corruption is perceived as a pathological societal phenomenon that distorts interpersonal relationships. It functions as an informal regulatory system that coexists with official governance mechanisms, often emerging due to state inefficiency. Corrupt behavior among officials is thus defined as «informal, deviant behavior of the ruling elite, characterized by the illegitimate use of social resources» (Garaev, 2001: 47). From a political science perspective, corruption disrupts the political organization of society. It is closely linked to power struggles and is particularly prevalent during electoral processes. Maurice Duverger observed that political parties frequently use corruption to secure electoral victories, not only for personal enrichment but also to strengthen ties between the political elite and citizens (Duverger, 2000: 201). Hence, combating corruption requires strengthening political institutions, fostering civil society, and raising political awareness.

The conceptualization of corruption from the perspective of social sciences is not straightforward. This is because the term “corruption” can encompass a range of behaviors and practices that, depending on a particular set of values or cultural factors, may or may not be deemed morally or even legally reprehensible. In this sense, as pointed out by Andvig et al. (2000), the complexity of corruption lies in the fact that it has been viewed not only as a structural problem of politics or economics but also as a cultural and individual issue. Given these peculiarities surrounding corruption, numerous authors have sought to establish a more suitable concept for the phenomenon and its complexity. Holmes (2015) suggests that corruption, in its most traditional sense, is associated with moral impurity. However, the author acknowledges that, although the concept of corruption has changed over the centuries and varies according to each culture, it has been used to describe deviations from norms that may be considered improper.

Corruption has been a major issue in China, where the reliance on personal relationships has contributed to widespread unethical practices. Historian Keith Schoppa identified various forms of corruption in China, including bribery, embezzlement, nepotism, smuggling, and real estate fraud (Schoppa, 2020: 383). Addressing the challenges of arriving at a precise concept of corruption, Jain (2001), in a work organizing and systematizing empirical and theoretical studies on the subject, emphasizes that although defining corruption is not trivial, there is almost a consensus in the literature that it refers to acts in which public power is used for personal benefits, contrary to what norms and regulations establish.

Daniel Kaufman introduced the concept of «legal corruption» where those in power manipulate legislation to legalize unethical actions (Kaufmann & Pedro, 2005: 21-23).

The root causes of corruption include:

- Political monopolies and lack of competition.
- Weak democratic institutions and low political transparency.
- Excessive bureaucracy and inefficient administrative structures.
- Restricted press freedom and low economic liberalization.
- Ethnic divisions, group favoritism, and gender inequality.
- Poverty, political instability, and weak property rights.
- Influence from corrupt neighboring countries.
- Low levels of education and civic engagement.
- High unemployment and inadequate anti-corruption policies.

All these concepts, quite similar, focus on corruption from a perspective more oriented towards the actions of the public sector. Unsatisfactory results of corruption procedures can be found in any country of the world. For a long time, humanity has been trying to eliminate corruption; in some cases, it has gained both positive and negative experience. Each state has tried to develop its own effective system of measures that would minimize its negative consequences. The process of overcoming corruption is a function of the state governance system of all countries. There are several models of anti-corruption policy, of which two stand out, within the framework of which it was possible to introduce real anti-corruption potential. The first is the Singaporean or Asian model: it is characterized by strict control over officials and severe punishments. The second is the Swedish or Scandinavian model, when the main efforts are focused on the possibility of corruption itself. This is achieved through the elimination of restrictions in the economy, maximum publicity in state affairs and high ethical standards set for officials (Semenov, 2009: 4).

To effectively combat corruption, it is necessary to create an independent body that will be responsible for implementing anti-corruption policy (for example, the Singapore Corruption Investigation Bureau, which has political and functional independence). The next important factor is the remuneration of civil servants. High salaries do not guarantee that corruption will not occur, but they can significantly reduce the motivation to pay bribes. It is also necessary to introduce programs into the public administration system that will reduce direct contact between officials and citizens. It allowed citizens to monitor the progress of their applications to government officials via the Internet at any time of the day and from any place. This will make it possible to prevent unnecessary bureaucratic delays and biased discussions of ordinary applicants' cases, giving people the right to follow the entire process online (for example, the successful "OPEN" program to prevent corruption in South Korea) (Nelezenko, 2013: 58-71). As for the punishment, as in Finland, for example, serving a sentence for bribery seems strange from a national perspective. The maximum is four years in prison, but most cases end with a fine. Here, in addition to the fine, the official is subject to condemnation by citizens, against which the imprisonment may seem like a milder punishment (Aleksanyan and Aleksanyan 2024: 109-112; Semenov, 2009: 4). The examples of these countries are also important for understanding what methods may be most acceptable, depending on the cultural and national characteristics of the country.

Regarding the literature on corruption, Filgueiras (2008) highlights that, in the 20th century, studies on the subject can be defined based on two main agendas: first, developed from the 1950s onwards, from a functionalist perspective, which views corruption as an obstacle to modernization; and second, hegemonic in the social sciences from the 1990s onwards, based on rational choice theory, which suggests that corruption is related to rent-seeking behavior, where the individual preferences of political agents weigh more heavily as they seek to maximize their private income, within or outside the rules of conduct. The first of these currents, based on the so-called "modernization theory," relates corruption to underdevelopment. It argues that the phenomenon represents the malfunctioning of political system organizations, responsible for creating incentive systems that may lead to deviation. According to this approach, corruption would be an accepted practice in underdeveloped societies, given the low level of political institutionalization (Huntington, as cited in Filgueiras, 2009). The author further emphasizes that, for the functionalist current, corruption could even be useful for development since, if kept under control, it could be an alternative to promote modernization, as it could streamline bureaucracy, expedite the issuance of licenses and documents by the State, and improve the relationship between the public and private sectors, establishing an informal bond between bureaucrats and private investors.

Serra (2006) included in his analysis the relationships of corruption with five sociocultural variables, such as religion and ethnic-linguistic fragmentation, and identified that different religions have different effects on corruption and that there are indications, as identified by Treisman (2000), that Protestant countries are less corrupt. This new way of understanding what determines corruption has led to a fresh reflection on the strategies that should be used to reduce its incidence. Previously, as already observed, corruption was often perceived as a problem more closely related to values, traditions, and culture. It is now seen as a rational phenomenon, in which the agent weighs the cost, represented, for example, by the possibility of sanction, against the economic benefits.

Based on these definitions and typologies, the following sections will present approaches that will define anti-corruption mechanisms that will help reduce corruption risks. In this context, the study of the Italian example is quite interesting, despite the numerous problems it faces. The Republic of Armenia has made considerable progress in recent years in the context of the fight against corruption. The study of different models, and especially the Italian example, is quite interesting and useful, where the application of the above-mentioned models is necessary to achieve results.

Comparative Analysis: Italy and Armenia

Controlling corruption is not trivial. As corruption is a multifaceted and multicausal problem, strategies to reduce its incidence must address a series of dimensions. It is, therefore, a complex problem that consequently requires complex solutions. For this reason, it is not uncommon to encounter a series of dilemmas related to combating corruption. Anekiarico and Jacobs (1996) point out that another consequence of fighting corruption may be that governments become less effective and efficient, as many anti-corruption controls tend to reinforce bureaucratic pathologies. This is in keeping with the need to create anti-corruption systems. Corruption and crime are

global issues, though their prevalence varies by country. Data suggests corruption is on the rise worldwide. Governments allocate resources to control corruption, often under the umbrella of anti-corruption strategies (The Grand Challenge: Effective Anti-Corruption Measures in Projects, 2022). In the public administration system, anti-corruption efforts involve a range of policies, procedures, and oversight mechanisms. The most common tool is **monitoring**, carried out by law enforcement agencies such as the Ministry of Internal Affairs, State Security, the Prosecutor's Office, and Customs. Civil society and international organizations also play a vital role in ensuring transparency and accountability (Arzumanyan, 2018: 41).

Despite the establishment of a legal framework in Armenia, significant gaps remain, necessitating further reforms. The success of anti-corruption measures depends on legal mechanisms, institutional integrity, and a systematic approach to governance (Kumukov, 2019: 27; Khazanov, 2019: 65).

By comparing Italy and Armenia's anti-corruption efforts, we can identify best practices and tailor them to Armenia's specific needs. A comprehensive, well-structured approach will be essential in overcoming the entrenched culture of corruption. For example, the application of the Swedish and Singaporean models can be considered a useful experience for both Armenia and Italy, given their positive impact. An in-depth study and simultaneous application of these two models will serve as a basis for preventing corruption.

Anticorruption methodology in Italy

In the fight against corruption in Europe, the example of Italy is noteworthy. The fight against fascism in Italy, as well as in other European countries, initiated radical changes in domestic political structures, which became a guarantee for the transition from dictatorship to democracy. The first quarter of the post-war period was of great importance in the history of Italy: the old totalitarian structures were abolished, laying the foundation for the formation of more democratic institutions of state governance. The new Italy was born in the midst of a sharp struggle between the old and the new. In this context, structures were created in Italy to ensure the effectiveness of state governance, which over the years underwent numerous reforms, becoming the basis for the establishment of more democratic governance (Kalantaryan, 2022: 74-75).

The study of corruption risk management mechanisms in Italy is very interesting, because unlike other ancient European states, Italy has a fairly high level of corruption. Italy is one of the most corrupt countries in Western Europe and in 2024 ranked 52st in the world. In general, it can be noted that the Italian model of anti-corruption policy formation and implementation is considered to be partially effective. In fact, despite the fact that the 1990s in Italy were marked by an intensification of the fight against corruption in the state sector, it is still difficult to give an objective assessment of the situation there (The problems of corrupt governance in Italy, 2025).

The history of corruption in Italy, as well as the fight against it, can be divided into three stages: The first stage covers the period of the existence of the Roman state. Rome went through several periods of development: the royal period, the republican period, and the imperial period. Until the end of the Roman Republic (until the 2nd century BC), corruption as a phenomenon did not exist in Italy. The officials of that time did not embezzle state property, they were engaged in charity and built and

maintained it with their own means. It is important to understand that the absence of embezzlement of state property and other corruption crimes is explained not so much by the high moral qualities of officials or the presence of legal mechanisms aimed at combating corruption, but by the socio-economic relations that took place during that period, where the responsibility and other moral qualities of officials also played a certain role. The situation began to change dramatically in the 2nd century BC. This is due to the fact that during this period the Roman state began to possess enormous wealth, which was acquired during the wars of conquest. The growth of wealth affected the entire Roman society, as well as the civil servants who were part of this society. The changes, first of all, took place in the moral system of society, which was expressed in the transformation of attitudes towards corruption. Naturally, in response to the emergence of corruption phenomena, measures began to appear aimed at counteracting them. Such measures include «the prohibition of senators from simultaneously engaging in maritime trade, financial transactions and state contracts» (Mommsen, 2001: 422). However, these measures were extremely ineffective, as senators easily circumvented this prohibition through the use of proxies. In addition, legislative acts on wealth were adopted, the essence of which was to introduce a stricter tax regime for those things that were classified as «wealth» by law (Kuzovkov, 2010: 27).

A sharp increase in corruption crimes was observed especially in medieval Italy. It should be noted that the greatest increase in crimes of this nature occurred precisely during the period when Italy was part of the Eastern Roman Empire, that is, starting from 555. In the Middle Ages, monetary relations began to develop rapidly in the Eastern Roman Empire (Byzantium), the size of the state apparatus increased, and the branches of state power began to merge, which contradicted the principles of Roman law. The massive involvement of all strata of the population, including the nobility and clergy, in entrepreneurial activity led to changes not only in the social structure of society, which was reflected in the growth of the middle classes and political influence of the population, among which were wealthy merchants and artisans, but also in legal consciousness. And it was during this period that a fundamentally new understanding of corruption emerged as an antisocial phenomenon that permeates society as the basis for any deviation from the law (Gagen, 2009: 25). The consequence of this was that without judicial reforms it was impossible to overcome corruption, since the courts played the main role in this matter. For this purpose, three judicial reforms of the Palaeologus were implemented, which were of significant importance (1296, 1329, 1398) (Gagen, 2008: 47).

The next stage refers to a new period: at this time, corruption in Italy acquired a highly organized character: the state apparatus merged with organized crime, which led to the widespread penetration of corruption phenomena, including in the most important sectors of the country's economy. It should be noted that «the growth of organized mafia crime in Italy was characterized by a high level of criminal professionalism, a strictly hierarchical structure and a distribution of roles» (Berkov, 2012: 102). In other words, corruption essentially became high professionalism. Corruption in Italy is largely based on a system of relationships determined by the active participation of organized crime. Several mafioso groups operate in Italy, the Sicilian “Cosa Nostra”, the Neapolitan “Camorran”, the Calabrian “Ndrangheta”, the Apulian “Accra Corona Unita”, etc., all of which are influential unofficial subjects of

public life. The mafia was able to achieve such a large influence due to a number of factors, including the weakness of the state, a certain skepticism of the population towards the law, and the elimination of the traditional value system and the development of capitalism. The mafia actually filled the gaps that arose during modernization and performed some of the functions of the state. As a result, by the end of the 19th century, the mafia was quite closely connected with the state, at first at the regional level, and after the Second World War at the national level (Lobin, 2006: 111-127).

Corruption and the dependence of public officials on criminal structures became so widespread that in 1992 the Italian government was forced to launch a special operation aimed at combating this social and legal phenomenon, called «Clean Hands». The initiator of this operation was the Milan prosecutor Antonio Di Pietro, who in 1992 arrested a member of the Italian Socialist Party for taking a bribe (Berkov, 2012: 102-104). In the early 1990s, a fairly close cooperation had been established between the economic and political spheres. Large organizations felt protected because they had close relations with the government and politicians, as well as the opportunity to influence decisions and protect their own interests. Political parties also felt protected, as they had constant financial, «moral» and power support from big business, which ensured the stability of the political system. Thus, a symbiotic situation was established in Italy, based on the illegitimate principle of relations between business and politics. In addition, the paternalistic type of state operating in Italy was distinguished by the latter's intensive participation in the country's economic activities. It not only directed the development of the economy, but also demonstrated a fairly high level of economic activity and was engaged in the redistribution of resources between commercial organizations, regions and individuals. The state, playing an active role in the economy, often rescued «friendly» organizations in case of financial difficulties. As a result, instead of improving the industry, the leaders of the organizations were wasting their efforts and resources on establishing unofficial relations with the political forces in power. This created a favorable environment for the development of corruption.

Let us give examples of a dream that received a great response at the time, where several high-ranking officials were exposed and convicted: in particular: «In early July 1994, a trial began in Milan, which became known as the «Trial of the First Republic» because of the large number of high-ranking politicians who were brought to justice. Thirty-two politicians were indicted, including party leaders and former ministers.» As a result of the operation, a large number of judges and politicians were convicted of corruption crimes, including even former prime ministers and former foreign ministers. 1,456 businessmen were also charged with other corruption-related crimes (Savchenko, 2015: 169). The development of corruption was also facilitated by the fact that during the years of the First Republic (1948-1994), even the application of democratic processes could not overturn the majority of the Italian political structures, since no political party could obtain a majority in parliament. This led to the need to form political coalitions and share political bonuses with other political parties. This also gives grounds to assume that during this period, political parties in Italy were not under the ideological influence, but rather under the influence of businessmen and politicians.

Despite the fact that the majority of the country's political forces were not inclined to actively fight corruption, the Italian government, under the pressure of certain circumstances, was forced to accept its negative consequences for society. Since the

1980s, efforts have been made to counter mafia groups and prevent their entry into state structures. It was a rather expensive initiative, both in terms of financial and human resources. The losses on both sides were significant. Already in the mid-1990s, thanks to the implementation of various measures, which, as mentioned above, was called the “Clean Hands” operation, numerous mafiosi of various ranks were sent to prison. In response, prosecutors and public figures were killed by mafia groups, with whose participation an attempt was made to prevent corruption risks. The result of all this was the loss of citizens’ trust in political parties and politicians. The political structure of the First Republic could not withstand the long-term scandal and collapsed.

Already at the end of the 1990s, as a result of Constitutional reforms, significant positive changes were recorded: the Electoral Code was changed, state control was increased, the amount of state investments increased, etc. In some cases, the changes were simply astonishing, for example, the cost of one kilometer of metro construction became 57 percent cheaper, and the construction of a new international airport cost 59 percent less than planned, etc (Barbagli, 2003: 109-133). Italy has made significant progress in the fight against corruption, reforming its legislation, establishing oversight bodies and actively cooperating with international organizations, in particular GRECO. Membership of GRECO allows Italy to compare its anti-corruption strategies with the experience of other European countries and receive recommendations for improvement. The organization has paid particular attention to the problems of transparency in the Italian judicial system and the mechanisms for controlling the financing of political parties (EU cooperation with the Group of States against Corruption (GRECO): how to move towards full membership, 2021). The next important factor was the tightening of laws. For example, the anti-corruption law adopted in 2012 provides for stricter penalties for corruption, as well as obliges officials to declare their income and assets (The anti-corruption law in Italy, 2012). The National Anti-Corruption Authority (ANAC) plays a major role in anti-corruption efforts, overseeing transparency in state institutions. It also deals with the prevention of corruption risks in order to identify possible violations in the state system (The Italian National Anti-corruption Authority, 2012).

In Italian society, corruption was considered a common phenomenon for many years, and was approached with a kind of acquiescence by the elites and the middle classes. In particular, political parties often took advantage of this situation to gain support through corrupt deals instead of votes. Since the state often failed to combat corruption, society used this system in various ways, from finding a way to communicate with civil servants through official channels to corrupt deals. Thus, the presence of corruption was perceived as something “normal” in society, and some people even accepted it as something that had to be put up with in order to overcome the difficulties and problems that arose in everyday life (Jonathan, 2016: 88).

All this has hindered the modernization and development of the Italian public administration system, the result of which has been that major reforms have been implemented in recent years: restrictions on officials, that is, some public officials are prohibited from engaging in business during their term of office. Next, property confiscation, that is, income and property obtained as a result of corrupt transactions are subject to confiscation. Next, trials in short terms, this means that within the framework of reforms of the judicial system it is planned to speed up the examination of corruption cases, reducing delays in trials, etc.

Corruption risks, and anti-corruption methodology of Armenia

In countries in transition, including the Republic of Armenia, the presence of corruption risks is even more evident in the public administration system. Especially in post-Soviet countries, where there was a totalitarian form of government, after independence, overcoming corruption in these countries is progressing very slowly and not very effectively.

The fight against corruption in the Republic of Armenia has been carried out at the level of policies and strategies since 2001. In general, the Republic of Armenia has had four anti-corruption strategies with corresponding action plans, all of which have to some extent envisaged the completion and improvement of the anti-corruption institutional system, as well as the creation of new bodies: council, commission, committee, court, etc. The creation of the Anti-Corruption Committee can be considered one of the important results of the so-called Velvet Revolution that took place in Armenia in 2018 (Atanesyan, 2018). The provisions on the Anti-Corruption Committee, as well as other bodies of the anti-corruption institutional system: the Anti-Corruption Policy Council, the Corruption Prevention Commission, the Department of Supervision over the Investigation of Corruption Crimes of the Prosecutor General's Office of the Republic of Armenia, and the Specialized Anti-Corruption Court are enshrined in the Anti-Corruption Strategy of the Republic of Armenia for 2019-2022 (The Anti-Corruption Strategy of the Republic of Armenia, 2019-21).

According to Transparency International's 2013 Corruption Perceptions Index, Armenia ranks 94th out of 175 countries. According to civil society organizations, corruption is widespread in Armenia. The existence of corruption is also acknowledged by officials, but no serious steps are being taken to eliminate it (Corruption risk assessment in Armenian defense agencies, 2013). These and similar studies indicate that in almost all areas of public administration in the Republic of Armenia, despite some positive changes since independence, there are still many shortcomings in terms of overcoming corruption. For years, anti-corruption efforts in the Republic of Armenia have attempted to target the manifestations of corruption rather than the underlying causes of their occurrence. However, in the absence of effective management of corruption risks in the governance sector, a negative attitude is formed in the public perception and in relation to the services provided by the state, and an inadequate understanding of the results of individual works carried out. Corruption risk is equated with institutional vulnerability within the system or process, which can contribute to the development of corrupt practices. Corruption risk management is an essential and integral part of any corruption prevention strategy and integrity policy, enabling public and private sector organizations to identify weaknesses at management, structural, control and other levels that may contribute to corruption. It provides a risk-based framework that helps the organization develop corruption risk mitigation action plans that effectively minimize the organization's exposure to corruption risks. The need to introduce a corruption risk management system in public and private sector bodies is justified both by developments at the national, domestic level, and by international commitments undertaken by the Republic of Armenia («On amendments to the law «on the commission for the prevention of corruption», «on amendments to the law «on local self-government», 2019).

The process of establishing an anti-corruption system in the Republic of Armenia faces a number of fundamental challenges, which relate to the formation of the institutional structure, the uncertainty of legal regulations, as well as the need to ensure the independence of structures. Back at the beginning of the last decade, the RA government completed the anti-corruption policy, legislative and institutional frameworks. The motivation to strengthen public intolerance towards corruption, to have a country secured by the rule of law and guarantees of human rights protection, requires a firmly formulated will and determination to declare the fight against corruption as a priority. All of this became even more important in Armenia, especially with the change of government in 2018, where the newly formed government developed a new strategy for revealing corruption scandals.

As a result of the above-mentioned imperatives, on October 3, 2019, (anti-corruption strategy of the Republic of Armenia and its implementation program, 2019-2022) the Government of the Republic of Armenia approved the Anti-Corruption Strategy of the Republic of Armenia and the Action Plan for its Implementation for 2019-2022, the main goal of which was the consistent implementation of the conceptual assumptions and principles proclaimed by the Government of the Republic of Armenia in the field of combating corruption. Remaining committed to the implementation of the above-mentioned goals, the Government of the Republic of Armenia, within the framework of its 2021-2026 activity program, is determined to wage an uncompromising fight against corruption with the involvement of all stakeholders in order to finally eradicate all manifestations of corruption (Anti-Corruption Strategy of the Republic of Armenia, 2023-2026).

Already in this new situation, in November 2019, the Commission for the Prevention of Corruption was established as a specialized autonomous body for the prevention of corruption with appropriate guarantees of independence. As a result of the legislative amendments adopted in 2019-2022, the scope of competences and tools of this body have been significantly expanded, which is certainly a very positive development. In particular, as a result of the expansion of its powers, the Corruption Prevention Commission has been granted the authority to conduct integrity investigations in cases provided for by law, to verify the current financial activities of political parties, as well as annual property reports, to verify and analyze declarations submitted by members of political parties' governing bodies, and to analyze declarations within the framework of investigations into the confiscation of illegally acquired property. As a result of the expansion of its tools, the Corruption Prevention Commission has been granted legislative access to state databases, as well as financial information, including banking information, information on securities transactions, information constituting insurance secrecy, and credit information (The fight against corruption in the Republic of Armenia, 2019-22).

In October 2021, the Anti-Corruption Committee was established as an investigative body specialized in corruption crimes proceedings and with guarantees of independence, which organizes and conducts pre-trial criminal proceedings on corruption crimes. This committee was provided with a separate premises, independent budgetary financing, and the necessary tools to carry out its functions. This body carries out its activities based on the principle of independence, maintaining its political neutrality, transparency, and accountability to the public (Law of the RA on

the anti-corruption committee, 2021). The establishment of the committee is important, but the creation of the committee and the creation of a functional basis alone are not yet sufficient to make progress in the system. Evaluating these measures helps to understand how successful anti-corruption reforms have been, as well as what problems and challenges still exist that require attention and new solutions. It should be noted that as a result of the legislative changes made, some successes have been recorded, in particular:

- definition of virtue,
- introduction of morality verification mechanisms,
- situational declaration contribution (2024),
- launch of the electronic declaration system (2023),
- anti-corruption strategy implementation (2019-2022),
- expansion of the declaration system,
- legislative reforms (Law on property and income declaration of leading employees of government bodies of the Republic of Armenia, 2001).

The above-mentioned reforms aim to reduce the level of corruption, increase the transparency of state bodies and strengthen public trust. As a result, the performance of the 2019-2022 anti-corruption strategy was assessed at 80.2%: new anti-corruption structures have been created, integrity verification mechanisms have been introduced and the declaration system has been expanded. However, there are still challenges that require continuous reforms and oversight. For the effectiveness of anti-corruption policy, it is necessary to outline a clear vision of the institutional model for its implementation. The situation that developed after the so-called Velvet Revolution 2018 showed that the Armenian government is ready to fight corruption and achieve significant results. However, political will alone is not enough: it is necessary to ensure a systematic and institutional approach, as well as the maturity of society. The success of the fight against corruption largely depends on the existence of a stable and effective institutional system. To this end, it is necessary to ensure the independence of prevention and detection bodies, create effective mechanisms, and strengthen cooperation. It is necessary to continuously reform the legislative framework, simplify processes, and ensure the full independence and effectiveness of relevant structures. Only with a systematic approach and continuous demonstration of political will it be possible to form a stable and effective anti-corruption institutional system.

To increase the effectiveness of the fight against corruption, it is necessary not only to improve legal regulations, but also to expand the functions of the Corruption Prevention Commission. As a result of legislative amendments, new functions should be included in the scope of the commission's activities, which will contribute to the effective implementation of anti-corruption policy, strengthening public oversight, and ensuring transparency in public administration. Improving monitoring and control mechanisms, raising public awareness and fully implementing the country's anti-corruption policy are important conditions for the success of the country's fight against corruption. These changes will contribute to the effectiveness of state governance, increasing trust and reducing corruption risks, which in turn will ensure a stable and fair legal environment, contributing to democratic governance.

All these legislative changes are certainly important, but in Armenian society there is still a perception of corruption (as in Italy) that it is considered "normal" and some people even rebel against the use of anti-corruption norms.

The result of the legislative reforms was that some high-ranking officials (including the president) were convicted of abuse of office and corrupt practices. All this, of course, raised certain hopes in society for the anti-corruption policy of the country's leadership, but over time these hopes showed a certain tendency to decline, not due to the weakness of the legislative framework, but more due to the inconsistency and incompetence of the government. In this context, it is important to develop and implement a comprehensive strategy, which should not be a formality to please donors or the electorate, but rather create an effective framework for solving the identified problems. Our country is still far from being like Italy in terms of recording final positive results, this has both objective and subjective grounds, but thanks to political will and consistent work, we can very soon achieve the expected development prospects.

It should be noted that the institutional changes implemented in the Republic of Armenia to improve anti-corruption policy indicate a systematic and consistent approach to the fight against corruption. However, effectiveness depends not only on institutional reforms, but also on their practical implementation, strengthening of control mechanisms, and the maturity and involvement of society. The success of the fight against corruption depends on continuous political will, proper allocation of resources, and a consistent approach to anti-corruption measures.

Conclusion

Corruption is a global phenomenon that affects modern democracies. Therefore, an analysis of its determinants is essential for its proper understanding. While corruption is a rather complex phenomenon, there is strong evidence that it is linked to factors of an individual, cultural and institutional nature. It is therefore important that such factors are widely taken into account in the development of strategies to prevent and combat it, improve its control, and thus reduce its prevalence.

Considering the culture of corruption as a key issue in anti-corruption methodology, we came to the conclusion that, by undermining public trust in public institutions, corruption hinders the development of any country. It is particularly harmful to the development of countries in the developing world, depriving them of such important capital. Resources obtained through corruption are often diverted to domestic and political influence, thereby weakening democratic institutions and further spreading corruption in this vicious circle. Corruption is an obstacle to development, undermines the security of modern societies and reduces trust in public institutions. Governments have at their disposal a wide range of tools to reduce corruption: strengthening good governance, improving transparency and accountability, etc.

In this context, analyzing the examples of anti-corruption governance mechanisms in Italy and Armenia, it became clear that despite the different levels of corruption prevalence, both countries face similar challenges related to combating corruption schemes, increasing transparency in public administration, and strengthening the role of civil society. The Italian experience shows that the combination of a strong law enforcement system, an independent judiciary, and public oversight can provide significant anti-corruption results. For Armenia, it is important not only to implement legislative reforms, but also to implement them in practice, ensure transparency in the administrative system, and create an anti-corruption culture. To this end, it is necessary

to continuously develop anti-corruption institutions, strengthen public oversight, and apply successful international experience. The effectiveness of the fight against corruption also depends on raising public awareness, strengthening the accountability of state bodies, and introducing new technologies. The development of e-governance, digital accountability, and transparent transaction mechanisms can significantly reduce corruption risks and promote the efficiency of public administration. In addition, it is necessary to activate international cooperation and apply the experience of global anti-corruption structures (for example, Italy is not only a member of GRECO, but also actively cooperates with organizations such as the European Union and the United Nations to participate in global initiatives to combat corruption). In this context, not only national legislative reforms are important for Armenia, but also the introduction of mechanisms in line with international standards. The fight against corruption should be a continuous and systematic process that includes all layers of society, law enforcement agencies, independent organizations and the media.

The examples of the two countries showed that the fight against corruption is conditioned by historical, political, socio-economic and cultural factors. Italy, having a long history, has over time formed strict anti-corruption management measures. The «Clean Hands» operation was an important stage in the fight against corruption, as a result of which many high-ranking officials and businessmen were brought to justice, and a multi-layered anti-corruption system operates there. The fight against corruption in Armenia is just developing, and a number of reforms have been implemented in recent years, including the formation of anti-corruption bodies and legislative reforms. However, in our case, anti-corruption policy is still in the process of formation, which does not have the strengthened mechanisms typical of Italy. Steps aimed at increasing transparency are making progress, but in practice, systemic problems are still observed, such as issues of judicial independence, corruption risks in the business environment, and accountability gaps within the state apparatus.

Italy recognizes the role of education in the fight against corruption. Public awareness campaigns are being conducted in this direction, especially among young people, so that the future generation realizes the importance of honest and responsible behavior.

Taking all this into account:

- Armenia should strengthen the role of independent anti-corruption bodies, ensuring their full operational independence from political interference,
- should strengthen the integrity of the law enforcement and judicial system, including increasing the impartiality of judges and prosecutors and reducing political influence,
- should toughen the punishment for corruption crimes, including the introduction of property confiscation mechanisms,
- should promote public oversight and participation, as well as the development of citizen engagement mechanisms and the expansion of the role of civil society,
- should establish a decent salary for public officials, reducing the incentives for bribery, etc.

In general, we must emphasize that the effectiveness of anti-corruption governance depends not only on legal regulations, but also on the active participation of society in the process, the accountability of state bodies, and the political will to fight corruption.

Only a consistent and long-term strategic approach will ensure real and sustainable changes, reducing corruption and strengthening democratic institutions. Our conclusion is that, in addition to the abuse of economic and discretionary power, which are the main causes of corruption, the low probability of sanctions may also contribute to the growth of corruption. Therefore, this variable is closely related to the mechanisms of control and punishment of potential perpetrators. The system of sanctions, combined with the presence of institutional controls, are factors that can reduce the prevalence of the phenomenon. The legal apparatus divides the state into branches that not only regulate the behavior of bureaucrats to prevent personal interests from trumping the public interest, but also control the degree of discretion in their actions. The concept of accountability is fundamental to the exercise of democracy, as it establishes that governments should be scrutinized to ensure that there are no deviations in the management of public affairs. Thus, transparent procedures, good audit strategies, and clear rules on ethical behavior, among other aspects, will play an important role in reducing the frequency of the phenomenon

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Conflict of Interests

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Ethical Standards

The author affirms this research did not involve human subjects.

BEING SECURITY CONSCIOUS: ANALYSING SOCIAL MEDIA SECURITY-ORIENTED MESSAGES IN CREATING SECURITY ALERTNESS IN IMO STATE, NIGERIA

Etumnu Emeka Williams

Doctoral candidate, Department of Mass Communication, Imo State University, Owerri, Nigeria. Email: etumnuemeka@gmail.com

Nwosu Laurtta

Doctoral candidate, Department of Mass Communication, Imo State University, Owerri, Nigeria. Email: laurettachinenye16@gmail.com

Jumbo Cynthia

PhD, Research Fellow, Department of Mass Communication, Imo State University, Owerri, Nigeria. Email: cynthiajumbon@gmail.com

Clinton Chukwuma Ogu

PhD, Lecturer, Department of Mass Communication, Rhema University, Aba, Nigeria
Email: clintwisworth@gmail.com

Chukwudumebi Kelechi Amadi

MSc, Research Fellow, Department of Mass Communication, Imo State University, Owerri, Nigeria. Email: amadichukwudumebi@gmail.com

Abstract: This study investigated the role of social media in creating security alertness in Imo State, Nigeria. The research design for this study was a mixed-methods approach employing survey and content analysis. The data indicated that both Imo State Blog and Imo State New Media Facebook pages featured security-related information but with variable rates. Imo State Blog had 11 security-related postings within one year, whereas Imo State New Media published merely 7 posts over the same period. Also, findings suggested that the majority of people had frequent exposure to security-related posts on social media platforms and were aware of security alertness messages sent through these platforms. It was concluded that social media plays an essential role as a medium for enhancing security alertness and encouraging community safety behaviours within the region.

Keywords: *Social media, Security alertness, Social media platform, Awareness.*



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Introduction

Social media is a fundamental aspect of modern communication, altering the way information is shared and consumed. The widespread presence of technology in modern life has significantly changed the digital environment, leading to a fundamental change in how people engage with material and communicate with one another (Etumnu & Williams-Etumnu, 2023). Kaplan and Haenlein (2010) define social media as internet-based platforms that facilitate the production and sharing of material created by users. This concept emphasises the interactive aspect of social media, where users are not only passive recipients but active participants in online conversation.

Social media platforms enhance the digital experience by providing a wide range of opportunities for interaction. Social media platforms such as Facebook, Twitter, and Instagram cater to a wide range of interests and objectives. Facebook and Twitter permit relationships across continents, while Instagram allows tales to be shared through photographs and videos (Jumbo et al., 2023; Kaplan & Haenlein, 2010). Additionally, networks such as LinkedIn cater to the professional environment, giving a venue for networking, career promotion, and information exchange among professionals across sectors. The diverse range of platforms exemplifies the complex and varied ways in which people engage and express themselves, promoting the formation of communities, discussions, and partnerships in online environments.

Furthermore, social media surpasses geographical limitations, making communication more accessible to people from all parts of the world and magnifying the voices of individuals from different backgrounds. Through social media, users may engage in discourse, exchange ideas, and mobilize for causes on a global scale, generating a feeling of connection and collective action (Kaplan & Haenlein, 2010). Social media acts as a catalyst for societal change and empowerment by raising awareness about social concerns, organising grassroots movements, and facilitating the sharing of cultural expressions. As such, its effect reverberates well beyond the field of digital communication, infiltrating numerous elements of contemporary life and defining the trajectory of human connection in the digital age.

The relevance of social media surpasses its function in personal networking, as it has grown into a formidable force impacting public conversation on different societal concerns, including security-related matters (Obayi et al., 2024).. In Imo State, like in many locations internationally, the convergence between social media and security concerns is obvious (Macaulay et al., 2021). The advent of social media platforms has offered users with unprecedented channels to express their views, share information, and join in conversations on topics of security. Consequently, the digital world in Imo State has become a thriving arena where security-related subjects are extensively discussed, argued, and distributed among inhabitants (Macaulay et al., 2021).

The proliferation of security-related posts on social media platforms underlines the need for an in-depth research into their nature, impact, and usefulness in establishing community safety practices. From notifications concerning criminal activity to conversations on methods for strengthening public safety, social media acts as a medium for information distribution and collective involvement in security discourse. Understanding the dynamics of security-related discourse on social media within the context of Imo State is crucial for stakeholders, including government agencies, law enforcement entities, and community organizations, to create informed solutions. By

collecting insights into the patterns, topics, and attitudes expressed in security-related postings, stakeholders may modify their methods to harness social media as a tool for boosting security awareness and strengthening public safety activities.

Furthermore, the shifting nature of social media dynamics needs a sophisticated understanding of its implications for security administration in Imo State. As social media continues to grow, so do the techniques adopted by diverse players to leverage these platforms for distributing information, influencing public opinion, and forming narratives on security concerns. Therefore, understanding the interplay between social media dynamics and security discourse in Imo State is vital for modifying governance frameworks, policies, and interventions to effectively handle growing problems and possibilities in the digital age.

Statement of the Problem

Despite the increased popularity of social media in conversations around security problems in Imo State, there remains a paucity of empirical study analysing the frequency, nature, and effect of security-related posts on social media platforms within the area. Moreover, the attitudes, understanding, and perceptions of citizens regarding security-related information conveyed through social media platforms remain little studied.

Consequently, there is a compelling need for a systematic inquiry to address these gaps in information and give insights that may drive the creation of successful strategies for harnessing social media in raising security awareness and strengthening community safety practices in Imo State. How successful is security-related posts on social media platforms in enhancing security vigilance among inhabitants of Imo state?

Objectives of the research

The objectives of the study were to:

1. Assess the frequency of security-related postings emerging on social media platforms in Imo State.
2. Analyse the nature of security posts propagated through social media platforms in Imo State.
3. Analyse the knowledge of citizens of Imo state regarding security vigilance messages conveyed through social media platforms.
4. Examine the attitudes of citizens regarding security-related information acquired via social media.
5. Investigate the perspective of residents towards the usefulness of social media platforms as tools for improving security vigilance and cultivating community safety practices in Imo State.

Conceptual Review

Definition and Examples of Social Media

Kaplan and Haenlein's (2010) definition of social media is one that is frequently used. According to Kaplan and Haenlein (2010), social media is a group of web-based applications that enable the creation and sharing of user-generated content and expand upon the conceptual and technological foundations of Web 2.0. Social media has

played a key role in transforming the internet from a platform primarily focused on information transmission or broadcasting to one where the majority of users create their own content, whether it be short videos on YouTube or Facebook status updates, or share content created by others on sites like Digg (Beer 2008; Thelwell, 2009).

Web 2.0 claims that social media are platforms for social interaction that use publishing techniques that are very accessible and scalable. This term includes new media platforms, but it also implies the existence of Facebook and other platforms that are typically associated with social networking. Social media can take many different forms, such as social networks, weblogs, internet forums, and social blogs. The categories of social media, which include social networks, content-sharing websites, content-ranking systems, and geolocation technologies, may be very broad (Kaplan & Haenlein, 2010). They emphasized that people's online social connections are usually based on their offline social connections.

Facebook, Twitter, LinkedIn, and MySpace are a few examples. They claim that content-sharing platforms allow users to access, review, and debate content created by professionals and amateurs alike. These consist of Flickr and YouTube. People use the third kind of tools, known as content-sharing tools, to direct other network users to content that they believe is particularly important. It includes websites that create individual profiles, such as Digg.

Effective Use of Social Media for Awareness Creation

Strategies must be developed in order to use social media in campaigns effectively. According to Kietzman et al. (2011), there are five ways to use social media in a campaign. They are: Choose your battles wisely; balance is key; messaging is important; engagement is crucial; and consistency is important. The loss of privacy is one of the main concerns about social media. If you are not careful, your profile details, photo, status updates (brief messages to all of your friends), and comments (your responses to other people's status updates) may reveal too much about you, claims Awake! (Feb, 2012)." Additionally, other information, such as your phone number, date of birth, or email address, may expose you to identity theft, harassment, or bullying. Certain individuals are using social media platforms, including websites, short messaging services, and multi-media services, that transmit altered images, to spread fear, provoke violence, and inspire rebellion, endangering the security of the country.

Social Media, Security and National Defence

At the Open Government and Innovations Conference in Washington, Rutrell (2009) quoted panelists who said, "Social networking tools must be a core part of national defence, harnessing the power of communities of interest to collaborate and share knowledge to address a range of issues from analyzing intelligence data to post-war recovery initiatives." Panelists acknowledged that social media software is used by activists, businesses, governments, and even terrorists and criminals worldwide, and that it cannot be ignored. (Rutrell, 2009).

Review of empirical studies

According to Ogedebe and Babatunde (2012), who wrote about the role of information technology in addressing security issues in Nigeria, security agencies should use well-known social networking sites to disseminate news and community security tactics in order to reach members of the populace who are continuously online and actively producing and disseminating content on their own time. Rüdiger and Mario (2014) conducted a non-representative study on how German police officers use social media for work-related goals. The results showed that perceptions regarding the practical use of social media for policing and prevention purposes differed significantly from those regarding its usefulness for individual police officers and police organizations in general. They suggested that an e-learning course be established in order for the police to be recognized as an open, transparent, and community-focused dialogue partner in digital space. They also suggested gathering empirical data regarding population expectations and how citizens envision a police presence on social media, as well as whether or not it is desired and acceptable.

Kudsk (2012) conducted a survey on the potential benefits of social media use for NRENs. The results demonstrated that social media fosters relationships, encourages dialogue, makes it easier and faster for experts to respond to questions, and provides valuable contacts. It is also used for information sharing and feedback gathering, event, service, and product promotion, stakeholder engagement, user support, news event reporting, internal consultation, and information sharing with coworkers. They discovered that people are more interested in short, pertinent information than lengthy reports and social media allowed them to reach people they never knew were interested in them. They recommended that NREN use social media more for their operations.

Lexis Nexis Risk Solution researched the impact of social media on law enforcement in criminal investigations in 2012. The survey method was used. According to the poll, the police use a variety of social media sites to support their investigations. Conceptual Structure The social marketing theory was used in the study. One could consider this theory to be a continuation of the dissemination and persuasion theories. It has a well-defined strategy for raising audience awareness of the campaign's topic; it closely considers audience segmentation and targeting; it develops reinforcement techniques as a crucial part of the information design; it places significance on the development of images and impressions; and, beyond raising individual awareness, it moves on to pique interest, which should result in information-seeking about the campaign's topic.

Methodology

The research design for this study was a mixed-methods approach employing survey and content analysis. The survey population of the research consisted inhabitants of Imo State, projected to be roughly 6,743,545 based on a geometric population projection formula with a growth rate of 2.5%. The sample size for the quantitative survey component was estimated using a confidence level of 95% and a 5% error level, resulting in a sample size of 385 respondents. The sampling approaches adopted included multi-stage sampling, simple random sampling, and purposive selection to guarantee appropriate representation and variety within the research sample.

Data were obtained by physical copies given in chosen regions within Owerri, Orlu, and Okigwe. The study instrument adopted for data collection was a questionnaire designed to gather both demographic information and psychographic data relevant to residents' awareness, beliefs, and behaviours surrounding security communication on social media. To verify the validity of the research instrument, specialists in the field of communication assessed the questionnaire, offering input to ensure alignment with the study goals. Reliability assessment of the questionnaire was undertaken utilising the test-retest technique, resulting in a Cronbach Alpha coefficient of 0.84, indicating excellent reliability.

Method of data analysis comprised mean analysis for demographic and psychographic data received from the survey. In parallel, content analysis was undertaken on postings from two Facebook sites exclusively connected to Imo State. A systematic strategy was adopted to gather postings over a predetermined period, and a coding scheme was devised to characterise the nature and content of security-related posts. Quantitative analysis includes determining frequencies and percentages of different post categories.

Data Presentation and Analysis

Table 1: Frequency of security alertness post on social media

Type of Post	Imo State Blog	Imo State New Media
Image	6 (54.6%)	3 (42.86%)
Text	3 (27.3%)	2 (28.57%)
Video	2 (18.2%)	2 (28.57%)
<i>Total</i>	<i>11 (100%)</i>	<i>7 (100%)</i>

Source: Fieldwork, 2024

Table 1 shows the frequency of security-related posts on Imo State Blog and Imo State New Media Facebook pages. The chart demonstrates that Imo State Blog had 11 articles relating to security during one year, but Imo State New Media, a government-orientated Facebook page had merely 7 posts. Posts with images dominate the content shared on both pages, comprising approximately 54.6% on the "Imo State Blog" and 42.86% on "Imo State New Media." Following posts with images, text-only posts are the second most common format, with "Imo State Blog" featuring 27.3% and "Imo State New Media" 28.57%. Video postings, while less common than text and picture posts, nonetheless contribute considerably, with "Imo State Blog" at 18.2% and "Imo State New Media" at 28.57%. In as much as the frequency of coverage of security concerns seems to be quite low, it is vital to remember that both platforms efficiently employ numerous content types to effectively disseminate security-related information on social media platforms.

Table 2: Nature of security postson social media

Types	Imo State Blog	Imo State New Media
Crime Alerts	3 (27.27%)	2 (28.57%)
Safety Tips	4 (36.36%)	2 (28.57%)
News Reports	4 (36.36%)	3 (42.86%)
<i>Total</i>	<i>11 (100%)</i>	<i>7 (100%)</i>

Tone of the Post	Imo State Blog	Imo State New Media
Informative	5 (45.45%)	4 (57.14%)
Alarming	3 (27.27%)	2 (28.57%)
Reassuring	3 (27.27%)	1 (14.29%)
<i>Total</i>	<i>11 (100%)</i>	<i>7 (100%)</i>
Source of the Post	Imo State Blog	Imo State New Media
Official Authority	4 (36.36%)	2 (28.57%)
News Outlet	4 (36.36%)	3 (42.86%)
Citizen Report	3 (27.27%)	2 (28.57%)
<i>Total</i>	<i>11 (100%)</i>	<i>7 (100%)</i>
Topic of the Post	Imo State Blog	Imo State New Media
Theft	3 (27.27%)	2 (28.57%)
Vandalism	2 (18.18%)	1 (14.29%)
Community Events	6 (54.55%)	4 (57.14%)
<i>Total</i>	<i>11 (100%)</i>	<i>7 (100%)</i>

Source: Fieldwork, 2024

Table 2 shows the type of security posts on social media sites. The table reveals that safety tips and news reports constitute significant portions of the posts shared on both platforms, comprising approximately 36.36% each on “Imo State Blog” and 28.57% safety tips and 42.86% news reports on “Imo State New Media.” These percentages underscore the platforms’ emphasis on providing informative and current security-related information to their audiences.

Furthermore, the study emphasises disparities in the tone of security articles, with “Imo State Blog” giving a more balanced approach between warning and reassuring tones. Informative messages dominate both channels, with around 45.45% on “Imo State Blog” and 57.14% on “Imo State New Media,” while worrying tones are significantly lower at 27.27% and 28.57%, respectively. These percentages represent the platforms’ attempts to transmit information in a manner that informs and engages residents while also addressing any issues or risks.

Additionally, the source of security installations has a key impact in moulding citizens’ opinions and behaviours. Both official authorities and news outlets are important sources on both platforms, with “Imo State Blog” including 36.36% official authority posts and 36.36% news outlet posts, and “Imo State New Media” consisting 28.57% official authority posts and 42.86% news outlet posts. Approximately 54.55% of postings on “Imo State Blog” and 57.14% on “Imo State New Media” focus on community activities, emphasising the platforms’ attempts to increase community involvement and participation in security programmes. Meanwhile, theft-related postings represent 27.27% on “Imo State Blog” and 28.57% on “Imo State New Media,” demonstrating a need for heightened awareness and preventative actions against criminal activities in the community.

Table 3: Awareness of residents of Imo State regarding security alertness messages disseminated through social media platforms

Questions	Response	Frequency	Percentage
<i>How often do you come across security-related posts on social media?</i>			
	Very frequently	123	32.3%
	Frequently	98	25.7%
	Occasionally	79	20.7%
	Rarely	54	14.2%
	Never	27	7.1%
	Total	381	100%
<i>Are you aware of security alertness messages disseminated through social media platforms in Imo State?</i>			
	Yes	297	78.0%
	No	84	22.0%
	Total	381	100%
<i>How do you usually access security-related information on social media?</i>			
	Through official pages/accounts	154	40.4%
	Through news sources	87	22.8%
	Through community groups/pages	71	18.6%
	Through personal connections/contacts	43	11.3%
	Other (please specify)	26	6.8%
	Total	381	100%

Source: Fieldwork, 2024

Table 3 demonstrates that the majority of respondents (32.3%) reported coming across security-related postings on social media very frequently, followed by frequently (25.7%) and rarely (20.7%). A lower share reported seldom (14.2%) or never (7.1%) encountering such messages. This shows a considerable degree of exposure to security-related material on social media platforms among inhabitants. Also, the majority of respondents (78.0%) stated being aware of security vigilance messages sent through social media platforms in Imo State, while a minority (22.0%) claimed not being aware. This high degree of knowledge suggests the potential usefulness of social media platforms in reaching citizens with security-related information. The chart demonstrates that the most popular method respondents get security-related material on social media is through official pages/accounts (40.4%), followed by news sources (22.8%) and community groups/pages (18.6%). This shows that government channels and news sources play key roles in distributing security-related information on social media platforms.

Table 4: Attitudes of residents towards security-related information received via social media

<i>Do you consider security-related information shared on social media platforms to be credible?</i>			
	Yes, very credible	127	33.3%
	Somewhat credible	146	38.3%
	Not very credible	61	16.0%
	Not credible at all	47	12.4%
	Total	381	100%

<i>How do you feel when you come across security-related posts on social media?</i>			
Reassured	118	31.0%	
Concerned	147	38.6%	
Indifferent	69	18.1%	
Other (please specify)	47	12.4%	
Total	381	100%	

Source: Fieldwork, 2024

Table 4 reveals that a high majority of respondents stated viewing security-related information provided on social media platforms to be reliable, with 33.3% finding it extremely credible and 38.3% finding it somewhat credible. However, a considerable majority (28.4%) voiced varied degrees of cynicism, with 16.0% believing it not very believable and 12.4% not credible at all. While a considerable minority reported feeling frightened (38.6%) when coming across security-related posts, others reported feeling relieved (31.0%) or indifferent (18.1%). Additionally, several respondents offered other stated emotions (12.4%), showing a varied spectrum of reactions.

Table 5: Perception of residents towards the effectiveness of social media platforms in promoting security alertness in Imo State

<i>To what extent do you think that social media messages been effective in raising more security alert?</i>			
Very high extent	73	19.2%	
High extent	102	26.8%	
Neutral	85	22.3%	
Low extent	64	16.8%	
Very low extent	57	15.0%	
Total	381	100%	
<i>Do you believe that social media platforms contribute positively to promoting security awareness in Imo State?</i>			
Strongly agree	112	29.4%	
Agree	136	35.7%	
Neutral	72	18.9%	
Disagree	41	10.8%	
Strongly disagree	20	5.2%	
Total	381	100%	
<i>Have you ever taken any action based on security-related information you encountered on social media?</i>			
Yes, frequently	126	33.1%	
Yes, occasionally	140	36.8%	
No, rarely	59	15.5%	
No, never	56	14.7%	
Total	381	100%	

Source: Fieldwork, 2024

Table 5 reveals that respondents saw varied levels of efficiency in social media messaging in making them more security attentive. While 19.2% indicated high or very high (26.8%) levels of efficacy, others reported neutral (22.3%), low (16.8%), or very low (15.0%) levels of effectiveness. The majority of respondents indicated good

thoughts regarding the impact of social media platforms to boosting security awareness in Imo State, with 29.4% strongly agreeing and 35.7% agreeing. However, a considerable number voiced indifferent (18.9%), disagreeing (10.8%), or strongly disagreeing (5.2%) opinions. While a considerable number reported acting, either regularly (33.1%) or occasionally (36.8%), others reported seldom (15.5%) or never (14.7%) taking any action based on such information. Responses to the question reveal various levels of involvement with security-related material on social media.

Discussion of Findings

The frequency of security-related posts on social media platforms in Imo State was analysed using Table 1. The data indicated that both Imo State Blog and Imo State New Media Facebook pages featured security-related information but with variable rates. Imo State Blog had 11 security-related postings within one year, whereas Imo State New Media published merely 7 posts over the same period. Notably, postings with photos were the most common format on both platforms, followed by text and video posts. This conclusion agrees with earlier research revealing the prominence of visual material, such as photographs and videos, in social media posts due to their greater engagement rates and efficacy in delivering information (Huang et al., 2016; Kaplan & Haenlein, 2010). However, the comparatively low frequency of security-related posts on both platforms highlights a possible gap in harnessing social media for spreading security information efficiently.

Table 2 gave insights into the features and themes of security postings on social media sites. The data revealed that safety recommendations and news updates were important themes on both Imo State Blog and Imo State New Media, underlining the platforms' commitment on delivering useful and current security-related information to their users. Additionally, the tone of the messages varied, with a mix between informational, scary, and soothing tones. This conclusion corresponds with prior work highlighting the significance of offering useful and varied information to engage social media users successfully (Chadwick, 2017; Tandoc et al., 2018). However, the dominance of community activities as a topic of posts shows a possible need for diversification to cover other security-related concerns, such as theft and vandalism, more completely.

The knowledge of citizens about security vigilance messages on social media platforms was studied in Table 3. The findings suggested that the majority of people had frequent exposure to security-related posts on social media platforms and were aware of security alertness messages sent through these platforms. Moreover, official pages/accounts and news sources were the key ways via which citizens got security-related information. These findings reflect earlier studies demonstrating the impact of social media in promoting awareness and spreading information to a large audience (Nienstedt & Flint, 2017; Stieglitz & Dang-Xuan, 2013). However, the presence of a minority who were not aware of security vigilance messages implies a need for focused efforts to reach all sectors of the community efficiently.

Table 4 gave insights into the opinions of citizens regarding security-related information obtained via social media. The research found that a considerable number of residents deemed security-related information provided on social media sites to be genuine. However, there were various emotional responses to security-related

messages, with some people feeling anxious while others felt relieved or disinterested. These findings are consistent with past research suggesting that social media users view content differently based on many characteristics, including legitimacy and emotional responses (Flanagin & Metzger, 2013; Sundar et al., 2008). However, the prevalence of scepticism towards the legitimacy of information shows a need for methods to promote transparency and trustworthiness in sharing security-related information on social media.

The perspective of inhabitants regarding the efficiency of social media platforms in enhancing security preparedness was studied in Table 5. The statistics demonstrated various levels of efficiency ascribed to social media messaging in enhancing security vigilance among locals. While a considerable majority agreed that social media sites help favourably to improve security awareness, there were also neutral and dissident opinions. These findings correlate with recent studies showing the potential of social media to boost security awareness and community participation (Ghannam, 2011; Trottier, 2012). However, the prevalence of differing perspectives underlines the significance of tackling difficulties such as disinformation and digital divides to optimise the usefulness of social media platforms in increasing security preparedness.

Conclusion

In conclusion, this study has offered an in-depth study of the connection between social media discussion and security-related issues in Imo State. By evaluating the frequency, nature, and effect of security-related posts on various social media platforms, as well as exploring the attitudes and opinions of people towards the content, useful insights have been acquired. The findings show the essential role that social media plays as a medium for enhancing security alertness and encouraging community safety behaviours within the region. Through the broadcast of timely information and the encouragement of public conversation, social media platforms serve as crucial conduits for boosting awareness about security issues and distributing preventive actions to citizens.

Furthermore, the study suggests opportunities for improvement in harnessing social media to boost security results in Imo State. Strategies to assure the authenticity and dependability of security-related material, stimulate community involvement, and increase coordination between law enforcement agencies and social media players emerge as essential goals. Moving ahead, continual review and refining of social media interventions will be crucial to adapt to emerging security concerns and harness the full potential of these platforms in securing communities and promoting public safety.

Recommendations

This study recommends that:

1. Government alone cannot solve the security issue that is why they should collaborate with security agencies and stakeholders. The stakeholders should be invited at government security meetings where ideas on how security issues can be tackled will be shared among themselves with top security experts before communicating or educating the people through any viable communication platforms about security threats and measures to take to stay safe within their immediate environment and beyond.

2. The government and security agencies should work closely with fact-checking organization at all times as this will help in verifying and moderating security-related contents on social media. Why they need to do this, is because social media is free space where anyone can post anything that can cause security tension. So by working closely with this fact-checking organisation the government and security agencies will be vigilant and a step ahead in monitoring the social media platforms against security threat messages.

3. Several community organisations and law enforcement agencies should use their social media platforms as a forum for public discussion about security threats or concerns and in turn these security experts should use same forum to share experts' safety tips. With this, people will be arm with the best security and safety tips at all time in order to stay alert and safe

4. There should be an organised sensitisation by the government and security stakeholders of the people on the need to maintain positive attitude towards security messages especially the ones coming from credible sources as this will help them stay updated on security measures that need to be taken to enable them stay safe especially in time of security emergencies.

5. Government, security agencies should sponsor researches on social media and security as this will give detail insight on how social media can be used to address security concerns. Also, there is need for government and other security stakeholders to collaborate with social media owners so as to evaluate security discourse on social media, using data analytics to gain insights into emerging trends and public perceptions as it concerns security and safety.

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Conflict of Interests

The authors declare no ethical issues or conflicts of interest in this research.

Ethical Standards

The authors affirm this research did not involve human subjects.

CONFLICT-DRIVEN MOBILIZATION IN PROTRACTED CONFLICT: A MULTI-LEVEL CONCEPTUAL SYNTHESIS FROM THE KARABAKH CASE

Hayk Smbatyan <https://orcid.org/0000-0002-6435-2967>

Ph.D. candidate, Chair of Theory and History of Sociology, Faculty of Sociology,
Yerevan State University, Armenia, Master of Social Sciences, “Peace and Conflict
Studies” program, Uppsala University, Sweden

Email: hayksmbatyan@ysu.am

Abstract: This synthesis article examines conflict-driven mobilization in the protracted Nagorno-Karabakh conflict by integrating findings from five distinct papers. Framed by a multi-level analytical perspective, the paper investigates how micro-level emotional and moral motivations, meso-level group identity and collective dynamics, and macro-level structural inequalities and historical legacies converge to drive conflict-driven mobilization. Drawing upon a qualitative research design that combines document analysis, process tracing, semi-structured interviews, and participatory methodologies, the synthesis addresses the central question: How do interdependent emotional, collective, and structural factors fuel mobilization in protracted conflicts? Looking into evidence from the historical evolution of civic movements to their transformation into armed struggles, the paper reveals that mobilization is not solely a rational, calculated act but is deeply rooted in personal and collective grievances. Furthermore, the integration of participatory approaches underscores the value of context-sensitive research in capturing the lived experiences of conflict-affected communities. Ultimately, the proposed multi-level theory advances existing conceptual frameworks in the sociology of conflict mobilization and offers a heuristic tool for understanding similar dynamics in other protracted conflict zones.

Keywords: *sociology of conflict, theoretical synthesis, intractable conflict, conflict-driven mobilization, collective action, Nagorno-Karabakh.*

Introduction

In societies marked by protracted conflict, the persistence and transformation of collective mobilization remains one of the most pressing yet insufficiently understood phenomena in the social sciences. Why do people continue to mobilize, often voluntarily and at great personal risk, amid long-standing conflict, instability, and uncertain political futures? What drives participation in waves of civic activism or military engagement when previous efforts may have failed to yield resolution, and when cycles of violence and disappointment are deeply internalized? These questions become especially salient in cases where conflict becomes an enduring social



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condition, structuring identities, grievances, and forms of agency over decades. The Nagorno-Karabakh (NK) conflict, a territorial and ethnopolitical dispute that has spanned more than three decades and multiple phases of violence, offers a compelling empirical setting in which to interrogate these questions.

While the NK conflict has been analyzed from theoretical (e.g., Arutyunyan, 2006; Saghatelyan, 2012), historical (e.g., Cornell, 1999; De Waal, 2013), sociopsychological (e.g., Vartikyan, 2017; Atanesyan, 2024), and geopolitical (e.g., Uzer, 2012; Poghosyan, 2022) perspectives, this synthesis article takes a distinctly sociological approach by focusing on conflict-driven mobilization, that is, the collective and structural processes of action by which people become engaged in action in the context of sustained and unresolved conflict. Drawing on five original studies presented as part of my doctoral research, I develop a multi-level conceptualization of mobilization in protracted conflict settings. These studies span a range of themes, from individual emotional and moral motivations to group-level solidarities and macro-structural conditions of inequality, and are empirically grounded in the trajectory of the Karabakh conflict, including the First War (1988–1991), the Four-Day War (2016), and the Second War (2020).

Despite the rich literature on collective action and political mobilization (e.g., Olson, 1965; Gurr, 1970; Snow, Soule, & Kriesi, 2004), much of the scholarship continues to rely on either rationalist assumptions (emphasizing cost-benefit calculations, resource mobilization, or elite manipulation) or one-dimensional grievance models. These approaches often fail to account for the complexity of protracted conflict environments, where mobilization is shaped by layered histories of trauma, deeply felt moral obligations, evolving group identities, and structural inequalities that persist across generations. Moreover, in conflict contexts where the line between civilian and combatant is blurred, and where state and non-state actors are often co-constitutive, traditional models of political mobilization prove insufficient (Kalyvas, 2006).

In response to these limitations, this article proposes a sociological synthesis that brings together micro-level motivations (emotional, moral, experiential), meso-level group dynamics (solidarity, collective identity, informal networks), and macro-level structures (ethnic hierarchies, socio-political exclusion, historical inequalities). I argue that only by analyzing the interplay between these levels can we sufficiently grasp the dynamics of conflict-driven mobilization, not as episodic or isolated events, but as embedded, evolving, and often routinized social processes. In the Karabakh case, this is evident in the transformation of mobilization from grassroots civic resistance in the late Soviet period to organized volunteerism in wartime (Smbatyan, 2025), and in the persistent social legitimacy of participation in the defense of “the cause.”

This article is structured as a synthesis of five academic publications. Each article brings about a distinct perspective: one explores the evolution of civic to military mobilization (*ibid.*); another analyzes the role of horizontal inequalities in generating grievances (Smbatyan, 2022); two examine the emotional, moral, and subjective experiences of war volunteers during short-timed (Smbatyan, 2018) and long-running (Smbatyan, 2021) phases of violence outburst; and one reflects on participatory and context-sensitive methodologies for researching conflict (Smbatyan, 2020). Taken

together, they offer a layered understanding of how individuals and groups become mobilized in and by long-term conflict.

The goal of this article is to synthesize and integrate the findings into a coherent theoretical proposition as of which conflict-driven mobilization in protracted conflict must be understood through a multi-level sociological framework that captures its emotional, relational, and structural dimensions. The proposed synthesis offers a conceptual contribution to the fields of sociology, conflict studies, and political mobilization, while also holding practical relevance for policy actors and practitioners seeking to engage with communities affected by enduring conflict.

By placing the NK conflict in broader theoretical dialogue, this article invites further comparative research on conflict-driven mobilization across other “no war, no peace” societies such as those in Bosnia (e.g., Glenny, 2000; Bieber, 2006) or Kashmir (e.g., Duschinski, 2009; Constantin & Carlà, 2024). In doing so, it aims to move the study of collective action beyond short-term events or elite strategies and toward an understanding of how conflict shapes and is shaped by societal structures of participation, identity, and grievance over time.

Overview of Articles

This paper draws upon five interconnected articles that, taken together, construct a layered sociological analysis of conflict-driven mobilization in the context of the NK conflict. Each article builds upon the others to contribute to a broader analytical puzzle. The research spans different phases and forms of mobilization, from civic movements to armed volunteerism, and explores the subjective meaning making, structural conditions, and epistemological challenges of researching protracted conflict from within.

The first article, “*Nagorno-Karabakh Conflict Through the Prism of Horizontal Inequalities: Theoretical Overview*” (Smbatyan, 2022), lays the theoretical foundations of the study. This article constructs an analytical framework centered on the theory of horizontal inequality, arguing that group-level disparities are pivotal in shaping collective grievances. By critically examining both macro-structural factors and micro-level perceptions, the study bridges the gap between objective measures of inequality and the subjective experiences of conflict-affected communities. It emphasizes that the initial civic mobilization in the NK context must be understood not solely as an isolated political uprising, but as part of a broader pattern where perceived injustice and historical marginalization create fertile ground for mobilization. Such meso-level analysis is instrumental in calling for the reorientation of conflict studies toward a more nuanced understanding that transcends traditional macro or micro explanatory models.

In “*From Civic Mobilization to Armed Struggle: Tracing the Roots of the Karabakh Movement*” (Smbatyan, 2025), the historical evolution of mobilization is discussed. This article methodically retraces the transition from a grassroots civic movement, which emerged in the late 1980s, to the more militarized forms of collective action that characterized the early phases of the NK conflict. Through a process tracing approach that combines qualitative interviews and extensive secondary evidence, the study shows how perceived horizontal inequalities (Cederman, Gleditsch, & Buhaug, 2013) between ethnic Armenians and Azerbaijanis catalyzed mass mobilization. In doing so, it highlights how everyday grievances, driven by economic, political, and socio-

cultural disparities, laid the groundwork for a sustained movement. The article's emphasis on the interplay between local narratives and structural conditions establishes a historical baseline for understanding the evolution of mobilization from peaceful civic protest to armed struggle.

The empirical exploration of individual agency and emotional motivations is advanced in “*Civilian Participation in Interstate War: Unfolding Voluntary Collective Action in Nagorno-Karabakh War*” (Smbatyan, 2021). This article delves into why civilians voluntarily join armed conflict during the 2020 escalation. Drawing on in-depth interviews with war volunteers, the study applies Elisabeth Wood’s (2003) theory of insurgent collective action alongside Max Weber’s (1978) social action theory. It demonstrates that emotional and moral motives, rather than purely rational calculations, are at the heart of volunteer decisions. By unpacking the nuanced interplay between affect and agency, this work adds a key dimension to this paper’s framework: it shows that personal and emotional commitments are not merely ancillary to political mobilization but are central drivers that both reflect and reinforce collective identity and purpose.

Complementing the focus on individual and group-level dynamics, “*Sociological Interpretation of Nagorno-Karabakh Voluntary Movement in the Context of the Four-Day War*” (Smbatyan, 2018) further explores the sociological meaning making of volunteerism during conflict. This article extends the analysis of volunteer motivations by examining how these actors construct their identities and relate to the broader social fabric during the Four-Day War. It employs the sociology of war (Malešević, 2010) and social action theory (Weber, 1978) to reveal that the voluntary movement is instilled by symbolic representations of heroism, sacrifice, and national unity. The article illustrates how volunteers internalize and reproduce dominant narratives of valor and self-sacrifice, which, in turn, contribute to the institutionalization of mobilization practices within the conflict milieu.

Finally, “*Challenging the Reality-Conception Split in Conflict Studies: Participatory Methodologies Under Focus*” (Smbatyan, 2020) provides an important methodological contrast. This work critically examines the epistemological divide (Schön, 1995) between academic and practical knowledge production in conflict studies. It advocates for reflective and participatory research methodologies for the studies of protracted conflicts that integrate the lived experiences of conflict-affected populations with rigorous scientific inquiry. By challenging traditional modes of conflict analysis, the article underscores the importance of reflexivity and inclusivity in understanding the multifaceted nature of mobilization. It demonstrates that methodological innovation is not simply a tool for data collection but is central to constructing a more authentic and context-sensitive analytical framework.

Together, these five articles create a dynamic analytical framework that accounts for structure, agency, affect, and methodology. Each article addresses a different dimension of collective action within conflict settings, remaining at the same time connected to the broader goal of understanding how long-term conflict reshapes societies, politics, and the very conditions under which people act collectively.

Thematic Integration

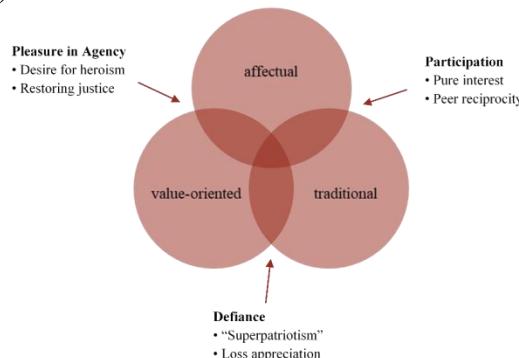
In this synthesis, the multi-level analysis of conflict-driven mobilization in the NK context is structured around three analytical dimensions: **micro-level** emotional and moral motivations, **meso-level** group identity and collective dynamics, and **macro-level** structural inequalities and historical legacies. Each dimension draws upon insights from the five articles to reveal how individual, collective, and structural factors interlace to drive mobilization.

Micro-Level: Emotional and Moral Motivations

At the micro-level, the individual's emotions, moral commitments, and personal experiences play a critical role in the decision to engage in conflict. This dimension is most vividly explored in “*Civilian Participation in Interstate War: Unfolding Voluntary Collective Action in Nagorno-Karabakh War*” (Smbatyan, 2021) and “*Sociological Interpretation of Nagorno-Karabakh Voluntary Movement in the Context of the Four-Day War*” (Smbatyan, 2018). In both of these articles, in-depth interviews with volunteers reveal that decisions to participate in armed conflict are not solely based on rational calculations of benefits and costs. Instead, emotional imperatives, such as a sense of duty, patriotism, and a deep-rooted moral obligation emerge as fundamental motivators. Volunteers describe their commitment in terms that echo personal sacrifice and heroic ideals, suggesting that the experience of conflict generates a moral narrative in which individual heroism is interwoven with collective destiny, leading to being “*considered as different*” and having “*a bigger role, a bigger respect*” (Smbatyan, 2021, p. 66).

These findings essentially challenge conventional merely rationalist frameworks by emphasizing that emotional and moral factors can override more utilitarian considerations. Volunteers often articulate their actions in the language of self-sacrifice and honor, suggesting that their involvement is as much about preserving a shared moral order as it is about achieving specific political objectives (see Figure 1). This in itself illuminates the affective dimensions of mobilization, providing a micro-level perspective that is essential for understanding the personal stakes of participation in protracted conflict.

Figure 1. Reasons for volunteering and Weber's typology of social action (extracted from Smbatyan, 2021, p. 67)



Meso-Level: Group Identity and Collective Dynamics

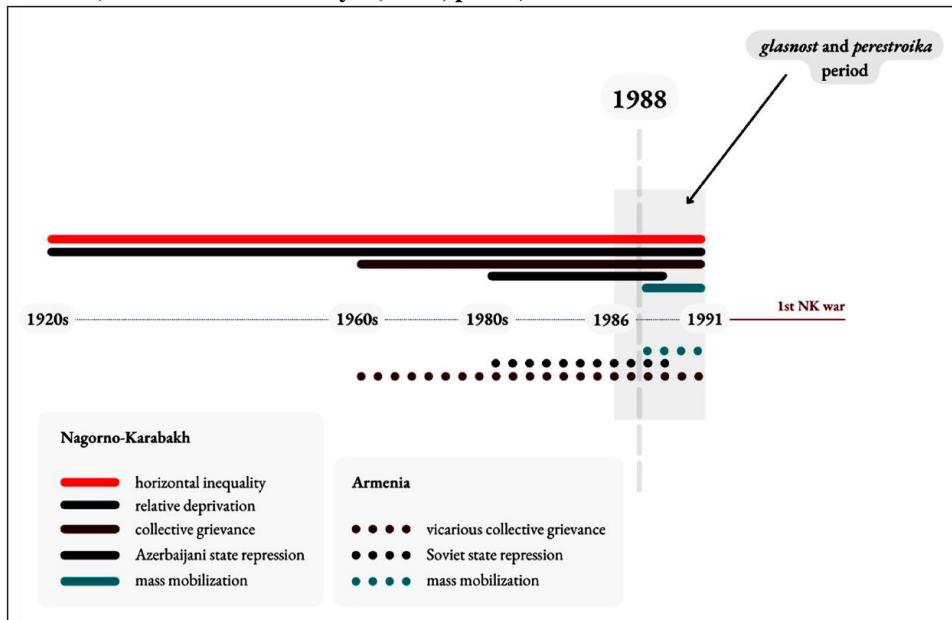
Moving to the meso-level, the current synthesis examines how group identity and collective dynamics shape the mobilization process. “*From Civic Mobilization to Armed Struggle: Tracing the Roots of the Karabakh Movement*” (Smbatyan, 2025) and “*Civilian Participation in Interstate War: Unfolding Voluntary Collective Action in Nagorno-Karabakh War*” (Smbatyan, 2021) underscore that collective action is not merely an aggregation of individual decisions but a coordinated process embedded within social groups. It is noteworthy that the historical evolution from civic mobilization to armed conflict is presented as a narrative of collective identity formation, where shared grievances, cultural memories, and inter-ethnic ties catalyze a transformation in how citizens perceive themselves and their role in the conflict.

At this level, group dynamics are seen in the way ordinary citizens unite around the idea of self-determination and defense of a common heritage. The meso-level analysis highlights that these group processes are crucial in amplifying the emotional and moral motivations identified at the micro-level. In this sense, Abrahamian’s (1990; 1993) anthropological analysis characterizes mass mobilizations as a form of ‘archaic festival’ saturated with ritualistic elements. He highlights the collective experience of unity, shared purpose, and emerging ethnic self-awareness among participants, “*It had a united spirit, a common thought and finally a common sense of ethnic selfconsciousness. According to the statements of many participants, they had a wonderful feeling of being present everywhere, in every place occupied by that huge body of people*” (Abrahamian, 1993, p. 101). When community narratives converge on themes of injustice and historical grievance around horizontal inequalities between ethnic groups, they give rise to a collective consciousness that legitimizes mobilization, “*and everything at all times is connected to that. It’s like a big concert which the whole country participates in, and you cannot be uninvolved in that, and the deeper you dig, the more you want to personally experience what is going on*” (Smbatyan, 2021, p. 65). Such narratives are often reinforced through everyday interactions, local media, and even informal networks, all of which help to solidify a shared sense of purpose. This contributes to a more nuanced understanding of how group identities are both constructed and mobilized during conflict.

Macro-Level: Structural Inequalities and Historical Legacies

The macro-level analysis addresses the structural context in which both individual and collective mobilization occurs. Here, “*Nagorno-Karabakh Conflict Through the Prism of Horizontal Inequalities: Theoretical Overview*” (Smbatyan, 2022) and “*From Civic Mobilization to Armed Struggle: Tracing the Roots of the Karabakh Movement*” (Smbatyan, 2025) are particularly instructive, as they posit that deeply entrenched structural inequalities form the bedrock of collective grievances. The analysis of existing empirical data allows to argue that enduring socio-political and economic disparities, often manifested as horizontal inequalities between ethnic groups, serve as a critical impetus for mobilization. The historical trajectory of the NK conflict is thus viewed not merely as a series of isolated events but as the unfolding of long-standing structural tensions that have continually fueled mobilization (Figure 2).

Figure 2. Illustrative roadmap from horizontal inequality to mass mobilization in NK and Armenia (extracted from Smbatyan, 2025, p. 166)



In this macro framework, the evolution of conflict is linked to historical legacies and systemic forms of exclusion that persist across generations. Such legacies include past injustices, discriminatory policies, and institutional neglect that have left deep scars in the social fabric. These conditions create an environment where grievances can be both articulated and exploited, reinforcing the mobilization process. Moreover, these macro-level structures provide the necessary context and supporting conditions (Figure 3) within which the moral and emotional narratives at the micro-level and the group dynamics at the meso-level can be fully understood. Henceforth, contextualizing individual and collective actions within broader societal inequalities, the macro-level analysis completes the multi-scalar picture of conflict-driven mobilization.

Figure 3. Supporting conditions for joining the Karabakh movement (extracted from Smbatyan, 2025, p. 167)

	Stepanakert (NK)	Yerevan (Armenia)
Identity		Ethnic belonging (Armenianness)
Motive	<ul style="list-style-type: none"> • Prevent HI • Protect from state violence 	<ul style="list-style-type: none"> • Prevent HI • Protect from state violence • Eliminate Soviet rule
Opportunity	<ul style="list-style-type: none"> • <i>Perestroika</i> and <i>glasnost</i> 	<ul style="list-style-type: none"> • <i>Perestroika</i> and <i>glasnost</i> • Collective grievance in NK

Together, these three analytical dimensions, emotional and moral motivations at the micro-level, group identity and collective dynamics at the meso-level, and structural inequalities at the macro-level, offer a comprehensive framework for understanding the complexity of mobilization in the NK conflict. Each level interconnects to shape a dynamic process, wherein individual sentiments, collective identities, and historical structures mutually reinforce one another, illuminating the intricate tapestry of conflict-driven mobilization.

Toward a Multi-Level Conceptualization of Conflict-Driven Mobilization

Building upon the theoretical, historical, and empirical insights gleaned from the five articles, this section proposes a synthesized multi-level conceptual framework to attempt explaining conflict-driven mobilization in the NK context. This framework posits that collective action is not the result of isolated factors but rather the product of an interdependent process that spans three analytical levels: the emotional and moral (micro), the collective and identity-based (meso), and the structural and historical (macro).

At the micro-level individual mobilization is strongly influenced by emotional and moral motivations. Here, the decision to participate is framed by personal narratives of duty, sacrifice, and heroism. As the referenced studies reveal, beyond rational cost-benefit calculations, deeply embedded affective responses, ranging from moral imperatives to the value of self-sacrifice, are pivotal. Such findings resonate with Elisabeth Wood's (2003) insights on insurgent collective action, which emphasize that emotional commitments can stimulate individuals into collective movements even when material incentives are absent or uncertain.

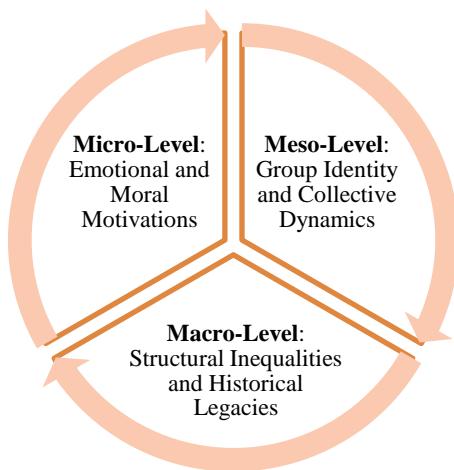
The transformation of these individual impulses into collective action is mediated by group identity and social dynamics. Mobilization is reinterpreted as a process that not only aggregates individual motivations but also constructs and reinforces collective identity. This level captures how shared narratives of injustice and historical grievance coalesce into a broader communal movement. Here, mobilization is both an expression and a reinforcement of group solidarity, a phenomenon that echoes aspects of Tilly's (1978) work on collective behavior, where group identity plays a central role in legitimizing collective actions. The meso-level thus acts as a bridge, transmitting the micro-level's emotional impetus into organized, large-scale collective action.

At last, structural (both vertical and horizontal) inequalities and historical legacies lay the foundational context for mobilization. Persistent socio-political, cultural, and economic disparities, conceptualized through the lens of theory of horizontal inequality (Cederman, Gleditsch, & Buhaug, 2013), set the stage for collective grievances, inequalities generating discontent that can lead to large-scale mobilization (Gurr, 1970). In the NK context, these macro-level forces, rooted in long-standing ethnic, economic, and political exclusions (experienced directly in NK, and vicariously in Armenia) arguably created an environment where emotional and collective narratives found rich ground. Importantly, historical and structural configurations of society appear to not only enable but also shape the expressions of mobilization witnessed at the micro and meso levels.

The proposed multi-level theory thus integrates these three dimensions into a dynamic and reciprocal model. It posits that collective action emerges from the interplay between individual emotional drives, collective identity formation, and the structural conditions that shape both. A schematic model (see Figure 4) visually depicts this interdependence: arrows flowing from the micro (emotional and moral motivations) to the meso (group identity and collective dynamics), and then to the macro (structural inequalities), with feedback loops that indicate how structural conditions can, in turn, amplify or modulate individual and collective responses. Such a model underscores that the relationship among these levels is not unidirectional or hierarchic; rather, the individual experiences of individuals feed into collective dynamics, which are continually reshaped by evolving structural conditions. This reciprocal relationship illustrates how mobilization is sustained over time, even in the face of shifting political or military contexts.

In comparing this framework with existing theories, it is clear that the multi-level model presented here extends these ideas by embedding them within a broader structural context. By synthesizing these theoretical strands, this framework offers a more holistic understanding of conflict-driven mobilization, one that is particularly adept at explaining the complex interplay of factors in protracted conflicts like that of NK.

Figure 4. Schematic model depicting the interdependence of micro, meso, and macro factors of conflict-driven mobilization



In sum, this multi-level theory of conflict-driven mobilization argues that mobilization is best understood as an emergent phenomenon resulting from the interdependence of emotional, collective, and structural forces, a dynamic process where each level reinforces and is shaped by the others.

Discussion and conclusion

Upon swift reflection, asserting that micro-, meso-, and macro-level factors are interdependent might seem self-evident, reminiscent of stating that fundamental aspects of social life are inherently intertwined. Yet, rather than merely echoing a

conventional truism, this paper offers a nuanced, empirically substantiated account of how exactly these dimensions interact within the perplexing context of protracted conflict mobilization, implicitly challenging reductionist narratives and providing a novel perspective on the dynamics of collective action. This paper indirectly engages with established modern sociological theoretical frameworks; especially informed by Giddens' (1984) theory of structuration and Sewell's (1992) articulation of the structure-agency interplay, the paper unpacks how individual experiences are both shaped by and reflective of broader societal forces. Moreover, the synthesis resonates with Tilly's (2004) and Tarrow's (1998) seminal insights into contentious politics, echoing the contributions of Oberschall (1973) and McAdam (1985), who have long argued that the interplay between personal agency and structural conditions produces critical insights into collective action. The synthesis presented in this paper advances a multi-level theory of conflict-driven mobilization that integrates micro-level emotional and moral motivations, meso-level collective dynamics, and macro-level structural inequalities. By drawing on the rich empirical and theoretical insights from the five articles discussed, this work refines our understanding of political collective action in protracted conflicts such as that of NK.

Theoretically, the integrated framework challenges conventional rationalist models by foregrounding the affective and moral dimensions of mobilization alongside group identity and historical-structural factors. This synthesis not only refines the sociology of collective action and conflict by emphasizing mutuality between the emotional, collective, and structural layers, but also builds on established theories thereof. It demonstrates that mobilization is best understood as a dynamic process, where individual sentiments feed into group narratives and are continuously shaped by entrenched systemic inequalities.

Methodologically, the conceptualization adopts a pluralist yet coherent epistemological stance. It reflects upon a combination of qualitative methods, including document analysis, semi-structured interviews, and grounded theory coding, while remaining committed to an interpretivist and constructivist epistemology. The approach prioritizes the lived experiences, symbolic frameworks, and emotional landscapes of actors engaged in or shaped by the NK conflict. Across the five articles, a recurring methodological thread is the effort to treat collective action not only as a strategic or rational act, but also as a morally and affectively loaded experience embedded in specific social contexts. The integration of participatory methodologies serves as a methodological critique of traditional top-down research paradigms in conflict studies. It also underscores the underlying dissertation's commitment to a sociology that is both empirically attentive and reflexively situated, one that acknowledges the researcher's embeddedness and the co-production of knowledge with participants.

Epistemologically, the paper challenges the dichotomy between scientific objectivity and practical knowledge. It advances the view that knowledge about conflict is inherently shaped by its political and social context, and that this context must be part of the analytical lens rather than treated as external to it. In particular, the notion of meta-conflict, conflict over the nature of the conflict (Horowitz, 1991, as cited in Saghatelian, 2015, p. 50), emerges as a key conceptual and methodological

challenge that the dissertation attempts to navigate, not by seeking neutrality, but by fostering methodological openness and analytical consistency.

Such methodological reflection both supports the validity of the multi-level theory and offers a template for context-sensitive research in conflict settings. By integrating participatory approaches, the research underscores the value of co-producing knowledge with conflict-affected communities, a strategy that both enriches the empirical data and challenges conventional, detached analytical practices.

The comparative potential of this framework extends beyond the NK conflict. Given its emphasis on multi-level dynamics, this conceptualization may be tested against other protracted conflict zones, such as Bosnia and Kashmir, where historical grievances, collective identities, and emotional mobilization may similarly intertwine. Such comparative studies could further validate and refine the conceptual model, illustrating its broader applicability across different geopolitical contexts.

While the multi-level framework offers a promising synthesis, it is not free from limitations. One potential trap lies in the risk of oversimplification; by integrating micro-level emotions, meso-level group dynamics, and macro-level structural forces into a single model, there is a danger of glossing over the inherent complexities and contextual specificities of each level. The dynamic interplay among these levels may vary considerably across different conflict settings, and the model might inadvertently assume a level of uniformity that does not exist in reality. Moreover, the heavy reliance on qualitative, interpretivist methods can introduce subjectivity in the interpretation of data, which may challenge the generalizability and replicability of the findings. There is also a risk that the integrative approach could mask critical tensions between individual agency and structural constraints, leading to an overly deterministic reading of mobilization processes.

Additionally, this conceptualization is susceptible to epistemological challenges, particularly regarding the balance between scientific objectivity and the co-production of knowledge with conflict-affected communities. The participatory methodologies advocated in this framework, while enriching, may also complicate the standardization of data collection and analysis, potentially compromising the clarity of causal inferences. Furthermore, the evolving nature of conflict itself means that the proposed model may need continual refinement to remain applicable to different temporal and spatial contexts. These limitations underscore the importance of situating the multi-level theory as a heuristic tool, one that is open to further empirical testing and methodological innovation, rather than as a definitive, one-size-fits-all explanation.

Looking forward, there is adequate scope for future research. Empirical testing of this multi-level conceptual framework across diverse cases would not only strengthen its generalizability but also uncover context-specific nuances that might enrich our understanding of mobilization dynamics. Further quantitative and mixed-methods studies could complement the predominantly qualitative approach taken here, enabling researchers to measure the relative impact of emotional, collective, and structural factors in different conflict environments.

In conclusion, this synthesis contributes to the ongoing discourse on conflict mobilization by proposing a robust, multi-dimensional framework that captures the complexity of human agency in contexts of enduring conflicts. The paper calls for a sustained research effort that combines empirical inquiry with innovative and reflective

methodological practices, which would hold promise not only for advancing academic theory but also for informing effective policy interventions aimed at mitigating the cyclical nature of conflict.

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The author affirms this research did not involve human subjects.

TRANSFORMATIONS IN THE SOCIOLOGICAL PERCEPTIONS OF CHILDHOOD

Tatevik Karapetyan <https://orcid.org/0000-0003-2574-0868>

Master of Social Work, Lecturer, Chair of Social Work and Social Technologies,
Yerevan State University, Armenia. Email: t.karapetyan@ysu.am

Abstract: The article explores the evolution of the position, role, and status of childhood and children as a social category through the lens of sociological thought. In particular, it examines the religious, economic, political, and social influences that have shaped the historical dynamics of childhood perceptions. The article also analyzes the process by which sociology has come to recognize childhood, especially in the context of the concepts "sociological child" and "pre-sociological child" and discusses the current discourse on the interpretation of childhood from constructivist perspectives. Further, the article reflects on how these evolving perceptions influence decision-making concerning children, the development of child protection policies, and the nature of research conducted on children. The analysis synthesizes the multilayered and polysemous nature of childhood as a shifting social status that is shaped by historical, political, and social contexts. This understanding highlights the need to reframe the "position" of the child as a subject in the broader context of the transition from a vulnerability-based approach to one grounded in children's rights.

Keywords: *Childhood Sociology, Social Construct, Child's Subjectivity, Interpretive Reproduction, Autonomy and Participation, Childhood Discourse, Child's Vulnerability, Child Rights.*

Introduction

Perceptions of childhood have undergone significant transformations over time - shifting from understandings rooted in religion and belief systems to constructivist interpretations developed in sociological theories. As a result, fundamental changes have occurred in conceptions of the child's place, role, status, and subjectivity.

Within the scope of this article, the dynamics of the discourse on childhood are examined, highlighting the transition from the idea of childhood as merely a preparatory stage for adult life to its recognition as an independent social category.

The article discusses the body of researches conducted by various disciplines within the broader sociological framework, situated in the context of different stages of societal development. Based on this analysis, the article seeks to identify the factors that have shaped changing perceptions of childhood and to examine their actual impact on both scholarly inquiry and practical developments. Specifically, it explores, on the one hand, the influence of these factors on children's lives and activities during specific historical periods—including parent-child relationships, the protective measures



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offered by the state, and the responsibilities assumed by public institutions—and, on the other hand, the conditions that have contributed to the formation of the contemporary paradigm of the sociology of childhood.

Research Strategy and Methods

This study employs qualitative document analysis as its primary research method, focusing on a variety of sources including academic literature, historical texts, policy and international legal frameworks. Document analysis is recognized as an effective approach for examining social and cultural representations within texts, enabling the identification of underlying meanings and power structures (Bowen, 2009). This method allowed for a comprehensive exploration of the shifting discourses surrounding childhood in different historical and institutional contexts.

The study incorporates elements of critical discourse analysis (CDA) to interrogate the ideological underpinnings and political implications embedded in these representations (Fairclough, 1995; van Dijk, 2001). CDA provides a lens for analyzing how discourses construct social realities and reinforce or challenge power relations, particularly in relation to children's subjectivity, vulnerability, and autonomy.

By combining these methods, the analysis captures both the explicit content and the broader philosophical contexts that inform discursive constructions of childhood. This methodological approach aligns with constructivist paradigms in childhood sociology, which emphasize children's active roles in shaping their social worlds (James & Prout, 1997; Corsaro, 2018).

Overall, this research strategy ensures a robust and context-sensitive examination of how the concept of childhood has been transformed across historical periods and social settings.

Historical and Philosophical Understanding of Childhood

Conceptions of childhood have evolved throughout human history, manifesting within various cultural, religious, and philosophical contexts. In early periods, children were often viewed as socially unformed beings, with perceptions shaped primarily by adult viewpoints and prevailing value systems. Dominating the discourse of the time was the belief that the child was a being born into sin—or, in other words, inherently "evil"—as a bearer of original sin. This perception implied that a child had to be raised in a strictly disciplined environment, which was considered the only path to redemption (Heywood, 2001; Jenks, 2020: 62–63).

This approach corresponds to the label of the "Dionysian child," in which the child is depicted as a dangerous being in need of control and discipline (Jenks, 2020: 63).

The opposing perspective is represented by the model of the "Apollonian child", which posits that the child comes from a world of innocence and harmony and therefore must be protected from the harmful influences of society (Jenks, 2020: 64–65). Jean-Jacques Rousseau is one of the most prominent figures associated with this view, asserting that the child should be seen as an independent being with intrinsic value in the present moment, rather than as a mere prototype of a future adult (McNamee, 2015: 18).

The third model—the concept of the “tabula rasa” or the immanent child—emerged during the Enlightenment period. John Locke argued that the child is born as a blank slate, and that their future is shaped entirely by adults. In this framework, education becomes the most crucial factor (Locke, 1904: 50–53).

This idea laid the essential groundwork for the development of various theories within developmental psychology, particularly those focusing on age-related progression. Among these, the theories of Jean Piaget and Lev Vygotsky are especially noteworthy, as both focused on the cognitive and social aspects of child development (Mooney, 2013: 80–101).

Although these models have made important contributions to the understanding of childhood, they are largely constrained by the temporal and spatial contexts in which they emerged and tend to view the child primarily as a potential adult—that is, as a bearer of traditional conceptions of childhood. This implies that, within the developmental process, the child is mostly perceived as a passive recipient of external influences rather than as an active participant and “creator” in their own reality.

The above-mentioned conceptualizations are challenged by social constructivist approaches, which argue that childhood is imbued with socially and culturally constructed meanings that vary across historical and societal contexts (Pollock, 1983; Wells, 2015). This perspective made it possible to speak of “multiple childhoods” and “multiple types of children” (Dahlberg et al., 1999: 43), thereby rejecting universal and absolutist definitions of childhood.

Thus, the historical and philosophical developments in the understanding of childhood reinforce the idea that childhood has never been a uniform or fixed phenomenon. Rather, it has always been shaped by the dynamics of its temporal and social environment—and, in turn, has exerted influence on those processes—therefore constituting a changing social construct.

The Sociological Recognition of Childhood

The recognition of childhood as a social category is a result of the development of the social sciences and the emergence of new lines of inquiry within them, where children and childhood began to be examined independently of other social institutions—such as the family or education—and broader processes like industrialization. Accordingly, within the discipline of sociology, childhood was, for a long time, regarded as a secondary or outstanding social phenomenon, typically addressed within the framework of traditional studies as a subtheme or subordinate topic.

This was largely due to the fact that science itself has been influenced by the dominant public perceptions described above. Although childhood has always existed, it did not become a subject of significant academic interest until the mid-20th century. This delay can be attributed to the widespread perception of children as passive actors, who are subject to adult authority and therefore only minimally affected by social influences—perceptions that positioned them as subjects with little to no impact on social phenomena (James & Prout, 2015: 12).

This understanding is deeply embedded in functionalist theories. In his theory of the social system, Talcott Parsons presents the child as a kind of societal “mosaic piece” that must be properly shaped to align with the broader structure of society (Parsons, 1991: 80). Davis (1940) identifies four main indicators—sex, age, unit of guardianship,

and nature of guardianship—through which the child is integrated into the social system via socialization. These approaches imply that the internalization of social norms by the child is a prerequisite for becoming a "person." In this framework, the "adult" is equated with the category of the "person," while the child is seen as being on the path to becoming such a "person," and therefore considered incomplete or not yet whole.

However, these theories have been critically challenged by a number of scholars who argue that children must be understood within the context of their own lived experiences, recognizing their capacity for independent action (Jenks, 2020: 19; Corsaro, 2018: 6). A particularly important idea emphasized in this critique is that children are born into pre-existing social conditions, relationships, and power structures (James, 2013: 12–13), which shape their status—not as "potential" members standing outside society, but as fully embedded subjects within the social system.

The understanding of the child's status is further deepened within the framework of theories concerning the reproduction of society members and intergenerational interaction. From this perspective, Karl Mannheim emphasizes the necessity of continuous generational change as a foundational pillar of societal evolution (Mannheim, 1952: 292). Accordingly, childhood is no longer viewed merely as a preparatory stage, but rather as a fundamentally significant period in human life during which identity, relationships, and cultural reproduction are shaped. Moreover, it is a phase that is lived through by all members of society, making it a universal yet socially embedded experience.

The distinction between the "sociological child" and the "pre-sociological child" further illustrates the evolving conceptual frameworks in childhood studies. The pre-sociological child refers to earlier understandings of children—particularly before the mid-20th century—as passive beings, whose social status and experiences were largely seen as derivative of adult society, family structures, or biological development (James, Jenks & Prout, 1998: 26–28). In this view, children were regarded primarily as "becomings" rather than "beings," defined by their future potential rather than their current agency (Qvortrup, 1994: 4–5). This perspective dominated functionalist sociology and much of early social theory during the late 19th and early 20th centuries (Aries, 1962: 128–130; Parsons, 1955: 85).

In contrast, the sociological child emerges from contemporary approaches that gained prominence from the late 20th century onward, especially within the New Sociology of Childhood from the 1980s. This perspective emphasizes children's active role as social agents, viewing them as competent participants in social life, possessing their own meanings, interpretations, and capacities for action within their immediate environments and broader social structures. Recognizing the sociological child challenges static, paternalistic frameworks and underscores the importance of children's voices and experiences in shaping the social world (James & Prout, 1997; Corsaro, 2018).

This sociological evolution was significantly shaped by insights from developmental psychology. Piaget's (1952) theory of cognitive development emphasized children's active construction of knowledge through interaction with their environment, challenging static notions of childhood as mere socialization. Cooley's (1902) "looking-glass self" underscored the importance of social reflection in forming

self-concept, linking early experiences to broader social dynamics. Erikson (1959) expanded these insights with his psychosocial stages, highlighting how societal expectations shape identity formation during childhood. Freud's (1923) work further influenced sociology by revealing how early childhood experiences within family structures and power dynamics shape psychological and social development. Finally, Kohlberg (1981) contributed by showing how children internalize and negotiate moral dilemmas, connecting psychological growth directly to the social reproduction of values. These frameworks enriched sociological understandings of childhood by highlighting the active, developmental, and socially embedded nature of children's experiences (James & Prout, 1997; Corsaro, 2018).

Also relevant here is Gabriel's (2017) perspective, which argues that children themselves define their generational position and the terms by which they are recognized within the adult world. This suggests a reciprocal process—not only one of transmission between generations, but one that also requires the constant redefinition of the relationships between them.

The recognition of childhood as both an independent field of study and a distinct social category opened new avenues for sociological approaches and research, where children are no longer viewed as subordinate or dependent figures, but as active participants (social actors) in social life, contributing through their experiences, the meanings they attribute to life, and their interactions with the surrounding world.

Contemporary Sociology of Childhood: A Constructivist Approach

In contemporary directions within the sociology of childhood, the dominant concept is that childhood is a social construct, shaped by historical, cultural, economic, and political contexts (James, Jenks & Prout, 1998: 25–31). Within this framework, the child is not viewed as a future adult, but as a subject of the present—a competent, active, and independently engaged participant in social life.

A key concept in current studies of childhood is William Corsaro's theory of "interpretive reproduction," which proposes that children not only internalize but also reinterpret their social experiences, thereby creating their own distinct peer cultures (Corsaro, 1992: 166–170). These cultures can, in essence, differ significantly from those of adults. This perspective breaks away from classical models of socialization, in which the child was seen merely as a passive recipient of transmitted cultural knowledge.

These approaches emphasize the diversity of childhood, shaped by gender, class, ethnicity, and cultural contexts (Dahlberg et al., 1999: 43; Wells, 2015). According to this perspective, there is no single, universal notion of "the child" or "childhood"; rather, there exist multiple childhoods, each constituting relatively autonomous social spaces. This implies that analyses of childhood must avoid ethnocentric frameworks and resist viewing children solely through the lens of vulnerability, based on their physiological characteristics or legal limitations. This is because the concept of vulnerability, in practice, stands in contrast to the concept of autonomy in childhood. Moreover, vulnerability is understood to exist only when there is a threat rooted in the dominant social structure (Esser, 2016: 145). As Lee points out, discussions about children's vulnerability—including their dependency on adults—have little or almost no real connection to their physical fragility. Rather, such vulnerability is largely

institutional in nature and, more importantly, codified in national and international legal frameworks (Lee, 2021: 24).

This implies that children should be regarded as citizens - that is, not only as social subjects, but also as legal subjects who possess the rights and the capacities to participate in decisions that affect their own lives. Their status should not be defined solely based on biological maturity, but should also consider their social relationships and potential for influence on social processes (Esser, 2016: 86; Lee, 2001: 1–2). This idea has deeper roots in earlier sociological and interdisciplinary studies. For example, Qvortrup (1994: 4–5) argued that childhood should be conceptualized as a structural category of society, where children have a present, not just a future. Similarly, James and Prout (1997: 8–10) emphasized the social agency of children, positioning them as active participants in social life. Furthermore, Freeman (1997: 28–30) advanced the argument that children should be recognized as rights-bearers and social actors, underscoring the importance of their voices in decisions that affect them. These foundational perspectives collectively highlight that children's citizenship and legal status are not solely determined by biological age, but also by their social and political contexts.

These developments have led to the formation of a new theoretical and methodological foundation, in which children are viewed as full participants in social relationships, and childhood is recognized as a social category imbued with political and cultural significance.

The Transformation of Childhood Discourse and Its Methodological Implications

The consolidation of ideas surrounding childhood as a social phenomenon and the child as an actor has also led to a significant rethinking of research methodologies. While, prior to the second half of the 20th century, the dominant approach was to treat the child as an object of research, subsequent discourses advanced pedagogical, sociological, and anthropological approaches in which the child is recognized as a fully-fledged subject of study (James & Prout, 2015: 69).

The new paradigm relies predominantly on qualitative methodologies, particularly through the use of ethnography, participant observation, and child-centered interviews. These methods facilitate the expression of children's voices, enabling researchers to view children not merely as sources of information, but also as co-authors of knowledge (Spyrou, Rosen & Cook, 2019: 28–29).

These changes have influenced both methodological and ethical practices. There is a growing trend in research to move away from studies conducted "about children" toward those conducted "with children", and even "by children". Such an approach requires a reconceptualization of the researcher's position of authority, and calls for the adoption of interactive, dialogical, and participatory methodologies (McNamee, 2015: 42).

Within the framework of contemporary sociology of childhood, it is widely accepted that children should be viewed as active participants in their own lives, possessing the capacity to interpret and express their lived experiences. For this reason, the concepts of competence, autonomy, and subjectivity in relation to children cannot remain confined to the theoretical realm—they must also be brought to the forefront of the research discourse. In other words, there is a clear shift in approaches to children—

from viewing them as “passive recipients” to recognizing them as “active constructors” (Corsaro, 2018: 7–8).

The transformation of the methodological field in the study of childhood also reflects the evolving nature of social knowledge production, where the emphasis is placed not only on the collection of facts but also on their interpretation within specific social contexts, taking into account the child’s own perspective on their lived experience. This approach contributes to the development of a more in-depth, holistic, and contextually grounded understanding of childhood.

The Transformation of Childhood Discourse and Its Impact on Child Protection Policies

The emergence of public interest in children as a social group coincides historically with the intensification of societal concerns about the future (McNamee, 2015: 22). This interest has brought about not only changes within the social sciences but has also raised political and ethical questions, centered on the dual perception of the child—on the one hand as vulnerable, weak, and victimized, and on the other as an autonomous, reflexive individual. This binary understanding becomes particularly evident in ambiguous or controversial contexts, such as the issue of child soldiers (Spyrou, Rosen & Cook, 2019: 31–32). In such cases, political intervention—whether to “rescue” the child or to allow their participation in conflict as an equal—enters the realm of ethical decision-making.

In this context, the child rights-based approach emerges as a counterbalance to the needs-based approach. It breaks away from the paternalistic framework in which children are viewed solely as objects of care and protection—isolated from society and dependent on adults. The fundamental emphasis on rights shifts the focus toward children’s entitlement to participate in decisions affecting the course of their own lives (James & Prout, 2015: 69).

Nevertheless, child protection often becomes a source of restriction, justified by prevailing assumptions about children’s lack of competence and responsibility. This approach is grounded in a logic of maturation, wherein freedom is granted as a reward following the attainment of a certain developmental stage. Interventions by the state and adults are frequently legitimized through appeals to the child’s best interests—a notion that is itself highly contested and multi-dimensional (Schaffer, 1990: 6).

The child’s best interests are often invoked to justify various decisions, masking the ideological and political choices involved—choices that do not always align with, or serve, the actual interests of the child. At the same time, unlike needs, interests cannot be considered objective or natural; rather, they are the product of cultural interpretations, shaped by context and the worldview of the decision-maker (James & Prout, 2015: 68–69). This issue reveals that even within a rights-based framework, decisions can still be shaped by dominant ideological influences.

However, it is precisely such discursive shifts that have brought children into the realm of the international political agenda, grounded in the principles of the UN Convention on the Rights of the Child. Yet this recognition remains inherently ambivalent. Despite being protected under international law, children continue to be perceived as dependent individuals, whose interests may not necessarily align with the goals of the state or their parents (Lee, 2021: 33). Accordingly, the responsibility to

protect children's rights and interests is often coupled with mechanisms of control and limitations on their participation in decision-making processes—such as the imposition of age- or maturity-related conditions that define when and how children may be included in decisions affecting them.

At the same time, the ideal of a “happy childhood” continues to shape dominant perceptions of childhood—an ideal closely tied to the notion of protecting the child and associating them with dependency and passivity. In contemporary societies, adults have become increasingly aware of children's vulnerability and exposure to risk, and as a result, happy childhood is often framed through the creation and regulation of protective environments—even when such measures may limit children's opportunities for autonomy (Cunningham, 2006: 4375–4376).

The shift in responsibility for child-rearing—from the family and community toward the state—also reflects the transformation of discourse surrounding the child and childhood. Parental autonomy is increasingly presented as a mechanism of neoliberal regulation, through which the process of societal reproduction is reframed within the realm of individual choice and personal responsibility (Qvortrup, 2005: 9).

Taken together, all of these elements demonstrate that the transformation of childhood discourse is a political, ideological, and cultural process—one that redefines the child's place and role within society.

Conclusion

The transformation of childhood discourse within historical and social contexts has led to a shift in how childhood is perceived—not merely as a biological stage or a preparation for the future, but as a fully recognized social status, endowed with distinct rights, responsibilities, and capacities for action. This redefinition has prompted a reconsideration of both theoretical understandings of childhood and research approaches, which increasingly emphasize children as active participants in social life.

This analysis demonstrates that childhood is a multifaceted, diverse, and socially constructed phenomenon. At the same time, children possess their own worldviews, value systems, and pathways of engagement in society, which cannot be fully understood through the prism of adulthood alone. This new perspective calls for an approach to childhood as an institutional domain shaped by political and social conditions, where children's voices must not only be heard, but also should be influential and consequential.

These developments open up new theoretical and practical perspectives for the study of childhood and the development of child-related policies. This implies that childhood should be understood as a category that requires continuous inquiry, and that the knowledge produced around it must incorporate not only external observations but also the perspectives of children themselves—as individuals who generate and embody unique lived experiences “here and now.”

However, recognizing children as rights-bearing and autonomous actors also requires certain reconfigurations on the part of other stakeholders, such as the state and parents—an adjustment that appears to be still only partially acknowledged and therefore only partially realized.

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Conflict of Interests

The author declares no ethical issues or conflicts of interest in this research.

Ethical Standards

The author affirms this research did not involve human subjects.

THE IMPACT OF GENDER ROLE ATTITUDES ON MARITAL SATISFACTION OF EMPLOYED WOMEN AND MEN IN THE CITY OF SARI (NORTHERN IRAN)

Mohammad Esmaeil Riahi <https://orcid.org/0000-0003-1138-6386>

Associate Professor, Department of Social Sciences
University of Mazandaran, Iran. Email: m.riahi@umz.ac.ir

Fatemeh Afradi <https://orcid.org/0009-0004-8052-5428>

Ph.D student, Faculty of Sociology
Yerevan State University, Armenia. Email: fafradi@post@gmail.com

Abstract: The present research aims to identify the level of marital satisfaction among employed women and men and examine the impact of factors affecting their marital satisfaction, such as gender attitudes, in Sari city, Iran. To this end, a number of participants were randomly selected to take part in a survey. After collecting the required data, it was analyzed, and the results were presented. According to the findings of the present study, it was shown that women have more modern attitudes toward gender roles than men, and that men report a higher traditional attitude toward women, which is consistent with many studies. Additionally, men reported higher marital satisfaction than women. The study also found that the most influential independent variables affecting the level of marital satisfaction of the respondents were the respondent's gender, the acceptance rate of traditional gender role attitudes, and the extent of division of gender-specific tasks. Moreover, the results revealed that the more traditional the participants, the more satisfied they were with their marriages. Furthermore, as the perceived fairness of the division of household labor increased, the level of participation of family members in this division also rose. It was also found that an increase in the division of household labor between couples led to greater marital satisfaction. Lastly, this research suggests that the acceptance of traditional gender roles among couples, as an important aspect of their beliefs about marriage and family responsibilities, plays a significant role in the division of household labor and is closely linked to marital satisfaction. Therefore, the study highlights the importance of considering the role of gender attitudes and their impact on marital satisfaction, and suggests that further research should consider other factors, such as women's employment and men's participation in household labor, in order to obtain more reliable results.

Keywords: *marital satisfaction, gender role attitudes, division of household labor, perceived fairness of the division of household labor, employed women, Iran.*

Introduction

The most significant feature of Iranian society in the last hundred years is its transition. It is an undeniable fact that Iran has undergone changes as it transitions from a



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traditional to a modern or non-traditional society, facing challenges related to the conflict between weakened traditional values and the emerging but not yet fully popular modern values. In this regard, Iran, like other developing countries, is experiencing particular issues during this transition from "tradition" to "modernity" (Akbari, 2020; Jamshidiha et al., 2013; Shiri, 2019). Social changes caused by modernity and industrialization have had significant effects on family structures and the status of family members. The evolution of urban lifestyles and women's contributions to society have altered individuals' attitudes toward role distribution and, accordingly, power distribution within the family (Sarukhani & Dodman, 2010). Giddens (2003) believes that family roles and the roles of its members are fundamentally changing, and these changes are particularly evident in terms of individual and social identity. He argues that in the past generation, the relationship between men and women was based on fixed roles, especially in traditional marriages. Women knew what to expect from their marital lives - they were housewives and mothers. However, in the next generation, everything has changed. A woman's role is no longer fixed, and being a woman is no longer a constant or clear concept in terms of tasks and identity. The most important shift is that women no longer live based on cultural or traditional expectations; instead, they create their own identities. According to Giddens, they construct their identities through their social roles. In this context, their self-knowledge has become a "reflexive" project in which they constantly reflect on who they are, how they appear, and what they want to become. Additionally, gender refers to the cultural, social, and knowledge-based differences between men and women. Gender roles are broad concepts upon which many responsibilities and tasks within families are based. One aspect of gender roles is the acceptance of gender-based stereotypes, which refers to the orientation toward either accepting or rejecting these stereotypes for men and women (Riahi, 2007).

In Iranian society, the issue of identity is of particular importance and complexity, especially with regard to women's identities. Women in patriarchal families strongly resist gender stereotypes through the development of their reflexive identities (Abdollahi et al., 2014). Nowadays, many men and women question their traditional gender roles and seek to change their attitudes. Traditional attitudes toward gender roles are evolving, and women are demanding equal gender roles with men. These changes have affected individuals' social identities within families (Riahi, 2007; Beheshti et al., 2021). The Iranian family, too, has undergone major transformations as a result of modernity, and its structure has evolved. Women's awareness of their status and their place in society has increased to the point where they now believe in gender equality. This development reflects an increased awareness of gender identity among women (Dehnavi et al., 2005; Abdollahi et al., 2014).

In the present era, women and girls worldwide are questioning their traditional identities and seeking roles beyond the domestic sphere. Attitudes and definitions related to women and their roles in society have been reconsidered and their legitimacy questioned (Beheshti et al., 2021). Some studies suggest that a significant factor motivating women to delay or avoid marriage is the loss of legitimacy and desirability of the roles that confine women to being solely mothers and wives (Ghanbari Barzian et al., 2023).

In a developing society like Iran, on one hand, there is an emphasis on the contribution of both men and women to development, while on the other hand, the culture and rules remain largely traditional. As a result, a conflict arises between traditional and modern roles, especially for women, and the contrast between traditional and modern structures in society contributes to increasing rates of divorce and marital conflict (Ghasemi & Sarokhany, 2013). In dual-earner marriages, women's employment has not only altered traditional gender role attitudes toward more egalitarian views but has also impacted the division of household labor (Mickelson et al., 2006).

These factors are effective in marital satisfaction

Marital satisfaction refers to the degree of contentment couples feel in their relationship. This means the extent to which they are satisfied with their marriage. Nowadays, due to new values and changes in societies, cultures, women's situations, and women's education, women's expectations toward marital relationships have also changed (Kaplan & Maddux, 2002). Winch (1974) proposes that couple satisfaction results from the adaptation between the present situation and the one expected; that is, the adaptation between the expectations individuals have of marital life and what they actually experience. Therefore, identifying the factors that have the greatest impact on marital satisfaction is essential for improving marital relationships. Low marital satisfaction is associated with divorce, and since, according to Pourshahbaz et al. (2020), Iran has the highest divorce rate among Islamic countries and the Middle East, and is also the fourth country in the world in terms of increasing divorce rates (Ghanbari Barzian et al., 2023; Askari-Noudoushan et al., 2019), examining factors related to marital dissatisfaction is crucial. Several studies in Iran have shown a strong relationship between marital satisfaction and divorce (Tavakol et al., 2017; Pourshahbaz et al., 2020). The relationship between wife and husband marital satisfaction is considered the most important factor and quality determinant index of marriage. A satisfied couple's relationship significantly affects their psychological health and personal growth. Thus, identifying the variables involved in couple satisfaction is highly important when planning for its improvement, and one of the influential variables is gender and gender roles.

Despite significant changes in gender roles in the last half-century, there is limited research on the type of gender attitudes, marital roles, and marital satisfaction. It seems that gender as a variable, along with the type of gender attitude, can affect couples' satisfaction. One aspect of a couple's life that has been shown to be linked to marital satisfaction is the division of household labor, including childcare. The division of household labor between spouses is one of the most contentious issues in contemporary marriages. Employed couples, especially employed women, frequently encounter conflicts between family and work life. This situation can affect the satisfaction of individuals, families, and even their jobs (Li et al., 2020). For example, research comparing the relationship between marital satisfaction and the division of labor between husband and wife in three Asian countries showed that all wives were less satisfied with their marriages than husbands, primarily because wives did disproportionately more household labor than husbands (Fuwa, 2015; Oshio, 2013).

Women around the world still disproportionately carry out household and childcare duties, facing a “double burden” both at home as unpaid work and outside the home as paid work (Bianchi et al., 2000). Scholars have suggested that the division of household activities reflects the power relations between husband and wife in modern family systems (Kiani et al., 2010). Studies in Iranian society about the relationship between family power structure and marital conflicts suggest that there is an association between the family power structure and marital conflicts (Pourshahbaz et al., 2020). Additionally, the family power structure can influence women’s marital contentment, with differences observed between families where both husband and wife work and those where the wife is a housewife (Zolfaqarpour et al., 2004). Therefore, this study proposes that gender and the type of gender attitude, as independent variables in this research, may affect marital satisfaction directly and indirectly through the degree of division of household labor and the perceived fairness of the distribution of household labor.

Statement of the Problem

Contrary to the emphasis of some cultural and religious values on the importance of marriage in the Iranian family, significant changes have occurred in the social beliefs of Iranians regarding the family system, especially with respect to divorce. In contemporary Iranian society, the difference between the attitudes of men and women is a fundamental issue in marital conflict, which is correlated with lower marital satisfaction (Pourshahbaz et al., 2020; Akbari, 2020). In Iran, the divorce rate has rapidly increased compared to two decades ago (Askari-Nodoushan et al., 2019).

According to Akbari (2020), in 2019, 174,831 divorces were reported out of 530,225 marriages registered in the country, which indicates that one divorce occurred for every two marriages. In addition to formal divorce, recent reports and statistics show that emotional divorce is now more common than formal divorce (Arbabzadeh et al., 2022). Therefore, in a society experiencing a high rate of marital dissatisfaction, where half of Iranian couples are dissatisfied with their lives (Eslami et al., 2020), the importance of studying the factors that affect marital satisfaction or dissatisfaction is both a priority and a necessity. Couples with higher marital satisfaction report better individual health (Tavakol, 2017).

Based on existing studies, marital conflict, dissatisfaction, gender attitudes, and traditional values are among the issues in Iranian society that contribute to the rising divorce rate (Arbabzadeh et al., 2022; Akbari, 2020; Pourshahbaz, 2020; Shiri, 2019). On the other hand, the developments of modernity and the resulting attitudes have had a significant impact on the structure of the Iranian family. The institution of the family, like many other institutions, has been exposed to cultural and value changes. One notable effect of macro-social transformations is the change in the role of gender, and consequently, the role of the wife, which, in this context, has undergone a far more significant transformation than the role of men. The transformation of attitudes, values, relationships, and roles is ongoing (Jamshidiha et al., 2013).

Among the important issues in this regard is the relationship between the sexes in the family and society, and the classification of gender equality (Adhami & Roganian, 2010). Inequality in family matters is one of the most significant factors influencing women’s marital satisfaction in Iranian society (Edalati & Redzuan, 2010).

Husbands and wives typically bring a mixture of gender-related attitudes and beliefs to their marriage, which, in turn, affect behavioral patterns within that marriage (Huston & Geis, 1993). Additionally, a woman's gender ideology determines how much power she wants to have in the marriage and in which sphere (home or work) she wants to define her identity (Hochschild, 2003). Therefore, while gender is known as an important indicator of the difference in satisfaction between men and women, it only reveals part of the reality. To better understand couples' satisfaction, their gender attitudes must also be considered (Fruton & Shojaei, 2020). This is because gender roles, such as perceptions of equality and fairness in the division of household labor, are often filtered through gender ideology, which can affect marital relationships. Since gender ideologies vary from person to person, attitudes about appropriate gender roles will also differ (Greenstein, 1996; Bianchi, 2000; Qian et al., 2016).

One of the main reasons for marital dissatisfaction, particularly in relation to gender attitudes, can be attributed to the division of household labor. This issue is particularly contentious for employed married women (Razeghi Nasrabad et al., 2021; Tabatabaei et al., 2019). Feminists, when analyzing household labor, argue that the gender division of household tasks is rooted in gender discrimination, which is itself grounded in the patriarchal structures of traditional societies. Consequently, they believe that the only solution to empower women is their participation in the labor market (Khadivi et al., 2022). Women's employment and their role in income generation can reduce the traditional cycle of household labor and, as a result, decrease men's power within the family, leading to the growth of cooperative family dynamics and shared decision-making. Families of employed women tend to have a more democratic structure compared to families of non-employed women (Bagheri et al., 2009).

Employed women, more than housewives, may perceive household labor as unfair, as the combination of traditional and modern roles can create role conflict and affect their well-being (Balali et al., 2017). Various studies have been conducted on the causes of couples' satisfaction in the country, with most focusing on personal and psychological aspects, communication skills, economic issues, and other factors. However, gender issues and gender roles have received relatively less attention in research on marital satisfaction. Therefore, it is necessary to further explore the impact of gender attitudes, the division of household labor, and the perception of fairness in the distribution of household labor on marital satisfaction for both women and men.

Thus, the current research aims to investigate the effects of the degree of division of household labor and the perception of its fairness on the marital satisfaction of employed women and men.

Theoretical Significance of the Study

The aim of this study is first to identify different views on gender roles (traditional, intermediate, and modern) and, subsequently, to analyze how these diverse views of gender roles influence marital satisfaction levels among employed women and men living in Sari.

This research seeks to identify different views on gender roles (traditional, intermediate, and modern) and to explain the relationship between these views, the division of household labor, and marital satisfaction among employed women and men in Sari city. The study integrates social role theory, gender socialization theory, and the

relative resource bargaining approach to create a new theoretical framework to explain the relationship between gender role attitudes, the division of household labor, and marital satisfaction. Previous research has shown that the type of attitude towards gender roles can significantly affect marital satisfaction (Li et al., 2020; Mickelson et al., 2006). Additionally, researchers have argued that the degree of division of household labor and the perception of its fairness can affect marital satisfaction (Altintas & Sullivan, 2016; Qian et al., 2016; Greenstein, 2000). Therefore, the main goal of this approach is to enhance the theoretical understanding of the role that couples' gender attitudes and the division of household labor, and its fairness, play in marital satisfaction. Furthermore, the results of this study contribute to the existing literature on the relationship between the division of household labor and marital satisfaction among employed couples.

Practical Significance of the Study

Those involved in family development constantly face challenges such as decreasing marital satisfaction, increasing divorce rates, and a decline in marriage rates in Iranian society. Some sociologists even argue that the family has lost its function and become disordered. The phenomenon of divorce, which is one of the primary reasons for the decrease in marital satisfaction in Iran, has been growing despite social and cultural policies and plans over the last two decades. The efforts of policymaking institutions to control and reduce this phenomenon have not been very successful (Ghanbari Barzian et al., 2023).

Studies related to gender, which is one of the newer and more up-to-date areas of sociology, show that the changes caused by modernity, particularly those that have led to changes in values, are some of the most important factors contributing to conflict and an increase in divorce rates in Iranian society. Therefore, it is not surprising that the shift in gender roles and the conflict between the gender attitudes of women and men are considered to be among the most significant reasons for couples' dissatisfaction (Akbari, 2020). The results of Balali et al.'s research (2015) on the factors affecting the conflict between women's roles and its relationship with family conflicts indicate that the division of gender labor and belief in gender stereotypes increase the feeling of role conflict. Thus, the type of gender attitudes and the division of gender labor are considered significant issues within families.

The division of household labor is usually measured by the share of household tasks that women and men perform, and this share is influenced by gender ideology. It depends on the couple (Razeghi Nasrabad et al., 2021). Regarding the consequences of traditional gender ideology, it can be noted that it leads to increased role pressure on employed women due to men's non-participation in household labor, which results in greater marital dissatisfaction. It also affects the reduction of childbearing and lower marriage rates, as well as the discrimination women face in employment. The traditional gender attitude, which emphasizes men as breadwinners and women as housewives, can be a factor in reducing women's economic participation and increasing the gender gap in the economy (Few-Demo & Allen, 2012; Ghanbari Barzian et al., 2023; Gogerdchian et al., 2013; Rostami, 2014).

Although Iranian families have become more modern in their lifestyle and attitudes, positive attitudes toward women's employment, as a dimension of modernity in society,

are growing (Shiri, 2019). With the increasing share of women in higher education and, consequently, the workforce, family structures have moved toward democratization. Additionally, the positive contribution of women's employment to family stability has increased (Khadivi et al., 2022). Afrasiabi and Zia Kashani (2021) showed that women's employment has affected family dynamics, including men's roles and perceptions, leading to changes in the power structure and a move toward family democratization.

Moreover, the increasing trend of women's education and their desire to enter the labor market will influence future trends in women's employment. Despite this progress, however, women's traditional roles, especially in housekeeping and child-rearing, still place a significant burden on them. As a result, the combination of modern and traditional roles for employed women often leads to communication tensions and family disputes (Balali et al., 2015). Research in Iran has shown that women's economic activity outside the home influences the level of male participation in household labor and female participation in family decision-making, with female employment being associated with a decrease in husbands' decision-making power (BakhshiPour et al., 2019). Likewise, women's employment has led to increased marital satisfaction by improving the family's welfare (Khadivi et al., 2022).

Thus, this study aims to explore the change in patterns of attitudes toward gender roles and the participation of spouses in the division of household labor as influential factors shaped by socialization processes. The reproduction of gender attitudes is influenced by people's socialization, and the cultural background, values, and social norms that people adhere to play a significant role in the formation of egalitarian attitudes. The results of various studies indicate that in Iranian families, men tend to have more traditional attitudes toward women and continue to resist accepting modern roles within the family. Consequently, power relations emerge between husband and wife, particularly in the division of household labor, especially in families where both spouses work.

The goal of the current research is to investigate the relationship between the type of gender attitude of couples, the degree of household labor division, its fairness, and the satisfaction levels of women and men in the family. The findings of this study can be useful in assessing changes in the gender division of labor and can provide new policies and programs aimed at improving the relationship between couples within the family.

Objectives of the Study

The general purpose of this research is to investigate the direct effects of gender (male and female) and the type of gender role attitude (traditional) on the marital satisfaction of employed women and men in the city of Sari. This research also aims to examine the indirect effects of gender (male and female) and the type of gender role attitude (traditional) through the variables of the amount of division of household labor and the level of perception of the fairness of the distribution of household labor on the marital satisfaction of women and men.

Sub-objectives:

In this research, the accuracy and inaccuracy of the sub-objectives are investigated using statistical tests:

1. Identifying the level of marital satisfaction among employed women and men in Sari city.
2. Identifying the level of acceptance of the (traditional) gender role attitude among employed women and men in Sari city.
3. Identifying the level of division of household labor among employed women and men in Sari city.
4. Identifying their perception of the fairness of the distribution of household labor among employed women and men in Sari city.
5. Identifying the distribution of marital satisfaction according to socio-demographic variables such as education level, spouse's education level, age, spouse's age, family income, type of occupation, spouse's occupation, number of children, and duration of marriage among employed women and men in Sari city.
6. Examining the degree of correlation between marital satisfaction and some background variables.
7. Examining the relationship between gender (male and female) and marital satisfaction.
8. Investigating the effects of women's and men's (traditional) gender role attitudes on their marital satisfaction.
9. Investigating the effects of the division of household labor between women and men on their marital satisfaction.

Research Methods

The current research adopts a descriptive-survey method in terms of methodology. In terms of its goal, the research is applied, aiming to provide practical solutions, and it is cross-sectional in terms of time. The statistical population of this research consists of all men and women working in government offices and medical centers in Sari city.

The data collection tool is a questionnaire; therefore, the data of the current research is the result of a cross-sectional survey collected using a constructed questionnaire tool. Cochran's classification formula was used to determine the sample size. Based on statistics available on the website of Mazandaran province's civil registration information in 2019, the sample size was set at 386 people, accepting the error value. Sampling was done in three stages: classified, clustered, and available sampling in government offices and medical centers located in Sari city in 2020. In this process, 10 centers were randomly selected from government offices and medical centers. Among employed and married men and women, individuals interested in participating in the study were selected. The inclusion criteria were as follows: being employed, living with a spouse at the time of the study, and completing the questionnaire. Incomplete questionnaires led to exclusion from the study.

Using self-report questionnaires and standardized tools, this research identified different views on gender roles (traditional, intermediate, and modern), the level of division of household labor, and the level of marital satisfaction. Data were collected by distributing questionnaires among employed men and women in northern Iran. Additionally, a preliminary study was conducted among 50 employed men and women to check the content validity of the constructs of the proposed research model by verifying the appropriateness of the translated version of the questionnaires and

ensuring the clarity and comprehensibility of the questions. To ensure the validity of the questions and items in the questionnaire, the opinions of experts were used. Cronbach's alpha coefficient was found to be 0.83.

Demographic Variables

In this study, the variables of gender, age, spouse's age, length of marriage, number of children, education, spouse's education, spouse's job, respondent's occupational status, spouse's occupational status, respondent's income, and spouse's income are included as independent predictors that could influence the study.

Dependent Variable

Marital Satisfaction. Marital satisfaction refers to a positive feeling about marriage and is related to general happiness and contentment with the relationships between couples (Kaplan & Maddux, 2002). In marital relationships, the level of satisfaction is related to the valuable resources exchanged, where couples expect more rewards than costs. It also emphasizes the importance of fairness in the relationship (Sabatelli, 1999).

The **ENRICH Marital Satisfaction Scale (EMS)**, developed by Fowers & Olson (1989), was translated into Persian by Asoodeh & Team (2009). To assess marital satisfaction in this research, the ENRICH questionnaire was chosen, as it has been used as a valid research tool in many studies. Fowers & Olson (1989) used this questionnaire to assess marital satisfaction and believe that this scale is sensitive to changes occurring within the family. Each of the topics in this questionnaire corresponds to one of the important domains of marital satisfaction.

The long-scale form contains 115 items. Asoodeh and colleagues translated the 35-item short form into Farsi with comments and guidance, with written permission from Professor David Elson. After the translation revisions, the Farsi version was reviewed and translated back into English, and the final permission to implement the questionnaire in Iran was granted by Dr. Elson.

In Asoodeh et al.'s (2009) research, using 365 couples (730 individuals), the alpha coefficient for marital satisfaction was 0.68, for communication 0.78, for conflict resolution 0.62, and for ideal distortion 0.77. In this study, using a sample of 364 men and women and a 35-item questionnaire that includes four subscales—ideal distortion, marital satisfaction, communication, and conflict resolution—the marital satisfaction of the respondents was measured with an alpha coefficient of 0.93.

The ENRICH Marital Satisfaction Questionnaire is a 35-item, multidimensional assessment instrument that consists of the following subscales: idealistic distortion (5 items), marital satisfaction (10 items), communication (10 items), and conflict resolution (10 items). The Likert scale used in the questionnaire ranges from one (strongly disagree) to five (strongly agree).

Independent Variables

Division of Household Labor. Household labor, as unpaid and invisible work, is a classic example of gender stratification, which is shaped by cultural beliefs and structural constraints at the societal level (Few-Demo & Allen, 2020).

The division of household labor was designed in Persian based on Cowan & Cowan (1988) and tailored to Iranian culture. To determine the content validity of the questionnaire, 10 faculty members from the Sociology Department reviewed and revised it. Its reliability, measured by Cronbach's alpha, was obtained as 0.65. The questionnaire consists of 14 items answered by couples to describe the division of household labor in various family life areas. The five tasks typically considered women's work include laundry, cleaning, dishes, cooking, and cleanup. The five tasks usually considered men's work include general repairs, yard work, car repairs, taking out the garbage, and grocery shopping. The four tasks are considered shared responsibilities for both spouses.

Gender Role Attitudes

Gender role attitudes refer to distinct ways of thinking about gender and social roles that are socially constructed and influenced by life experiences (Baber & Tucker, 2006). Attitudes about gender roles were measured using the Traditional-Egalitarian Sex Role Scale (TESR; Larsen & Long, 1988) and the Social Roles Questionnaire by Baber & Tucker (2006), adapted for Iranian culture. The scale consists of 30 items. The statements describe attitudes different people hold toward the roles of men and women, with 8 items being reverse coded. This variable was measured on a Likert scale ranging from completely agree to completely disagree, and by summing the scores of the items, an index of gender attitudes was created on an interval scale. In the multivariate analysis, it was classified as traditional, egalitarian, or intermediate. Lower scores indicate more traditional attitudes toward gender roles. To determine the content validity of the questionnaire, 10 faculty members from the Sociology Department reviewed and revised it. Its reliability, as measured by Cronbach's alpha, was found to be 0.84.

Perceived Fairness of the Division of Household Labor

Equality, as a 50/50 division of time and tasks, is not the primary basis for perceptions of fairness in household labor. Instead, fair perceptions of household labor are influenced by various factors, especially gender attitudes and different contexts. Thus, what each couple considers fair varies from couple to couple and from context to context (McDonald, 2013).

Respondents were asked:

How do you feel about the fairness and justice of the way you and your spouse divide household labor? Please mark (x):

- It is very unfair and unjust because I do "all" the household labor by myself ____ (1)
- It is somewhat unfair and unjust because I do "most" of the household labor by myself ____ (2)
- It is fair and just because my wife and I "jointly" do the household labor ____ (3)
- It is somewhat unfair and unjust because my wife does "most" of the household labor alone ____ (4)

- It is very unfair and unjust because my wife does "all" the household labor alone
____ (5)

Findings and Discussion

The results of the correlation coefficient between the variables (age, spouse's age, level of education, spouse's education level, length of marriage, number of children, gender, type of employment, spouse's income, and marital satisfaction) are as follows:

In all dimensions, there is a significant association between the "gender of the respondents" and the marital satisfaction variable. The amount of education and the "conflict resolution" dimension have a positive and direct relationship. This suggests that respondents with a higher degree of education reported greater marital satisfaction in the domain of conflict resolution.

The "division of household labor" has a favorable and direct association with "all aspects of marital satisfaction." According to the results, it is evident that the greater the division of labor and household obligations, the greater the marital satisfaction.

"Perceived fairness of household labor distribution" had an indirect effect on marital satisfaction, without having a direct effect, mediated by the division of household labor. As a result, it can be said that with increasing "perceived fairness of household labor distribution," and subsequent improvement in the division of household labor, marital satisfaction increases.

The results indicate that the majority of men (83%) and women (68.9%) had an intermediate attitude toward gender roles. In the second order, the majority of men had a traditional attitude (12.1%), and among women, a modern attitude (30%) toward gender roles. As a result, it can be stated that considering the intermediate role attitudes both groups exhibited, women had a more modern attitude than men, while men had a more traditional attitude toward gender roles than women.

Additionally, the present study shows the results of examining the direct, indirect, and total standard coefficients of the relationship between marital satisfaction and gender, along with the mediation of gender role attitudes, division of household labor, and the fairness of the division of labor among people. The results indicate that the exogenous variable of gender, in addition to its direct effect on marital satisfaction with a standard coefficient of -0.322, also has an indirect effect with a coefficient of 0.050 through the mediation of gender attitude. Also, by mediating the fairness of division of household labor and the division of household labor, gender has an indirect and insignificant effect with a rate of 0.001. The results also show that the variable of fairness in the division of labor had an indirect effect on marital satisfaction, without having a direct effect, mediated by the division of household labor with a rate of 0.013. As a result, it can be said that with increasing fairness in the division of labor and subsequent improvement in the division of household labor, marital satisfaction increases.

The results of this research, combined with the review of previous studies, show that women have a more modern gender attitude than men. Women's employment, as one of the indicators of modernity, has caused a change in their attitudes, so that, in Iranian society, like many societies transitioning from tradition to modernity, the acceptance of modern roles has increased in recent decades. The type of attitude toward gender roles, which is affected by the organization of society, can vary depending on

the cultural context of the society. In traditional societies, where the culture and laws still support the gender division of roles, men's emphasis on the division of labor and resistance against equal roles can increase the conflict between modern and traditional gender attitudes within couples, thus reducing marital satisfaction. Therefore, the type of gender attitude of women and men can be one of the influencing factors on marital satisfaction (Faizi & Madaghi, 2022). Another factor that affects the level of marital satisfaction and is the source of many marital conflicts is the division of household labor.

Regarding the role of the gender variable, the results of this research indicate that there was a significant difference between the marital satisfaction of women and men, with men reporting more marital satisfaction than women. In terms of household labor, the share of women was greater than that of men. Therefore, not only did women perform much more household labor than men, but the types of household labor that women and men performed were different. According to research conducted in Iran, it is noted that in Iranian society, household labor is still strongly segregated based on gender (BakhshiPour et al., 2019; Garoosi, 2008; Razaghi Nasrabad et al., 2021).

One possible reason why women had less marital satisfaction than men in this study could be their employment status. The primary issue for employed women is balancing roles inside and outside the home, which leads to multiple roles in marital relationships, particularly as parenting and child care responsibilities increase. Gender is one of the strongest predictors of household labor, as even women who are full-time breadwinners report a higher share of household labor, suggesting that gender structures household labor. According to the gender socialization approach, gender roles that assign household labor to women are the result of socialization that is strongly differentiated by gender. As a result, we observe that women perform more household labor than men (Cudeville et al., 2020).

Another finding of this study was that as family members' participation in household labor increases, their marital satisfaction increases. Overall, more than three-quarters of respondents were satisfied with the division of household labor, and only 14.3% were dissatisfied with this situation. A possible explanation for these findings is that women's employment has increased men's participation in household labor, which confirms the exchange-bargaining approach. Wage work and women's participation in family income increase women's bargaining power in the division of household labor. Additionally, the results of this research show that there is a positive relationship between the division of household labor in relation to women and the dimensions of marital satisfaction. The more the division of household labor increases, the higher the marital satisfaction in women. However, no significant relationship was observed between the division of tasks in men's homes and the dimensions of marital satisfaction. These results align with the findings of Amato et al. (2003), who showed that increasing the proportion of household labor done by husbands improved the marital quality of wives but decreased the marital quality of husbands. Similarly, Qian et al. (2016) found that Japanese and Korean husbands who did a higher share of household labor had lower marital satisfaction.

The results of this research also showed that although women had a more modern gender attitude than men, they did more household labor than men. This can be explained by role theory, which suggests that cultural forces pressure women to take on

more household labor. In the context of the effect of attitudes toward traditional gender roles on marital satisfaction, the results of the regression analysis showed that as traditional gender attitudes intensify, the level of marital satisfaction increases. In fact, having traditional gender attitudes in both women and men increases the acceptance of the gender division of labor, which can reduce marital conflicts.

Furthermore, the results of the relationship between marital satisfaction and gender, mediated by traditional gender role attitudes, the division of household labor, and the fairness of labor distribution, indicate that the exogenous variable of gender, in addition to its direct effect on marital satisfaction (with a standard coefficient of -0.322), also has an indirect effect (with a coefficient of 0.050) through the mediation of traditional gender attitudes. The results also show that the fairness of division of labor has an indirect effect on marital satisfaction, without a direct effect, mediated by the division of labor (with a coefficient of 0.013). As a result, it can be said that as the fairness of the division of labor increases, and the division of household labor improves, marital satisfaction also increases. According to the theories used in this research (gender role theory and resource bargaining theory), this study predicts that as women's (financial) independence increases, there will be a more equal division of household labor.

After conducting the study, the hypotheses were answered as follows:

1. **There is a significant relationship between respondents' gender and marital satisfaction, meaning that men have more marital satisfaction than women.** Based on the first hypothesis, the marital satisfaction level of respondents is significantly different according to their gender (men have more marital satisfaction than women). This hypothesis is confirmed because the results of this study showed that men reported higher marital satisfaction than women, and women had lower marital satisfaction than men. This is consistent with many studies conducted in Iran and other countries (e.g., Rostami, 2013; Nourani et al., 2019; Oshio et al., 2013).
2. **There is a significant relationship between gender (male and female) and traditional gender attitude, meaning that men seem to have a more traditional gender attitude than women.** This hypothesis is based on the significant difference in traditional gender attitudes between respondents of different genders (men have more traditional gender attitudes than women). This hypothesis was also accepted because the findings statistically showed that women have more modern attitudes toward gender roles than men, and that men report a higher traditional attitude toward gender roles, which is consistent with many studies. These findings align with earlier research that revealed men in transition societies resist accepting new roles in the family sphere due to concerns about losing privileges previously afforded by traditional societies, especially if societal expectations and policies align with traditional attitudes (Davis & Greenstein, 2009).
3. **There is a significant relationship between traditional gender attitude and the level of marital satisfaction of respondents, meaning that as traditional gender attitudes increase, marital satisfaction increases.** The third hypothesis claims that respondents with stronger traditional gender attitudes have higher marital satisfaction. The results of this study showed that people with traditional

attitudes reported higher marital satisfaction, so this hypothesis is confirmed. The reason for the higher marital satisfaction among traditional gender role holders in this study is that, according to the first hypothesis, men had more marital satisfaction than women. Additionally, in the descriptive findings, it was found that men were more in favor of traditional gender roles than women. Therefore, most of those who accepted traditional gender roles were men, who were also seen to have higher marital satisfaction than women. This leads to the conclusion that higher acceptance of traditional gender roles is associated with higher marital satisfaction. The results were in line with Akbari's (2020) research, which showed that the more gender attitudes tend toward traditional views, the less conflict there is between couples.

4. **As the intensity of respondents' traditional gender attitudes increases, the division of household labor decreases.** The fourth hypothesis suggests that as respondents' traditional gender attitudes increase, the level of family members' participation in household labor decreases (i.e., the division of household labor between men and women becomes less equal, with women doing more). The descriptive results of this research show that most respondents had intermediate gender attitudes, and men had more traditional gender attitudes than women. However, three-quarters of respondents were satisfied with the division of household labor. Based on the results of the statistical test, this hypothesis was not confirmed. It seems that another variable, in addition to traditional gender attitude, affects family members' participation in household labor, which could be the employment status of women in this study. Studies in Iran have examined the relationship between women's employment and their husbands' cooperation in housework based on resource exchange theory. A comparative study by Amini et al. (2015) confirmed that family power structures differ between employed and non-employed married women, with women's employment providing them with resources to increase their husbands' participation in household labor.
5. **As the intensity of respondents' traditional gender attitudes increases, their perception of the fairness of household labor increases.** This hypothesis suggests a relationship between traditional gender attitudes and perceptions of fairness, with higher traditional gender attitudes corresponding to higher levels of perceived fairness. According to gender socialization and social role theory, individuals who grew up with traditional roles, such as women with traditional attitudes, are satisfied if their husbands do less housework, believing it is their main role. Similarly, men with traditional attitudes do not feel guilty when women do housework, as they see it as a woman's job. In this study, this hypothesis was not confirmed according to the regression results, meaning there was no relationship between traditional gender attitudes and perceptions of fairness. This may be due to the variable of women's employment, as employed women expect more instrumental support (such as sharing housework) from their husbands, while housewives expect more emotional support (such as appreciation and gratitude) (Mickelson et al., 2006; Kawamura & Brown, 2010).
6. **As the level of perception of the fairness of household labor increases, the level of participation of family members in the division of household labor**

increases. This hypothesis was confirmed because the regression results show that fairness in the division of labor, with a standard beta coefficient of 0.119 and significance of 0.039, has a positive and significant effect on the division of tasks among people at the 0.05 error level. The more fair the division of household labor, the better the division of labor becomes.

7. **As the amount of division of household labor between couples increases, their marital satisfaction increases.** According to the seventh hypothesis, as the level of participation in household labor increases, marital satisfaction increases. Descriptive findings on the division of household labor (e.g., who does most of the household tasks?) showed that more than three-quarters (69.1%) of respondents were satisfied with the division of household labor, indicating that the division of labor affects marital satisfaction. This hypothesis is confirmed and is consistent with studies conducted in Iran by BakhshiPour et al. (2019), Razaghi Nasrabad et al. (2021), Garoosi (2008), and Noorani et al. (2019).
8. **As the level of respondents' perception of the fairness of the distribution of household labor increases, their level of marital satisfaction increases.** The results of the research show that, according to the sixth hypothesis, the fairness of the division of labor, without having a direct effect on marital satisfaction, has an indirect effect through the mediation of the division of household labor (with a coefficient of 0.013). This suggests that as fairness in the division of labor increases, and the division of household labor improves, marital satisfaction also increases. A lack of perceived fairness in household labor may decrease women's family life satisfaction, in turn increasing the likelihood of relationship and marital dissolution (Kawamura & Brown, 2010; Greenstein, 2009).
9. **The level of marital satisfaction of respondents is significantly different according to socio-demographic variables (age, education, occupation, income, years of marriage, number of children).** There is a positive and direct correlation between education level and the "conflict resolution" subscale, with a correlation coefficient of 0.105 and a significance level of 0.045. This means that respondents with higher education reported higher levels of marital satisfaction in conflict resolution. This finding is consistent with research by Rostami (2014), Islami (2020), and Rashvand Sorkhouleh & Mirhosseini (2022). Additionally, there is a significant relationship between the spouse's job type and marital satisfaction, with a chi-square value of 0.975 and a significance of 0.001. This means that the average marital satisfaction of unemployed respondents (84) was lower than that of employed individuals (121.8), housewives (125.68), and those in other occupations (128.50). Furthermore, there is a significant relationship between "wife's age" and all dimensions of marital satisfaction, except conflict resolution, with a negative correlation of -0.174 at a significance level of 0.001. This indicates that the higher the spouse's age, the lower the marital satisfaction.

Conclusion

The present research aimed to identify the level of marital satisfaction among employed women and men and examine the effect of factors such as gender attitudes on their marital satisfaction. This study also sought to evaluate the impact of variables including gender, attitudes toward gender roles, the division of household labor, the fairness of household labor division, and socio-demographic factors (age, education, occupation, income, years of marriage, and number of children) on marital satisfaction. The results obtained in this study are consistent with the theoretical assumptions based on gender theories (social role theory and gender socialization theory), the relative bargaining approach to resources, and other research in this field.

According to the results of the present study, women were found to have more modern attitudes toward gender roles than men, while men reported more traditional attitudes toward gender roles. This is consistent with many studies. Additionally, men reported higher levels of marital satisfaction than women. Based on the findings of the current study, the most influential independent variables on the level of marital satisfaction were the respondent's gender, the acceptance of traditional gender roles, and the extent of the division of gender tasks in the household. Moreover, the results indicated that the more traditional the participants' gender attitudes, the more satisfied they were with their marriage. It was also revealed that as the level of perceived fairness in the division of household labor increased, so did the level of participation of family members in the division of labor. Lastly, the study found that as the amount of household labor division between couples increased, their marital satisfaction improved. This research also suggests that in Iranian society, the acceptance of traditional gender roles among couples—an important aspect of beliefs about marriage and family responsibilities—can significantly influence marital satisfaction through its relationship with the division of household labor.

Suggestions for Further Studies

Based on the results of this research, the following strategies are proposed to increase marital satisfaction:

1. **Promote Gender Equality:** Efforts to promote gender equality in society and family are essential. Employability policies that encourage women to pursue high-paying jobs represent a clear departure from the male breadwinner model (Köppen & Trappe, 2019).
2. **Increase Women's Employment and Education:** Increasing women's employment and education is one of the most important steps toward combating gender inequality. Women can reduce household labor by increasing their power resources. In fact, women who have more resources tend to resist inequality more effectively. Thus, increasing women's presence in various domains can serve as the basis for many societal changes and transformations (Riahi, 2022).
3. **Encourage Men's Participation in Household Labor:** Increasing men's participation in household labor can significantly enhance couples' satisfaction (Dernberger & Pepin, 2020; Sudkämper et al., 2020).

Finally, we endorse the views of Eagly and Stephen (1984), who argue that changes in gender beliefs should occur at the level of social change. As long as people do not share social roles equally, gender stereotypes - such as the belief that women are inherently different from men - will persist. This means that, until responsibilities like child care and housework are equally divided between women and men, and both sexes equally share the responsibility of working outside the home, these stereotypes will continue.

Limitations of the Study

There are several limitations in this study. First, the men and women who participated were not married couples. If the gender attitudes of husband and wife were measured as a pair, it is possible that the contrast or harmony of their attitudes would have a greater impact on marital satisfaction, as seen in many other studies. Another limitation of this study is that it did not examine employed women and housewives separately. Additionally, all women who participated in this research were employed, so the study did not compare the gender attitudes of employed women with those of housewives.

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Conflict of Interests

The author declares no ethical issues or conflicts of interest in this research.

Ethical Standards

The author affirms this research did not involve human subjects..

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Article in a journal:

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