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Content

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IN SEARCH OF POLITICAL WILL: COMBATING EMERGING SECURITY THREATS IN SUB-SAHARAN AFRICA

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Abstract: The paper examines how political will may limit state power in tackling new security threats in Sub-Saharan Africa (SSA). It identifies the multiple security challenges and how these are exacerbated by limited commitment (or a lack of it) by political actors, who could employ proactive or creative policy action or programs to tackle security crises on the sub-continent. Drawing from a repertoire of existing literature and theorizing political and national security, the paper presents a textual analysis of the situation, arguing that military power or capacity is significantly enhanced or limited by the political action of leaders in SSA countries. It recommends, among others, proactive political action and a comprehensive approach, given the complex nature of the situation, in tackling conventional and emerging security threats on the sub-continent.

Keywords: *Political will, Emerging security threats, Sub-Saharan Africa, State actors*.

Introduction

Why is it difficult to contain simple and complex security threats in Sub-Saharan Africa? With the military might of some African countries, including Nigeria, Ethiopia, and Sudan, why are new security threats emerging and becoming monstrous and

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complex? Are the military strength, tactics, and resources at the disposal of African states inadequate to address or resolve the numerous security challenges in Sudan, the Democratic Republic of the Congo, Somalia, Mozambique, Nigeria, Mali, Burkina Faso, Chad, and the Central African Republic, to mention a few? Is the military incapable of stopping the asymmetric warfare that much of Africa now faces? Or are we contending with a monster that has eaten deeply because of the decline of political will, and complicity of the political actors, which has rather flavored and nourished these security problems? Attempts will be made in this paper to determine the limits of military instruments if political actions are inadequate.

Sub-Saharan Africa faces a multitude of old security challenges, but more critical are the new ones that render military capabilities and arsenals obsolete or antiquated, or at least shatter the myth of army invincibility. While the military will remain relevant in dealing with conventional warfare or security challenges such as belligerence of groups, insurrection within states, or separatist movements, external aggressions from neighboring armies, and common trans-border threats from visible groups, it will take political action or policy decisiveness to make it happen. The trajectory in recent years has been that asymmetric wars and conflicts, such as terrorism, banditry, and all sorts of anti-state movements in Africa, tend to defy strategies and efforts to contain them.

This paper questions the validity of the claim that regular military approach can tackle the new security threats, arguing that the military will remain central, but that in addition to incorporating elements that would suffice in dealing with the dynamics of the new security age, the military looks up to political leadership, political will, and more effective arsenals that are equipped with capabilities to unravel the mystery surrounding new security threats and effectively mitigate them. The central argument is that the armies in Sub-Saharan Africa may not only need better weapons, but would also desperately need better leaders from the highest decision-making level to the military high command. Even with their adequate training and weapons, soldiers still require effective political and military leadership to tackle security threats effectively. Leadership may fail for various reasons. These include a lack of political will, paucity of ideas or cluelessness at critical times, lack of vision, compromises, and disloyalty to the nation or national interest, or when the leaders themselves are complicit in the security threats.

The New Security Threats in Sub-Saharan Africa

Sub-Saharan Africa - particularly the **Sahel**, Lake Chad Region, Great Lakes Region, and the Horn of A**frica**- faces new problems of insecurity, the likes of which were either not known or uncommon hitherto. The security landscape is complex and multifaceted, presenting new challenges alongside old, menacing problems. Cyber security problems, environmental crises such as climate change, transmission of dangerous ideologies in an increasingly borderless international space, faster and increased trans-border movement of radicalized people and weapons, terrorism, health pandemics, and foreign interference are some of the new challenges. On cybercrime, the increasing reliance on technology has opened up new avenues for loose and criminal use of the cyberspace, including attacks on critical infrastructure and financial systems. Furthermore, climate-related challenges, such as desertification, drought, and rising sea levels, are exacerbating existing conflicts and creating new ones over access

to resources. As for foreign interference, the increased involvement of external actors in African conflicts, sometimes with competing interests, can further destabilize the region.

These new challenges continually have a handshake with old issues, including domestic and regional terrorism and violent extremism, thus increasing the tempo, operation, and sophistication of the old problems. Groups like Boko Haram in the Lake Chad Region and Al-Shabaab in the eastern coast of Africa continue to operate, but leverage the new security loopholes and opportunities, causing more instability and violence in these sub-regions. There are increased inter-communal and ethnic conflicts, leveraging the free or easier flow of dangerous elements and ideologies across state boundaries. Tensions between different ethnic or religious groups, often exacerbated by competition for resources, remain a significant source of conflict. Organized crime is an old security problem, but the globalizing system and its opportunities also present new and creative pathways for such crimes as drug trafficking, human trafficking, and other forms of organized crime that undermine governance and contribute to insecurity.

Maritime security is not spared as piracy and illegal fishing in coastal areas pose threats to trade and economic stability. The maritime security of the West and the Horn of Africa is the worst hit. Other new problems include farmer-herder conflicts in Nigeria, in which competition for land and resources between farmers and herders has led to violence and displacement in some areas; weak governance and state fragility, with the Democratic Republic of the Congo, Sudan, South Sudan, Cameroon, Equatorial Guinea, Mozambique, and the Central African Republic being the main culprits. In these countries, countries, weak institutions, corruption, and lack of accountability contribute to a climate of instability and insecurity.

It is pertinent to note that the new security problems, such as climate change and asymmetric conflicts, and the old ones, such as terrorism, have created a new monster in Sub-Saharan Africa, which is forced displacements of persons, culminating in large-scale humanitarian crisis, both within countries and across borders, and the rude disruption of trade, investment, and economic development. In addition is also the erosion of social cohesion and trust by the people in government institutions and their leaders.

A Brief Theorization of "Security" and "National Security"

The new issues identified in the preceding section are existential threats to national security, survival, or preservation. They are also ominous to sub-regional, regional, and global security order, as evident in the manifestations of cybercrime, terrorism, and global climate change. It is thus the responsibility of the state to rise to the occasion and ensure that security threats that can potentially create national, sub-regional, or regional security problems are effectively contained. In Emily Goldman's words, "national security, whether as a process or as an objective, (is) the protection of core national interests from external threats" (Goldman, 2008). While this is static, national security doctrines may be subject to flux, as it refers to the instrumental goals by which national security interests are protected and the means employed to serve those instrumental goals. This doctrinal change is further informed by the cloud of uncertainty that hangs over security matters because of the ambiguity of the nature of

threats (Goldman, 2008). Some of these threats may extend beyond national borders and become existential threats to nearby states or the entire region.

The traditional understanding of "security' and "insecurity" is changing. First, security for our purposes must be understood as a state in which the people of a polity have protection from any form of harm or hurtful situation, and are guaranteed the good life, which is provided by the state. This suggests the all-encompassing nature of security, as suggested by Barry Buzan (1983), who extended it beyond the traditional military terms. Buzan identified the other elements of security, including the ones that are political, economic, social, and environmental. In recent years, the focus has even shifted to human security, which bears a deeper context and dimension. Buzan developed the concept of securitization, which examines how issues are transformed into security threats through speech acts. How does this work? It is a process by which an issue, previously considered a matter of normal politics, is framed as an existential threat requiring urgent and extraordinary measures. A "securitizing actor" such as a government official or institution would use a speech act to convince an audience or the people that a particular issue poses a severe danger to the nation or sovereign existence. This theory posits that an issue becomes a security threat when it is presented as an existential threat through a "speech act". This process involves an actor declaring a threat, identifying a referent object (something to be protected), and justifying extreme measures to deal with the perceived threat. In his (Buzan's) words: "Security is one of the most fundamental human needs: an irrefutable guarantee of safety and wellbeing, economic assurance and possibility, sociability and order; of a life lived freely without fear or hardship" (Buzan, 1983).

In addition, Buzan, in collaboration with Ole Wæver, developed the Regional Security Complex Theory (RSCT), which analyzes how regional patterns of security are shaped by the interactions of states within specific geographic areas. These complexes are characterized by close interdependencies among states regarding their security concerns (Buzan and Waever, 2003). These changes have redefined the modern understanding of security. This same approach helps in defining old as opposed to new or emerging security threats.

It is this expanded concept and theory of security that define our discourse and boundaries in this paper. It also fits the context of new security threats of issues in the world and Sub-Saharan Africa in particular, on which this paper focuses.

Conceptualizing Political Will

Some scholars have described this as a nebulous concept that means little but is much used (Post, Raile, and Raile, 2010). For instance, Scheye (2020), who is skeptical about its definiteness, uses the term to describe the inaction or lack of commitment on the part of political actors to address critical national issues, including national security. Scheye opines that beyond the scholarly usage of the word, policymakers and practitioners also use it to describe their own lack of commitment to an issue. According to him, political leaders may refuse to act on an issue it considers unimportant even if the public thinks otherwise. Such leaders would justify their action as based on lack of the political will to do so, the way the Clinton administration argued that its inaction during the 1994 genocide against the Tusti was informed by a lack of political will. Therefore, beyond the tag or crucifixion scholars make of

political administrations and use "political will" to describe a state or governmental behavior, the actors themselves admit a political will deficit on some national or international issues.

What then is "political will"? It is a context-specific behavior or action in which state actors may exhibit high or low levels of commitment or lack of commitment to tackle issues of national concern. For our purposes, political will is broadened to mean commitment and firmness on issues of national emergency, such as the national security threats identified in the paper. Given that political will is context-specific, given the experience in Sub-Saharan Africa, political will is further understood as the government's willingness to responsibly tackle national security threats. The SSA experience is such that ethnic and religious politics, corruption, and mismanagement of resources and national priorities underline (enhance or erode) commitments by actors to national emergencies.

Accountability and taking responsibility in a timely, measured, and valuable manner are the determinants of political will, and a sustained practice or attitude of this at the national leadership level, will create a national culture in which showing "political will" will be seen as a national behavior. As it was in the case of Sparta in ancient Greece, when swift but well-planned and strategically mapped out responses to external aggression characterized the leadership attitude, which became a Spartan culture, showing the willpower to tackle security risks should be a national culture in a crisis-prone African continent. The Spartans demonstrated political strength and military marksmanship and considered attack as its best form of defense, thus putting at bay any potential or real external aggression. This is what political will should be, and what African leadership has not demonstrated.

The Emerging Security Threats in SSA

Before examining the peculiar situation in each of the Sub-Saharan subregions, it is important to explain the soft security factors in security threats and their management. Soft security factors include the intangible but potent indices such as human behavior, socio-cultural, religious, as well as economic dynamics and digital means in the security trends in human environments. Soft security factors manifest in the solution if well thought-out and there is a state determination to deploy them. However, in explaining their roles in the security threats, soft security risks play out through such ways as criminal behavior and acts that could be influenced by ideologies, cosmologies and philosophies that define human nature, behavior, and human culture, and could be aided by digital resources. The causes of the security threats are sometimes not clear, with economic, religious, and ethnic or social issues, which are often hazarded or employed as theoretical assumptions and could sometimes be far-fetched or inaccurate, being the underlying factors. In addition, criminal elements and their odious acts often go after soft targets such as women, children, harmless civilians in general, and state infrastructure, while their methods are often unconventional. The main goal is to demoralize or weaken the society or state.

In terms of tackling security threats, soft security is the invisible, behavioral, cultural, or digital methods that deter, detect, and respond subtly, often complementing hard measures. While hard security focuses on military, territorial defense, and physical force, soft security addresses non-military, human-centered threats such as

climate change, disease, economic instability, and cyber issues. Put differently, while hard security uses coercion, soft security would rely on cooperation and development.

West Africa

In West Africa, the major security issues are in the Lake Chad Region in general and the Sahel. Beyond the infamous regional security breach created by Boko Haram insurgency in Cameroon, Chad, Niger and Nigeria, the Nigerian state faces a complex array of other security challenges, including banditry, kidnapping, farmer-herder clashes, and separatist movements. These threats are often intertwined with socioeconomic issues, like poverty and unemployment, which can fuel instability. Furthermore, Nigeria is increasingly vulnerable to cyberattacks and other digital threats. The main problem in Nigeria is terrorism. Boko Haram and the Islamic State West Africa Province (ISWAP) continue to operate, particularly in the Northeast. Their attacks, including bombings and kidnappings, pose a significant threat to civilians and military forces. Hundreds of thousands have been internally and externally displaced, while tens of thousands have died. Economic disruptions are a major consequence of this situation, but they have also caused Nigeria much harm in terms of national image and brand.

Banditry and kidnapping closely follow. Criminal gangs engage in widespread banditry and kidnapping for ransom, especially in the Northwest and other regions. These activities disrupt daily life, harm the economy, and create a climate of fear. The third problem that bears semblance to the first two is farmer-herder clashes. Disputes between farmers and herders over land and resources have escalated into violent clashes, particularly in the North-central part of Nigeria, comprising some states, particularly Benue, Plateau, Nasarawa, and Kaduna. These conflicts have resulted in human carnage, untold hardship, displacement, and a huge refugee crisis (United Nations, 2024).

Another main security problem in Nigeria is separatist agitations in the Southeast. The Indigenous People of Biafra (IPOB), like their predecessor, Movement for the Actualization of the Sovereign State of Biafra (MASSOB) in the Southeast, seeks secession, leading to unrest and violence. IPOB has been active using both propaganda and violent means to seek the independence of the Igbo-speaking region of Nigeria, claiming political marginalization, social exclusion from the Nigerian state, and ethnic persecution (Okoli and Ogayi, 2018). The Southeast was particularly embroiled in security breaches and the breakdown of law and order that led to security forces-separatists clashes, killings, destruction of property, mass arrests, abduction, and detention of IPOB leader, Nnamdi Kanu, and a total clampdown on the separatists with military force.

Cybersecurity threats are the new monster in Nigeria's long list of security challenges. Cyber or internet crimes, including hacking, fraud, identity theft, internet love scams, and "Yahoo-Yahoo" or "419" (online schemes to dupe innocent persons), have become a horror that is identified as a Nigerian thing. These attacks affect individuals, businesses, and government institutions. The acts have put Nigeria in a negative spotlight and stripped Nigerians of many legitimate financial benefits and schemes that could help its entrepreneurs, businesses, private individuals, and students at home and abroad, government agencies, and the economy at large. The problem with

cybercrime is that Nigeria is seen as a security threat to businesses and financial schemes by other countries or their citizens.

In addition to the vices mentioned above, there are perennial issues that Nigeria still grapples with. These include youth cultism, armed robbery, ritual killings for money and spiritual power, drug peddling and drug abuse at home and abroad, as well as money laundering and arms dealing. All these have exacerbated the internal security problems, and isolated Nigerians abroad in many cases as their host countries consider its nationals as potential or real threats to their economy or social life.

Given that Nigeria is an influential country in the sub-region and Africa, it has set the patterns for its immediate and distant neighbors in some negative ways. Internet fraudsters from Nigeria operate within and outside the country, working with friends and accomplices in other nations. Like drug dealers and human traffickers, internet fraudsters do not work alone. They operate in local and international networks. Some scammers have reportedly confessed to raising foreign national syndicates who work with them abroad (Omeihe, 2025). These operate with them to swindle private and public individuals or institutions at home or abroad.

Like the above, the Boko Haram movement, which started as a local problem in the Northeast, soon became a Lake Chad Basin issue, with Cameroon, Chad, and Niger affected and brought into the fray in no time. Terrorists in the Lake Chad Region work with their counterparts in the Sahel (Mali and Burkina Faso) to pursue a common cause, namely, to create an Islamic State in the Sahel and West Africa. Bandits and kidnappers also work in concert with accomplices in neighboring nations' villages and ordinary villagers across national boundaries, who hide them or supply the bandits with valuable information or intelligence.

It is arguable that while virtual or internet crimes capitalize on state ignorance, as well as poor governance and weak institutions to flourish, on the other hand, terrorism, banditry, kidnapping, and herder crimes seem to have flourished under state negligence, compromise, or complicity. The removal of the civilian government in Niger, Mali, and Burkina Faso was popular because of this notion, and the outcry of some former military leaders in Nigeria about the government's complicity in the national security crisis also lends credence to the school of thought that the state is complicit in the security crisis of Nigeria. This will be argued later.

East and Central Africa

These two sub-regions have been the hotbed of violent conflicts in Africa. From Somalia to Mozambique, South Sudan to Sudan, and Ethiopia in East Africa, and from the Central African Republic to the DRC in Central Africa, the two sub-regions have witnessed some of the longest and devastating conflicts on the continent. While some are ethnic based, others would be either fueled by natural resources, social exclusion, or religious extremism. The crisis in the two Sudans is a product of a protracted ethnic and political crisis fueled by self-centered political leaders and ethnic warlords. That of Mozambique, Somalia, and the Central African Republic is a blend of Islamism championed by political and ethnic irredentists, while the 30-something-year-old crisis in the DRC has several elements that are present in Sub-Saharan African conflicts. These include ethnicity, social exclusion, natural resources, poor or weak governance, and state failure.

For over 30 years, the Central African sub-region has been facing a complex security crisis, characterized by persistent instability, armed conflict, and humanitarian emergencies. Political instability, weak governance, and deep social fractures contribute to the challenges, with violence affecting both urban and rural areas. The situation is further made convoluted by cross-border flows of foreign fighters, arms, and natural resources, which fuel the conflict economy. The worst hit is the DRC, the Central African Republic, and the central part of Angola. Institutional flaws, weak governance, and a lack of political will on the part of successive administrations to tackle the crisis worsen the DRC crisis. The problems caused by President Mobutu Sese Seko from the era of slave service to the Belgian and Western imperialists became intractable that even the revolution of President Laurent Kabila and the successive administrations of Joseph Kabila and Felix Tshisekedi could not resolve. Ethnic cleansing in the eastern region, particularly North Kivu, South Kivu, and Ituri, where Kinyarwanda-speaking Congolese inhabit, further complicates this (Center for Preventive Action, 2025). The social exclusion, coupled with mismanagement of the region and brazen corruption in Kinshasa, has led to the perpetuation of the crisis, the emergence of non-conformist groups and armed groups like the M23 that seek inclusion in the body politic of the country, to put an end to their persecution. This group also claims that it seeks to return its community members, who either have been displaced internally or have been refugees in neighboring countries, to their traditional lands. In most other cases, more than 100 common criminal gangs, in the name of armed groups, such as the Wazalendo and FDLR, led by ethnic genocidaires and economic profiteers, have turned the region into a war zone. The DRC conflicts have led to several political measures by regional leaders to end the crisis. These have included the Nairobi and Luanda pacts.

However, the lip service paid to the solutions, particularly from Kinshasa, has resulted in flops that made military measures inevitable. As expected, when political will is absent, and the deep-rooted and wider causes of the problems are neglected, the military solution, which was the SAMI-DRC, in which several Southern African Development Community and Burundian forces came together with mercenaries, FARDC and Wazalendo to execute military assaults against the M23 and Rwanda, which they claimed was fueling the M23 in its rebellion, failed. SAMI-DRC was made up of military forces from South Africa, Malawi, Tanzania, the DRC, and, interestingly, Burundi. Burundi is Rwanda's twin country with similar social, ethnic, linguistic, cultural, and historical characteristics, and has always been an old ally of Rwanda for those reasons. They fought together in the First and Second Congo Wars. They served as sanctuaries for each other during the times of ethnic conflicts in Burundi and ethnic genocide against the Tutsi in Rwanda in 1994. Notably, however, Burundi still runs a policy that recognizes ethnic divides, an experience Rwanda officially moved away from many years ago (Amnesty International, 2025; Segun, 2022).

The DRC crisis is even further complicated by identifying and addressing the wrong causes. Rwanda is its main suspect and target, but the government has not addressed the deep-seated apprehensions Rwanda has expressed timelessly about the DRC's harboring of existential threats to its sovereignty and security. Aside the fact that Congo still has active armed troops made up of Rwandan rebels and old foxes,

who perpetrated or identify with the 1994 genocide against the Tutsi, Rwanda accuses the Congolese military of enlisting elements of the FDLR in its ranks and leadership, and fight alongside the Rwandese rebels and genocidaires to try to destabilize Rwanda and return it to the pre-1994 political order (Moncrieff, 2025). The DRC armed conflict, fueled by ethnic cleansing in the north, corruption, external pillaging of resources, manipulation by Western neo-imperialists, political instability, and the legacy of past conflicts, has led to a severe humanitarian crisis, widespread displacement, food insecurity, and increased risks of disease outbreaks.

The South Sudan conflict is another major security issue in East Africa. The crisis is a complex and dire humanitarian situation characterized by ongoing armed conflict, inter-communal violence, economic instability, and the impact of the war in Sudan, leading to widespread displacement and food insecurity. Approximately 70% of the population, or 9.3 million people, require humanitarian assistance in 2025. The crisis is rooted in a combination of factors, including political instability, ethnic tensions, economic hardship, and the impact of regional conflicts like the war in Sudan. Other internal problems have been a struggle for power from opposition parties and proliferation of ethic-based political factions.

The conflict in Sudan is one of the most critical in the world now. It has roots in historical grievances, power struggles, and resource competition, exacerbated by climate change and weak governance. The conflict between the Sudanese army (SAF) and the Rapid Support Forces (RSF) erupted in April 2023, after tensions escalated following a failed transition to civilian rule. The power struggle between the two parties is vicious, leading to a famine and claims of genocide in the western Darfur region.

Southern Africa

Mozambique is a Southeastern country in Africa, whose conflict is primarily concentrated in the northern Cabo Delgado province. The conflict, like the ones in the eastern sub-region of the continent, is a complex and evolving situation rooted in a combination of factors, including socio-economic grievances, political instability, and the rise of non-state armed groups, particularly the extremist jihadists led by the Islamic State. Since 2017, this conflict has led to widespread displacement, humanitarian crises, and hindered development. Rwanda and the South African Development Mission in Mozambique (SAMIM) have had to intervene to end the grave security crisis in this country. A violent insurgency led by the "Islamic State Mozambique" and "Al-Shabaab" (unrelated to the Somali group) has targeted towns, villages, and infrastructure in Cabo Delgado. The conflict also intersects with resource extraction, particularly natural gas and minerals, with communities feeling excluded from the benefits of these developments, fueling resentment and grievances. These social and economic inequalities, coupled with political instability, are the underlying causes of the Mozambican security challenges.

Leadership and the Political Will to Tackle the Security Threats

The question is, what is leadership in Africa doing about the spate of insecurity in their political domains? Under their watch, conflicts and security threats have spiraled out of

control. Two schools of thought tend to answer this question. One holds that many of these political leaders have little or no idea about security governance, lack the vision, tact, and the will to provide security in their countries. The other school is that the leaders are themselves stakeholders and investors in the insecurity in their political domains for different reasons.

Answers to this second argument is not farfetched. In 1994 and even before, the political leadership gave the local population the marching orders to kill fellow citizens and effectively supervised the killings of over one million Rwandans within three months. In Myanmar, Armenia, Germany under Hitler, and Nigeria during the Civil War, the government was at the center of the genocides and mass destruction of lives and property. General Sani Abacha, Nigeria's supreme leader from 1993-1998, once said that if insecurity or security crisis persisted beyond 24 hours, the government was the masquerade behind it (Bamali, 2021).

Abacha was no stranger to insecurity and indeed orchestrated some of the fearsome acts of state-orchestrated violence during his time, using a 'killer squad' led by a soldier to perpetrate bomb explosions, disappearances of political critics, and murders. To get a target or make a political statement or point, the state leaders perpetrate some of the worst crimes or create chaos. Idi Amin Dada of Uganda ruled in the 1970s. His multiple anti-state acts in which his 'research bureau' used violence to silence opposition are well documented. Other global leaders whose reckless use of state violence bled their countries and created a cloud of insecurity included Josef Stalin of Soviet Union, Francisco Macias Nguema of Equatorial Guinea, Jean-Bedel Bokassa of the Central African Republic, Mobutu Sese Seko of Zaire (DRC), Kim Il-Sung of North Korea, Mao Zedong of China, Papa Doc Francois Duvalier and Baby Doc of Haiti, and Pol Pot of Cambodia. Through policies of genocide, political purges, famine, and other forms of repression, these leaders caused immense suffering and loss of life within their domains.

The examples above show that government or political leaders could be directly complicit or responsible for the insecurity in their own country. They invest in it for several reasons. First, they may seek power perpetuation by sowing chaos in the polity. Chaos requires time, policies, and a heavy government presence to clear, which could allow sufficient distraction and a longer stay in power. Second, these leaders could use the elements of violence to keep opposition at bay, silence critics, intimidate the populace, compel obedience or total submission, or create a perpetual state of fear. In some cases, political leaders could invest in chaos for monetary gains, or ethnic or religious reasons (Chin and Bartos, 2024; Kaledzi, 2022). The intractable Boko Haram and ISWAP crisis in Northeast Nigeria has been explained away to be caused by some political, ethnic, and religious leaders who either protect the interest of the terror groups because of primordial sentiments and attachments, or very senior persons in strategic positions in government who secretly benefit from the crisis (Ajala, 2025).

Thirdly, leadership ineptitude, cluelessness, outright incompetence, and unconcern for issues that require a state of emergency are also possible reasons for the rise of new security threats and breakdown of law and order in some Sub-Saharan African countries. In the DRC, the leadership has made several slips while seeking a solution to the protracted crisis in the eastern region. It engaged some armed groups to fight along with its regular army against another armed group, which seeks social and political

inclusion. This led to the government investing in and encouraging asymmetric warfare in the first place and then strengthening terror groups that would later eat up the state. This led to the spike in the number of armed groups, including those that are ethnic militias that seek to overrun Rwanda, thus perpetuating interstate friction with that neighboring country. Today, the armed gangs have risen to over 120 in number. Secondly, the government engages foreign elements (a.k.a. mercenaries) from Europe to fight insurgents and secure the sites of natural resources. Beyond giving away these precious resources to foreigners, this measure also compromises sovereign existence and could compromise national security. Thirdly, the Congolese government seeks lasting peace in its very rich eastern region but continues the politics of exclusion of its own Kinyarwanda-speaking people, which emboldens M23 to continue to fight. A more determined and disciplined army, the M23 easily overwhelms the ragtag Congolese army and its militia allies. Fourthly, the Congolese government abandons its East African partners and the Nairobi and Angolan peace processes, to engage the Southern African Development Community in assembling a fighting force from six countries to tackle its internal security and force its way into Rwanda to bring down the Kagame government, which it accuses of sponsoring M23 (Moncrieff, 2025).

In more recent times, the Congolese President practically begged a foreign power, the United States, which is known to have invested in its internal crisis since the CIA-led murder of their first Prime Minister, Patrice Lumumba, to help in ending the chaos and stabilizing the region. President Tshisekedi offered strategic minerals to the US in exchange for its military support to check M23 and its imaginary enemy, Rwanda. Rwanda is the United States' greatest ally in East and Central Africa (Brugen and Feng, 2025).

The Congolese examples are typical of how not to check new or old security threats, or how to kill national sovereignty. Political incompetence, policy errors, wrong tactics, fruitless military partnerships, and direct invitation of recolonization. So, like complicity in insecurity or investing in it, leadership incompetence is another time bomb. However, a worse time bomb is the lack of political will on the part of African leaders. In 2011-13, the Goodluck Jonathan administration in Nigeria did not take the Boko Haram terror seriously at first. The administration thought the whole drama was another episode of political opposition using the new security threat to bargain or intimidate his administration (Montcloss, 2017). However, by the time the government woke up to the reality in late 2013 and early 2014, the monster had enveloped the serene Nigerian atmosphere, gone beyond the borders, and done a lot of damage to national security, national image, and Nigeria's stature in Africa and beyond. His aides, including security chiefs, were even accused of embezzling most of the allocations to fight the terror (Nnochiri, 2018). The menace ate up the Jonathan administration, and he lost the presidential election in 2015.

It is a popular opinion in Nigeria that the President Muhammadu Buhari administration did not fare any better. He acted well initially and moved the war headquarters to Maiduguri, the center of the jihad. After initial victories, by 2018, Abubakar Shekau, Boko Haram's leader, became invisible, re-emerged the third time after the military announced that he had been killed, and the "tactical wins" became horrific losses when some new security threats emerged. Boko Haram gave birth to ISWAP. Bandits and kidnappers suddenly emerged in North-Central Nigeria and began

a campaign that would outlast the Buhari era. Herders began to replace their sticks with AK-47 and, for the first time in Nigeria's chequered political history, started raiding farms, churches, villages, and towns of harmless people, particularly Christians. These raids went beyond the North-Central Nigerian states of Plateau, Benue, Nasarawa, and Kaduna. Southeastern parts of Enugu and Ebonyi came under attack. Southwestern cities such as Owo in Ondo State, and Ogun and Oyo States had similar tragic experiences.

The Buhari administration was not only slow in responding, but the President himself showed complacency and seemed unconcerned and uninterested. At a point, he claimed that he did not know there were killings in Benue State and that his police chiefs had not briefed him. At another point, he would fly out of Nigeria to attend to other matters at the expense of the tragedies that just happened under his watch. Most times, he would not visit the scene of the incident, but release press statements put together by his media aides. Yet, he would sometimes keep mute or make terse, unreassuring comments. The President had once even said that Boko Haram insurgents were humans, and Nigerians, and could be treated with dignity and forgiven if they repented (Tukur, 2018). This was seen as too soft on a terror group that had wasted thousands of Nigerians, beheading most of them, including Buhari's troops. Buhari had also been silent whenever herders, whom many people claimed were Fulani, attacked or raided villages and farms and killed people. Miyetti Allah, a Pan-Fulani social group, had berated the public for condemning and accusing the Fulani of seeking total control of the rest of the country, and had also stoutly defended the group, always claiming that they had to hand in the menace (Makinde, 2019). However, the same Miyetti Allah would be silent whenever Fulani herders were apprehended for the vicious acts and would threaten any group that tried to lynch their kinsmen who perpetrated those dastardly acts.

The Buhari administration seemed not tough enough against Boko Haram, ISWAP, bandits, and Fulani herders. However, the administration showed decisiveness against separatist movements led by IPOB and Nnamdi Kanu in the Southeast and Sunday Igboho in the Southwest, where military operations were fierce and uncompromising. This appeared like a case of cherry picking informed by ethnic and religious interests. As herders and bandits ravaged the polity in the north, police action was not only inadequate, but there was also a self-appointed middleman in the person of Sheik Gumi, who emerged and became a loud and active mediator between the federal government and the governments of the states affected and the bandit leaders. It could not be ascertained if the governments paid ransoms in the multiple cases of kidnapped citizens and aliens, but there were numerous instances of captives set free, saying their heads were bought with money, and bandit kingpins shared many videos in which they celebrated their prizes (the monies received during their trade). These kingpins granted interviews to foreign cable networks, including the BBC, in which they mocked the government and justified their acts of terror (Ojewale, 2024; The Sun, 2023).

From the responses of the administration, which were either lame or non-existent, the Buhari administration simply went about other business and showed no political will to tame the monster.

In recent times, food insecurity and poverty have been a problem, caused by the immediate side effects of the economic reform programs, that have led to increased

inflation and sharp decline of the Naira value. These have driven more Nigerians to the edge, so that crime, particularly internet fraud and petty stealing, have spiked. Another threat is increased drug use by the youth, resulting in more mental and emotional health problems in the country.

It is too early to assess the current administration, as it has spent only two years in the saddle. The government is still tackling the inherited security problems. The mid-2010s ushered in a new development in Nigeria. Fighting insecurity is considered in some circles as not being a popular thing, as some people are probably offended because insecurity is the major means of buttering their daily bread. To this end, politicians may not exhibit the will to tackle insecurity because they may lose their godfathers, sponsors, or followers. What will it profit a political leader to end insurgency or banditry and lose power in the end? This is one of the main reasons the political will to combat security threats is lacking, which explains where we are in Nigeria and some other African countries.

Finding the Political Will to Combat Security Threats in Africa

A general human assumption is that change is constant even if people are afraid of it. In politics, the elite are more particularly apprehensive and do not want change, because the status quo benefits them or a change could jeopardize their positions or benefits. This may have explained the dire straits most African countries find themselves in dealing with existing or emerging security threats. As mentioned earlier, security threats in Africa are caused by numerous factors. Poor or inept leadership. Economic, political, and social disparities. Politics of exclusion in a heterogeneous society. Weak security governance and lame institutions. Corruption, mismanagement of resources, and misplaced priorities. Wrong or harmful government policies. External interferences. Climate change and its many side effects on local populations. Lack of a political will on the part of those that should fix the problem, namely, the political leaders.

In the same vein, finding the political will to combat security threats in Africa will also be a complex challenge involving various factors such as governance, socio-economic realities, and homegrown solutions to local problems. While some countries are making progress, others face persistent issues with governance, corruption, and resource management, which hinder effective security responses. One country that stands out as far as political will in tackling insecurity is concerned is Rwanda under the current leadership. From the outset, the Kagame administration has been intentional about security governance. One political measure was the eradication of the active and possible causes of national security meltdown. After the genocide against the Tutsi, the government banned identity cards and any emblems that promoted ethnic division or that could remind anyone of the past Hutu-Tutsi-Twa identities. “I am a Rwandan” or “Ndi Umuyarwanda” was enough for any Rwandan, and this national policy went a long away in making Rwandans see more factors such as similar language, culture and religion that bind them together more than those non-existent divisive elements that were created by the colonialists and the previous pre-genocide regime. The people and their security forces in the spirit of oneness, which the government had created by the national policy of integration, collectively combated the horrific experiences that were witnessed between 1998 and the early 2000s when remnants of the genocidal militia

group, the Interahamwe, were invading and killing people in northern Rwanda (Folarin, 2023).

In addition, the post-genocide Rwandan government, since the end of the genocide, has radically transformed the security forces. First, it changed the Rwandese Patriotic Front (RPF) to the Rwandan Defense Force, integrated the good elements of the previous Rwandan Armed Forces (FAR) into the national military, and sent the army on continuous training and retraining, making them more professional and one of the most organized and disciplined armies on the continent.

Again, in some cases, the military and the police receive similar training, with the police only furthering their training in civil matters and relations, thus making them more people-friendly, knowledgeable, organized, and disciplined. The similar training the police have with the military is to make them capable of handling complex civil and internal security problems that would not require the army's involvement. In some African countries, including Nigeria, the army is almost always involved in even less complex security issues like national elections and mass protests. This leads to the militarization of society, which could escalate or cause new security threats. The Rwandan case is different, as the police can handle these "serious" matters more decently and professionally.

Another unique feature of the Rwandan security template is that all the military groups (army, air force, military police, and marine) pass through the same military academies and training, and are all called the RDF. While they specialize in their different chores, such as air and sea matters, they have the same general combat and defensive knowledge (Folarin, 2023). This gives them the advantage of knowing how to handle all common national security threats.

The Rwandan political leadership often demonstrates sensitivity to minor or major security threats. On every occasion, the President takes to the town hall or national discourse on any major or minor occurrence and addresses them at the highest level. He also involves not only the security chiefs and military, but also the entire nation, as his town hall addresses are televised and broadcast live to the nation. No issue is too small or minor; the leadership rises to and addresses it squarely. This gives hope and courage to the population.

So, which way, Africa? First, there is a need to strengthen governance. This will work by promoting good governance, transparency, and accountability, which are crucial for building trust and ensuring that resources are used effectively for security purposes. Second, socio-economic inequalities need to be intentionally addressed. Investing in education, healthcare, and job creation can help reduce the grievances that fuel conflict. Thirdly, African societies need to strengthen regional organizations such as the African Union and foster cooperation among neighboring countries, which can enhance the effectiveness of security interventions.

Another measure to combat insecurity in Sub-Saharan Africa is investment in early warning signs by developing robust early warning systems that can help identify potential threats and allow for timely preventative action. Most African states are more reactive to threats than preventive against them. Having early warning mechanisms will put threats at bay and promote national security. Furthermore, African governments should do more to support civil society in such a way that they could be empowered to play a role in conflict prevention and resolution. This can help build social cohesion

and resilience. Fundamentally, Sub-Saharan Africa should squarely address climate change because while they are the least contributor to the menace, they incidentally the worst affected. Climate change has led to many African social problems, including erosion, drought, famine, land hunger, food shortage, migration, and conflicts between communities, among other problems. Mitigating and adapting to climate change is essential for reducing its destabilizing effects on the region.

Terrorism and religious or ideological extremism have to be effectively, systematically, collaboratively, and intentionally combated. Getting this done requires effective strategies and a multifaceted approach that includes law enforcement, intelligence gathering, and addressing the root causes of radicalization.

Above all, however, political will is crucial. The difference between stable polities and chaotic ones is not only the availability of resources or dynamic leadership. What is central is the political will of the decision-makers to ensure that their domains are secure, peaceful, and stable. The Rwandan template is appropriate to put nations on the continent south of the Sahara on track. There must be a political will for effective security governance and to address the turbulent issues dogging national security.

Conclusion

This paper attempted to identify new security threats in Sub-Saharan Africa and how the lack of will on the part of political leadership has worsened the existing security situation in some of the countries. It identified compromises, complicity, and ineptitude as the main reasons that many African states have failed to tackle simple or complex security threats. Sometimes, minor security issues become a monster and cancerous, which eats up the post-colonial African state. While external interference may sometimes whittle down political will, vested personal or class interest in some national and internal security matters may be the reason why that nagging national security question has refused to go. African leaders need to work conscientiously and collaboratively to tackle emerging existential threats to national security.

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The authors affirm this research did not involve human subjects.

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HELPING PROFESSIONS IN A NEW WAR REALITY: EDUCATION TRENDS

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Abstract: Every crisis brings new challenges for the helping professionals: physicians, social workers, psychologists, as well as pedagogues and communication specialists. The new reality requires changes in the education system to help professionals by integrating new skills and competencies into their professiograms. Helping professionals have to be prepared to work in unusual physical conditions, threats and uncertainty, develop competence to act in emergencies to increase the safety of their beneficiaries. Lack of such skills not only makes the intervention complicated for helping professionals but also worsens the consequences of the crisis for society. This article examines the experience of helping professionals in Armenia, who were actively engaged in the processes of support and assistance to the people of concern throughout numerous crises that have happened in Armenian society since 2020: Covid-19 pandemic, the 44-day war in Artsakh (Nagorno-Karabakh), and the forcible displacement of Armenians from Artsakh to Armenia. The qualitative research unveiled the skill gaps that made the crisis response efforts more challenging for the helping professionals. Based on these findings the authors drafted the recommendations aimed at refining the education of helping professionals. Global crises have become a new normal, making crisis-management skills essential for helping professionals as the required support shifts across stages - from medical and social aid to social-psychological and then psychological assistance - demanding an intersectional, multidisciplinary response. Educating specialists for crisis-shaped environments requires updating professiograms to include rapid response, ethical and clear communication, trust-building, empathy, stress and trauma management, teamwork, volunteer engagement, and professional self-care. These suggestions entail adjustments and enhancements to their skill sets and competencies, as well as revisions to their professional frameworks.

Keywords: *crisis, helping professions, education, professiogram, crisis intervention*.

Introduction

The comprehensive word “crisis” (Greek: krisis - solution, judgment, decisive outcome) became prominent in 2020, featuring in search engines, citizen discussions, media and social networks. The Dictionary of Modern Concepts and Terms describes

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the crisis as "a predicament, a difficult situation, an acute shortage, a lack of something; painful, transitional period; sharp, abrupt change" (Bakanov, Sherevet, 2007). The concept's pervasive usage has led to a certain devaluation, often replaced by the French-sounding term "Force Majeure."

Experts assert that crises exhibit variations in causes, consequences, essence, and content, prompting the need for a multi-level classification to account for diverse factors such as causes, forms of occurrence, forecasting possibilities, prevention methods, and means of management (Suder, 2008).

Literature, discussing anti-crisis management, defines it as the "extreme exacerbation of contradictions in the social-economic system, threatening its viability in the environment" (Barinov, 2007). A crisis is considered as a marginal exacerbation of destructive processes in individual or team activity, caused by hidden or obvious stagnation (degradation) or excessive growth (progress) (Chernozatonski, 1999).

A critical factor for any crisis is time. Prolonged crises, as a rule, are painful and difficult. The extended duration often results from management problems and an inadequate assessment of the situation's essence, nature, causes, and forecasted consequences. On the other hand, an adequate assessment of the crisis duration enables preparation for various scenarios, allowing the development of a solid action plan to neutralize dangerous consequences in a more effective way (Ontanu, 2023). This requires a new approach to the education of helping professionals and revision of their skills and competencies within the qualification framework.

UU Crisis

In 1982, British scientist Sam Black classified crises into "Known Unknowns" (KU) and "Unknown Unknowns" (UU). The first one refers to crises potentially faced due to an organization's activities, while the latter includes catastrophes, accidents, and natural disasters that cannot be predicted (Black, 2011). Since 2020, Armenia has undergone a series of UU crises that have significantly and, in some cases, completely transformed everyday perceptions, value systems, norms, activities, attitudes, and strategies across various sectors. In March 2020, Armenia plunged into a deep crisis triggered by the coronavirus pandemic. In September 2020, another crisis emerged - the 44-day war in Artsakh. The country faced two coexisting crisis realities, as the epidemic persisted (Kazaryan et al., 2020).

The period from 2020 to 2024 can be characterized as an incessant and predictably destructive crisis that ultimately culminated in disaster. On 12 December 2022, under the guise of environmental protests, the Azerbaijani government launched a blockade of the Republic of Artsakh (Górecki, Strachota, 2023) by blocking the Lachin humanitarian corridor which connected Artsakh to Armenia and the outside world. Azerbaijan also sabotaged the critical civilian infrastructure of Artsakh, crippling access to gas, electricity, and internet access (OC Media, 2023). On the 19th of September 2023, Azerbaijan embarked on a new, full-scale offensive against Artsakh, which was followed by the displacement of Armenians from Artsakh. According to the official information, the RA received 101,848 refugees from Artsakh (Sputnik, 2023), facing the third and perhaps the biggest crisis, when the people of Artsakh were forcibly displaced from their homeland. The reception, first aid, and primary assessment of the needs of Artsakh citizens took place in the Syunik region of

Armenia, where hundreds of helping professionals (physicians, social workers, psychologists, etc.) and volunteers worked tirelessly day and night.

Numerous crises happening in Armenia and all over the globe affected the professiograms of helping professionals, reshaping the demand for professional skills and abilities, and posing a new challenge for those, whose job involves assisting people in difficult life situations. These professionals hold roles in education, healthcare, psychology, social work, public health, public administration, and safety.

The following skills and abilities help the professionals to perform more effectively during the crisis:

1. **Timely response.** Time is a decisive factor in crisis management. It brings together the human ability to regulate the biological, social, cultural, and practical dimensions of everyday life. Every crisis is unique and possesses distinct characteristics. Nonetheless, a unified conceptual approach to a rapid response is crucial, involving the creation of backup scenarios and the calculation of potential risks and key decisions. Quick and prompt decision-making and communication are more than essential. Otherwise, it will be impossible to handle the consequences of delay and untimely decisions, as delay is equivalent to neglect and inattention. It is crucial to note that being operative does not mean acting hastily; it means timely.
2. **Feedback-oriented.** The primary task during a crisis for the state and organizations providing social services is to identify and assess the problems and needs precisely and systematically. Feedback from the target audience is essential to study and analyze their requirements, protocol those, and respond accordingly, especially when dealing with vulnerable groups. Responsiveness, targeted and constructive solutions are equally important.
3. **Ethical communications.** The need for information, the necessity to monitor updates about the crisis and to communicate with family members who found themselves in different locations is one of the specifics of any crisis. Today, digitization and the development of information technologies have had a significant impact on the transformation of communications. It is crucial to emphasize media literacy and adhere strictly to information security norms in light of these developments. False agendas from “opposing circles”, news that induces panic, alarm, and fear in the audience, and unreliable information are rapidly disseminated through various channels in both social media and mass media. News and publications that foster division within society, spreading slanderous and hate speech, also find quick circulation. In this context, the primary task is to resist the influence of external propaganda tools, abstain from engaging in divisive communications, refrain from applying labels, avoid discrimination, and immediately prevent such development. During crises, building and strengthening trusting relationships between all parties involved in crisis communications is crucial. This includes fostering collaboration between the persons of concern and the organizations supporting them. In such situations, all parties become partners, sharing a common direction and goal. Today, it is essential to work comprehensively, involving the state, NGOs, local self-

government bodies, experts, opinion leaders, and influencers in the communication process.

4. **Positive thinking.** In crises, people develop negative attitudes towards social, cultural, spiritual, and even natural objects. Helping professionals help to transform this attitude into positive thinking. This varies from the positive perception of the new physiological body to the positive attitude toward new circumstances of the social, cultural and physical environment. This helps to develop a positive vision of the future.
5. **Building trust.** Amidst the overwhelming torrents of uncontrollable information flows, society always searches for heroes – people, faces, individuals, and figures capable of communicating trust and care. Such individuals not only gain attention but also become trustworthy in the eyes of the public.
6. **Care, Empathy, Sympathy.** In crises, societies grappling with humanitarian disasters find themselves in an uncontrollable state of anxiety and fear, as a result of which they become hypersensitive and vulnerable to the external environment. In such times, prioritizing careful, discreet, cautious, and empathic communication becomes essential in the constant noise of information and fake news streams. Carelessness and, more significantly, indifference have a detrimental impact on the psychology of individuals who have undergone suffering. This, in turn, complicates the process of fully integrating and adapting to society.
7. **Professional Self-care.** Helping professionals engage with individuals, families, and groups who have experienced significant trauma and recent crises; exposure to such clients and the suffering they experience may become emotionally demanding (Bloomquist; 2015). Incorporation of professional self-care into the courses for helping professionals is very important to prevent professional burnout and secondary traumatic stress, including the risk factors associated with crisis (Jason, 2014). Professional self-care contributes to wellness and stress reduction both of the professionals and the beneficiaries. Professional self-care is recognized among the five primary domains of self-care practice together with physical, psychological, emotional, and spiritual self-care (Saakvitne & Pearlman, 1996).
8. **Internal Communications and Teamwork.** Equally important is not to overlook internal communications, especially considering the overstressed nature of the receiving party involved. The added stress can have a radical effect. Internal communication must maintain a unified messaging approach, with those related to the vulnerable party acting as its bearers. Communication should center around the same values and be conveyed with the same tone of voice.
9. **Engaging volunteers.** Crises stimulate spontaneous responses by individuals and voluntary groups from within and outside disaster-affected communities, as individuals and groups often become more unified, cohesive, and altruistic in such events. Volunteers can support authorities in building situational awareness and provide extra capacity when resources are scarce. They have

proven to be useful in many disaster cases. Volunteering comes with significant coordination, integration, communication, logistical, and health and safety challenges for the volunteers and disaster management organizations. Finding a right balance between volunteering and professionals is complicated. Lack of formal rules and procedures to guide volunteers can create tension. Volunteers should be considered as extra pairs of hands and guided by helping professionals to proceed and fasten the routine activities including: to build self-preparedness and support networks ahead of emergencies to reduce potential disruptions, dislocations, or damages. Social media is becoming an important source of information to better manage disasters, including the informal volunteer involvement (Nahkur et al., 2022).

10. **Stress management.** It is important to learn to realistically assess the situation and stimulate the development of stress resistance. Thanks to these qualities, the helping professionals are able to overcome emotional overload and, despite irritating factors, maintain inner balance and proceed their activities.

Research Methodology

The goal of this research is to understand the challenges that helping professionals have faced during the crises, to identify the essential competencies required by helping professionals in times of crisis, and to develop the professiogram of crisis response skills and abilities for them. The research seeks to understand how the prerequisites for professiogram (Dereka, Melnyk, 2021)[1] of these professionals have evolved, and how educational institutions should adapt to these changes. The research results will contribute to the improvement of the professiograms of helping professionals and development of the recommendations for educational institutions to adopt those changes.

To accomplish these objectives, the study addressed the following questions: what challenges posed by crises did the helping professionals face in Armenia? What competencies, including soft skills, are most sought after among helping professionals in the crisis context? How can educational institutions respond to these changes? What changes are needed to enhance the helping professionals' resilience in working during crises?

30 social workers, psychologists, physicians, and volunteers, who were assisting the people during the pandemic, war, post-war crises, and integration of forcibly displaced people from Artsakh in Armenia, were interviewed. The exponential non-discriminative snowball sampling method was used to reach out to the respondents. The sampling size was determined by the information saturation, the point at which relevant new codes and categories were found in the data (Hennink, Kaiser, 2021).

[1] According to Markova (cited by Dyakova and Deryabina) a professiogram means scientifically grounded norms and special requirements for the professional activity and personal qualities of a specialist that allow him/her to do effective and productive work and to create conditions for the development of his/her own personality.

Research results

Crisis Intervention Activities

The geography and scale of crises caused by natural disasters, pandemics, and human interventions, such as war and armed conflicts, are expanding. Crisis always contains a threat to human life, their health, and property. All the crises result in unpredictability, unexpectedness, destructiveness of consequences, and instability of existence which infiltrates the person's sense of self (Sellnow, Seeger, 2020). Along with crisis the social environment changes, new reality enters our everyday lives transforming into a new normal.

When helping people affected by a crisis a specialist has to answer the following questions:

1. What's the point of the process between the person in the crisis situation and the helping professional?
2. What characteristics, attitudes, knowledge, and skills are needed to be able to help and support the client?
3. What inner strength of the client could be used in the process of help?
4. What challenges do people face in the crisis situation?
5. What techniques and approaches could be used by the helping professionals?

This communicative process between the people in difficult life situations and the helping professionals is important for the professional development and education of the specialist. It shapes the ability to honestly evaluate professional limitations and be responsible for crisis management. To be able to manage the crisis helping professionals should learn to design the alternatives for the future.

In the preliminary stage of crisis prevention and development of possible crisis scenarios, the crisis intervention plan should be developed, which includes building networks with different stakeholders. It is important to identify those who are most likely to be affected by the crisis. Different scenarios have to be considered by the helping professionals. The situation changes when the helping professionals are affected by the crisis themselves. Educating the helping professionals considering different scenarios, including stress and anger management is very important.

The next stage includes crisis intervention activities aiming at minimization of the direct consequences of the crisis: key personnel should train the volunteers, an intervention plan should be developed, potential threats should be discussed and the most vulnerable groups of the population should be identified. The general supervising body responsible for the crisis management should be confirmed. It should be noted, that the simultaneous work of different bodies issuing orders will prolong crisis and hinder the helping measures negatively affecting human subjects. Depending on the crisis intervention goals the supervising body should conclude when the intervention should be completed and/or transitioned to the organizations responsible for help and support in the routine situation and regular circumstances. This stage usually targets those mostly affected by the crisis, who need long-term intervention and post-crisis support.

The critical question about what would happen if there was no intervention should be asked as well to be able to evaluate the effectiveness and efficiency of crisis management. Only in this case the intervention can be evaluated as successful or failed.

Communication Management During the Crisis

A crisis intervention plan for helping professionals includes organizational issues (Who is generally responsible for crisis management? What helping professionals should be involved in each step of the crisis intervention? What resources are needed? What data should be gathered? The intervention methods (What is the action plan? What are the evaluation criteria?), and the resources (financial, material, and human resources) should also be taken into account.

The communication plan is one of the core logistical issues during the crisis intervention. It is extremely important to identify the target audiences for communication. The research results demonstrate that for Armenia the international community, donor community, professional communities, persons of concern, and citizens who are not affected by the crisis directly should also be considered. Media relations are also one of the core intervention activities. Each of these communication dimensions should include information about the crisis, its impact, and prospects. The measures taken by the government and other responsible bodies to manage the crisis and their justifications should be presented as well. Lessons learned are especially important for those who are not affected by the crisis directly; it is a "promise" to be more prepared for the next crisis. Massages providing instructions on mandatory and possible steps for those directly affected by the crisis are of key importance. Crisis communication should contain messages properly interpreting the crisis and building the attitude towards the crisis situation and its consequences to manage the stress and anger of the citizens. Another challenge for communication specialists is gossip control since gossips have to be managed to prevent panic and uncontrolled actions. All the members of the professional helping team should be regularly updated about the action plan and their further activities, localities, and timing.

Professional Challenges Identified by Helping Professionals in Times of Crises

In times of crisis, helping professionals face numerous challenges that test their skills, resilience, and adaptability. During their day-to-day responsibilities, they are tasked with the following responsibilities (Maddocks, 2018):

- Identifying individuals in need
- Need assessment
- Situation analysis
- Determination of clients' objectives
- Researching, recommending, and advocating for community resources
- Managing case files and documentation
- Delivering supportive and therapeutic services

Research highlights that 2020 was particularly challenging for helping professionals in Armenia. Many lacked experiences in crises and were not equipped with the necessary skills, clear instructions, tools, or procedural systems. They often found themselves torn between standard procedures and the new needs that emerged from the crisis, acting based on intuition without a clear action plan. However, the crises in 2020 were followed by new ones in Armenia. The continuous attacks by Azerbaijan and the blockade of Artsakh were followed by the

forcible displacement of Armenians from the Republic of Artsakh, as already mentioned. Though helping professionals enter every subsequent crisis with more knowledge and experience, this knowledge and experience need systematization, institutionalization, and integration into educational programs. This would result in additions to professional competencies and a revision of the professiogram.

Some of the main problems directly affecting the work of helping professionals during crises, are as follows.

- **Insufficient knowledge of the trauma consequences**: Every helping professional should be aware of what to expect from a person who has experienced trauma within the scope of their profession.

> "*We had a lack of knowledge and experience in working with traumas. Even though it mostly refers to psychology, during crises, it is crucial to know how severe trauma - loss, death, or even material loss - affects people. We need to understand how individuals act and what to expect from them. We should be equipped with special soft skills to tackle this problem without encroaching on the field of psychology while still providing appropriate social-psychological help" (female psychologist, 27 years old).*

> "*Skills in working with trauma, including primary response, releasing emotions, and bringing people to rationality quickly so they can make decisions at the moment, are essential. We need to provide crisis counseling, quickly assess risks 'at a glance,' and, for example, recognize and identify risky situations at reception points with many people" (female physician, 30 years old).*

- **Skills in managing emotions**: Helping professionals are human too and can undergo the same traumas, yet it should not affect their work.

> "*We should be emotionally stable. As an Armenian, it is hard for me to see my country in such a difficult situation. However, I should know how to manage my emotions so I can help others experiencing the same emotions" (female psychologist, 34 years old).*

- **Lack of appropriate self-care:** Lack of professional self-care often occurs in the routine work of helping professionals. However, in times of crisis this gap doubles.

> *"We should take care of ourselves. However, contrary to this, helping institutions support day and night work, but that's not right" (female social worker, 43 years old).*

- **Management of timely response**

> "*So many people were waiting for our help, and we had to respond quickly, without wasting time, and most importantly, rationally and effectively, which was really challenging when you don't have much experience in it" (female social worker, 30 years old).*

- **Special subjects not included in the educational system:** To further advance the soft skills of helping professionals, more specified subjects should be covered.

"*Generally, we should cover subjects such as crisis management, social work in crises, social work with trauma, and many others in this context. I see them in the form of practical camps, where you experience real-life conditions and learn on the spot" (male social worker, 24 years old).*

"*We should have a general subject regarding social work in crises" (female social worker, 33 years old).*

"*There should be a subject regarding cultural diversity and respect, or ethics. This time, differences in language, mentalities, and the division of 'ours' and 'yours' were evident" (male physician, 27 years old).*

- **Skills in running ethical communications**

"*It's of utmost importance to know how to respond to people's problems without pity. General political science knowledge is also needed in this situation" (male psychologist, 36 years old).*

A crisis combines external and internal conditions hindering a person from achieving their goals in physical, social, cultural, spiritual, practical, and temporal dimensions of life. It triggers deviations in individual and social development. In addressing a crisis, helping professionals should adopt crisis intervention strategies, which restructure the whole logic of service delivery. Any crisis requires the revision of the value system and the establishment of correspondence between a person's value structure and their current situation. Crises necessitate well-organized activities aimed at restoring the integrity of human existence in different areas.

In times of crisis and multitasking scenarios, new requirements emerge for helping professionals, including not only professional knowledge and experience but also additional competencies expressed in the 4C formula: creativity, communication, collaboration, and critical thinking (Kembara, Rozak, Hadian, 2019). These competencies prove essential in overcoming the challenges posed by crises. The evolving requirements for the professiogram of the helping professionals emphasize that specific competencies and skills are crucial for achieving the desired and predictable result.

Based on expert assessments, to be effective, helping professionals need such competencies as diligence, initiative, responsibility, time management, self-care skills, trauma management skills, the ability to find solutions in non-standard situations, and the capacity to collaborate in times of crisis. However, the most critical quality is the ability to think outside the box. Furthermore, communication skills play a crucial role – the ability to understand the needs and motives of individuals, adapt to them during communication, and understand the perspective of the person with whom contact needs to be established. This ability characterizes decentralized thinking. Helping professionals also require personal characteristics like presentation skills, teamwork proficiency, organizational abilities, and the capacity to swiftly complete tasks.

Conclusion

Numerous crises happening in the different parts of the world and affecting big amount of people became new normal for the first quarter of the 21st century. This emphasized the importance of crisis management skills for the helping professionals. Research results helped to outline key skills and abilities that should be included in the professiograms of the helping professionals.

On the different stages of the crisis the type and direction of help and its volume changes. On the first stage medical and social support is crucial, psychological help is not as urgent. On the second stage social and psychological support prevails. During the last stage psychological assistance is mostly needed (Burmistrov, 2006). This is true for those directly affected by the crisis, but not for their relatives, the least need psychological assistance from the first stages of the crisis. Intersectional and multidisciplinary approach during the crises is utmost important for timely, targeted and effective response.

Helping professionals should be educated to help people to navigate themselves in the environment transformed because of the crisis, providing relatively ordered information, set general life values and be responsible not only for social, but also for physical well-being of their selves and the persons of concern. This requires changes in their professiograms. Social workers, pedagogues, psychologists, doctors professiograms should include the following skills and abilities: timely response, feedback-orientation, ethical communications, positive thinking, building trust, care, empathy, sympathy, professional self-care, stress and trauma management, internal communications and teamwork, engaging volunteers.

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Ethical Standards

The author affirms this research did not involve human subjects.

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NAVIGATING A GLOBAL CRISIS AWAY FROM HOME: CHALLENGES AND COPING MECHANISMS OF FOREIGN NATIONALS DURING THE COVID-19 PANDEMIC IN SOUTH AFRICA

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Abstract: This paper looks at the experiences of foreign nationals in South Africa during the COVID-19 lockdown by exploring the challenges they faced and the coping mechanisms they employed. The COVID-19 lockdown affected almost everyone living in South Africa, but foreign nationals who often have pre-existing vulnerabilities seem to have been severely affected. Existing studies show the impact of COVID-19 on locals, and limited research shows the impacts of the lockdown on foreign nationals and how they handled such challenges in South Africa. This paper uses the social networks theory to understand how foreign nationals have dealt with COVID-19-induced challenges. Methodologically, the paper used qualitative methodology where data was collected through document analysis and in-depth interviews with foreign nationals from various African countries. The key findings are that foreign nationals faced challenges like limited access to healthcare facilities, hunger, loss of employment, xenophobia and their social networks helped them to cope with these challenges. The paper concludes that the South African government lacked the political will to handle the challenges faced by foreign nationals during the COVID-19 pandemic. Therefore, the government should show political will in future pandemics or state of emergency by ensuring that what it promises, its policies and its practice align.

Keywords: *Lockdown, COVID-19, South Africa, social networks, foreign nationals, strong ties, weak ties*.

INTRODUCTION

This paper explores the challenges foreign nationals faced and the coping mechanisms they employed during the COVID-19 lockdown in South Africa (SA). SA recorded its first COVID-19 case on 1 March 2020 and 18 days later the number of cases rose to 402 cases (Modisenyane et al., 2022). This rapid increase in COVID-19 cases prompted the president of SA Cyril Ramaphosa to announce a national lockdown on 23 March 2020 to stop the spread of the virus and to prepare the health systems for a surge of COVID-19 cases (Mukumbang et al., 2020). Even though the COVID-19 lockdown has affected everybody living in SA, foreign nationals who are a population with pre-

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existing vulnerabilities were severely affected (Mukumbang et al., 2020). Foreign nationals are vulnerable because they often lack ample means to cushion themselves from the negative effects of the pandemic (Mutekwe, 2022).

The South African government's response to the pandemic included a stimulus package worth R500 billion, a temporary employer/employee relief scheme funded by the Unemployment Insurance Fund (UIF), compensation fund benefits for contracting the coronavirus occupationally, and an increase in the value of existing social assistance grants (Olivier & Govindjee, 2022). A special COVID-19 Social Relief of Distress Grant (SRDG) of R350 per month was also introduced for unemployed citizens, permanent residents, and refugees, excluding various categories of non-citizens (Gronbach, Seekings, & Megannon, 2022). However, there is a lack of studies showing the utility of such relief measures on foreign nationals and the means of coping they employed in cases where they may not have accessed such government relief measures. This paper articulates foreign nationals' COVID-19 challenges, coping mechanisms, and experiences in accessing government relief measures in SA.

Studies on foreign nationals during the COVID-19 pandemic in SA have focused mainly on the challenges they faced (Olivier & Govindjee, 2022; Msabah, 2022; Kavuro, 2022; Mushomi et al., 2022; Mukumbang et al., 2020) without detailing their coping mechanisms. In this regard, literature shows that the phenomenon of foreign nationals during COVID-19 was complicated and characterised by economic, health, and protection crises (UN, 2020). For instance, foreigners faced challenges like job losses and reduced income (Mutekwe, 2022; Jobsen et al., 2021), limited access to healthcare facilities and vaccines (Mushomi et al., 2022), xenophobia, expired documentation, arrests, and deportations (Gordon, 2024), and housing and food challenges (Schotte & Zizzamia, 2022; Hart et al., 2022). In addition, studies that focused on both challenges and coping mechanisms like Mutekwe (2022) do not ground such experiences with a theoretical explanation. Therefore, this study provides both challenges and coping mechanisms read through social networks theory.

Previous studies on foreign nationals and their social networks focused on relationships between their existing networks in the country of destination and the decisions involved when migrating (Bakewell, 2009; Klvanova, 2009) or on the role of social networks in facilitating the integration process of foreign nationals in their destination (Hoang, 2011; Ryan, 2011). These studies have used social networks theory in contexts other than SA, while a study by Nystrom (2012) in Johannesburg, SA highlighted the importance of social networks throughout the entire migration process. Similarly, Muchemwa (2017) and Muchemwa and Batisai (2024) focused on the role of social networks in residential choice amongst Zimbabweans residing in Hillbrow, Johannesburg, SA. This paper adds to literature on foreign nationals and social networks theory by focusing on how foreign nationals used their social networks to cope with COVID-19-induced challenges in SA. To explore foreign nationals' challenges and coping mechanisms, this paper is guided by the following objectives.

- To explore the challenges faced by foreign nationals in SA during the COVID-19 pandemic.
- To examine how foreign nationals in SA coped with COVID-19-induced challenges.

The paper argues that foreign nationals in SA faced socio-economic, health, and protection-related challenges and they struggled to access government relief measures. As a result, they relied on their social networks (families, friends, colleagues, and kinsmen) for survival during the pandemic. This paper starts with a review of the literature and an explanation of the social network theory. Next, the paper provides an outline of the methodology, followed by a presentation, discussion, and analysis of the findings before concluding the paper.

LITERATURE REVIEW

Challenges of foreigners in other contexts

Literature shows that foreign nationals in other contexts faced challenges like limited access to healthcare facilities and governments allowed them to access their COVID-19 alleviation services for free. For instance, King Salman of Saudi Arabia gave access to treatment for everyone suffering from COVID-19 including foreign nationals (Groupe URD, 2020). Similarly, in Portugal, foreign nationals were given full access to all services that permanent residents were entitled to during the COVID-19 lockdown (Meer & Villegas, 2020). In England, COVID-19 was added to Schedule 1 of the National Health Service Regulations on 29 January 2020, which resulted in free diagnosis and treatment of coronavirus to anyone including foreign nationals (Meer & Villegas, 2020). Meghan et al. (2021) noted that African countries like Sudan, Djibouti, Kenya, Ethiopia, South Sudan, and Uganda responded by including free or subsidized access to COVID-19 healthcare services for foreigners. However, in other settings, foreign nationals faced challenges in accessing health care services. For instance, in Libya, migrants did not have access to health care because of a lack of documentation, discrimination, and the country's growing insecurity (Groupe URD, 2020).

Existing literature show that the COVID-19 pandemic has resulted in economic challenges like loss of jobs and reduced income for foreign nationals. The severity of the impact on foreign nationals' jobs depended on the host nations' economic conditions and the sector they were employed (Groupe URD, 2020). In Italy, the COVID-19 lockdown resulted in severe economic crises characterised by loss of jobs, reductions in wages, or loss of income (Chowdhury & Chakraborty, 2021). This resulted in the Italian government transferring 400 million euros at the end of March 2020 to all local governments so that they could distribute food vouchers to affected families (Sanfelici, 2021). The municipalities had to develop the criteria for issuing the vouchers and the value. Most local governments issued vouchers to local citizens and foreigners with residence permits which excluded undocumented foreign nationals (Sanfelici, 2021). In this regard, undocumented and precariously employed foreign nationals were severely affected.

The COVID-19 pandemic has also affected remittances which are defined as the money from foreign nationals' earnings in the host countries that they send back to their families in their home countries (European Commission (EC), 2020). These remittances are very useful to foreign nationals' families in their home countries because they are used to pay for costs related to education, household utilities, healthcare, family credits, and starting small businesses (EC, 2020). The COVID-19 pandemic impacted remittance inflows due to situations that foreigners faced in host

countries such as reduced salaries, job losses, and increased household and healthcare costs (Mutekwe 2022).

Strong and weak ties: Towards a theoretical/conceptual framework

This paper used social network theory to understand how foreign nationals managed to cope with COVID-19-induced challenges in SA. Social networks are defined as "sets of interpersonal ties that connect migrants in destination areas through ties of kinship, friendship, and shared community origin" (Massey et al., 1994, p. 728). These networks consist of strong ties and weak ties. Strong ties exist among family members and friends while weak ties exist between colleagues and people from the same ethnic group (Granovetter, 1973). The network view looks at the web of relationships in which actors are part that can offer or constrain opportunities. Migrants use information from friends, colleagues, kinsmen, and family when traveling to other countries (Landau & Duponchel, 2011). These networks are important because friends and family furnish migrants with valuable resources such as money, accommodation, information on work and visas, and moral support (Hofmann, 2015).

Social networks can provide a variety of support such as emotional, informational, and instrumental or practical support (Ryan et al., 2008). Migrants can get support from a variety of people and through different relationships. For example, they can get emotional support from strong ties among partners, family members, and close friends (Friberg, 2012). Weak ties often provide informational support through colleagues, neighbors, and connections outside of one's close associates (Friberg, 2012). In social network theory, "the actor is a subject in different networks which he or she uses rationally to maximise utility" (Elrick, 2005, p. 2). The social network theory suggests that kin and friendship ties reduce migration's social and financial costs (Massey et al., 1993). Social networks also contribute to the initial stages of migrants' integration (Caputo & Gidley, 2013).

Granovetter (1973) opines that weak ties are important compared to strong ties because they offer migrants opportunities and useful knowledge in coping with and overcoming challenges related to migrating to a new setting. More so, weak ties are important in that they connect migrants with the host society, enabling migrants to adapt and integrate easily into the host societies (Granovetter, 1973). A study on migrants' social networks and their negotiation of the city of Johannesburg discovered that strong ties were more useful than weak ties (Jean, 2008). This paper focused on both weak and strong ties to ascertain how these social networks have enabled foreign nationals to cope with the COVID-19 challenges in SA. In this paper, strong ties include foreigner's family members and friends while weak ties are foreign national's colleagues, fellow foreign nationals, locals, and Civil Society Organisations (CSOs).

The literature reviewed in this section showed that foreigners faced several challenges during the pandemic and that in some contexts, government measures cushioned foreign migrants from COVID-19-related challenges, while in other countries the measures were exclusionary. It is within these instances where the measures were exclusionary that social networks played an important role in enabling foreign nationals to cope with COVID-19 shocks. The literature reviewed here does a good job of listing challenges faced by foreign nationals and the government relief measures given to foreigners while in cases where the government neglected foreign

nationals, it does not explain the coping mechanisms they employed. More so, the literature is silent on the role social networks played in helping migrants cope with COVID-19-induced challenges. Therefore, this study closed these gaps by focusing on challenges faced by foreign nationals in SA and the role social networks played in helping them to cope with these challenges.

METHODOLOGY

This paper adopted a qualitative methodology to study the challenges and coping mechanisms of foreign nationals during the COVID-19 pandemic in SA. The paper employed phenomenology which 'is a technique for qualitative research that highlights the commonalities among those with comparable experiences' (Satsatin et al., 2023, p. 20). Since the lockdown rules of social distancing posed challenges to face-to-face methods of gathering data, the paper adopted online data collection methods. This study was conducted from March 2020 - March 2022. Participants were purposefully selected depending on whether they were a foreign national or a local South African member of a CSO that deals with foreign nationals. Interviewed participants were asked to refer the researcher to their family and friends who were suitable to participate in the study. Thus, 16 interviews were conducted and eight were done through Zoom, three through telephone calls, and five through WhatsApp audio calls. The interview medium was chosen depending on the participants' preference and access to a stable internet connection and information communication technology device. The interviews were all conducted in English and transcribed for analysis. The researcher transcribed some of the interviews especially those from key participants while some were transcribed with the help of a professional transcriber. The table below sums up the profiles of the participants interviewed.

NAME	GENDER	NATIONALITY and/or ORGANISATION	PROVINCE
Melody	Female	SA Lawyers for Human Rights	Gauteng
Tafadzwa	Male	Cameroonian	Western Cape
Lucy	Female	SA Landless People's Movement	Western Cape
Moses	Male	Malawian	Gauteng
Tabani	Male	SA SA Makause Community Development Forum	Gauteng
Kudzai	Male	Zimbabwean	Gauteng
Palesa	Female	Mozambican	Gauteng
Thoko	Female	SA Global South Against Xenophobia	Western Cape
Marcia	Female	Zimbabweans in SA	Gauteng
Lloyd	Male	Zimbabwean	Western Cape
Rumbidzai	Female	SA Voice of Azania	Western Cape
Thabile	Female	Zimbabwean	Gauteng
Marlon	Male	Zimbabwean	Gauteng
Kagiso	Male	Mozambican	Gauteng
Monica	Female	Kenyan	Gauteng
Musa	Male	Cameroonian	Gauteng

The table above shows that of the 16 participants who were interviewed, five of them were South Africans who are community leaders, one Kenyan, five Zimbabweans, two Cameroonians, one Malawian, and two Mozambicans. Of the 16 participants, eight were females and eight were males while five of them were from the Western Cape and 13 were from the Gauteng provinces.

Data from interviews were supplemented with document analysis of various media publications and academic literature and by attending webinars where issues affecting foreign nationals during the pandemic were discussed. Thus, these various data collection methods helped to triangulate the data which increased the validity of the paper's findings as suggested by Carter et al. (2024). The documents that were analysed in this study were downloaded on Google search using keywords such as the COVID-19 pandemic and foreigners in SA, foreigners in SA and access to food, foreigners in SA, and healthcare services among others. These keywords yielded a variety of data sources that were analysed for themes in this paper.

In this study, analyzing, collecting and triangulation of data were not separate processes because interviews, webinars, and document analysis involved endless critical work that pointed to new questions and gaps that were explored through any of the three data collection methods. This was done in a way that as interviews unfolded, the researcher identified similarities and patterns in participants' storylines and coded them into different theme groups. Some themes would present gaps rather than answers, and the researcher would fill these gaps through document analysis and data from webinars. Additionally, webinars raised interesting issues that the researcher developed further by reviewing documents and literature. The data analysis process followed a thematic analysis procedure as suggested by Braun and Clarke (2011). The study got ethical clearance from the University of Johannesburg Faculty of Humanities Research Ethics Committee. Participants were emailed information sheets before the interview, and they gave their consent verbally which was recorded during the interview. The identities of participants are concealed by using pseudonyms.

FINDINGS AND DISCUSSION

Health challenges faced by migrants: limited access to healthcare facilities in SA

The findings of this paper show that foreign nationals faced challenges of limited access to healthcare services during the pandemic. Restricted access to healthcare facilities among foreign nationals manifested in the form of 'medical xenophobia' - a situation where African migrants are discriminated against in public healthcare facilities because of their nationality (Huisman, 2020). Tafadzwa, a community organizer from the Western Cape, narrated an incident when a Cameroonian who had COVID-19 symptoms struggled to get ambulance services. This was because of his accent; the ambulance services could tell that he was not a South African and chose not to come and help him. To get around this challenge, a local South African called the ambulance and it came which shows the denial of healthcare services to foreign nationals during the pandemic. This also shows how weak ties helped foreign nationals to get around 'medical xenophobia' through the help of locals.

The findings of this paper show that foreign nationals' limited access to healthcare during COVID-19 was evident at the onset of the pandemic through a COVID-19 test form that required a South African ID number, which was exclusionary for foreign

nationals. Dr. Eric Goemaere of Medecins Sans Frontieres (MSF), noted that the COVID-19 testing form asked for an ID number which excluded those without an ID, yet everybody needed to have access to tests if they were symptomatic (Huisman, 2020). Similarly, Melody, who is a member of the Lawyers for Human Rights (LHR) explained that they lobbied against the need for an ID on the test form because it was exclusionary. This shows how social networks (weak ties) in the form of CSOs like MSF and LHR assisted in making sure that migrants accessed healthcare during the pandemic.

This paper's findings show that foreign nationals faced challenges associated with the practicalities of self-isolating especially those who contracted COVID-19. Kudzai explained that when he was infected with COVID-19, he had to move out of his home to protect his wife and two children. Kudzai stayed with his friend who had also tested positive for COVID-19. Similarly, Palesa explained that when her mother tested positive for COVID-19, she was fortunate, that their house had enough rooms that allowed her to self-isolate at home. The quotation below best captures how they navigated her self-isolation.

> *We stay in a three-bedroom, so she had her room where she was able to self-isolate. We use the same toilet, so I would go in and sanitize it all the time. I was the one giving her food and going to buy medication, so we had a proper arrangement for isolation compared to many other people (Palesa, interview, 2021).*

The narratives above highlight how migrants used social networks like friends and family members to manage the challenges of isolation and care. The practicalities of self-isolation explained here refute the experiences of self-isolation for foreign nationals in other parts of the world such as Greece (Amnesty International, 2020), Lebanon, and Uganda (Solidar, 2020). Their conditions were inhumane, overcrowded, and associated with limited or no access to healthcare, which made it difficult to practice basic hygiene and self-isolate (Sanfelici, 2021). This difference between the experiences of foreign nationals in SA and elsewhere can be attributed to the fact that most foreign nationals in the countries listed above were refugees in camps while participants of this study were not. This paper's results show that foreign nationals access to healthcare was worsened by limited access to information and language barriers. The secretary-general of the Somali Community Board of SA, Abdirizak Ali Osman, shared the following regarding the challenge of the language barrier among foreign nationals and access to healthcare services.

In most cases, foreigners and locals do not understand each other's languages, making communication challenging. In healthcare facilities where Indigenous South African languages are spoken, a migrant may find it challenging to communicate with healthcare workers, and this often leads to communication breakdowns that can affect the quality of healthcare received by foreign nationals. I think it is high time that the health department considers employing health workers who can speak foreign languages (Mehlwana, 2021).

This shows that the challenge of access to information was worsened by language barriers for most foreign nationals. However, CSOs like the LHR and African Diaspora Forum attempted to bridge this gap through the Right to Know campaign where they

developed pamphlets translated into numerous languages. Melody was proud that they had done a crucial job that the government failed to do. This finding resonates with what Solidar (2020) who observed that in the UK COVID-19 safety measures messages were not translated into languages understood by non-nationals which resulted in CSOs like Volunteering Matters translating the national safety guidelines into 20 languages for all non-English speaking UK residents. In this way, weak ties were instrumental in ensuring that foreign nationals had access to information on COVID-19. The limitations of accessing healthcare explained here do not resonate with the experiences of foreign nationals in nations such as Portugal, Saudi Arabia, England, Djibouti, Kenya, Sudan, and Uganda who were given free or subsidised access to healthcare during the lockdown (Meer & Villegas, 2020; Groupe URD, 2020; Meghan et al., 2021). However, these experiences align with what foreign nationals in Libya experienced limited access to healthcare services (Groupe URD, 2020).

Foreign nationals and challenges in accessing the vaccine

The findings of this paper show that foreign nationals especially the undocumented ones faced challenges in accessing the COVID-19 vaccine and that CSOs were instrumental in lobbying for access for all. The vaccine rollout strategy in SA expected all people who intended to get vaccinated to register on the National Electronic Vaccination Data System (EVDS). The EVDS created a national COVID-19 vaccination register that assisted with the procurement, timing, and vaccine rollout (Walker et al., 2021). The EVDS required an ID, passport, or permit number and it did not have an option to register anyone without any form of identification (Walker et al., 2021). In this way, the EVDS became a barrier for undocumented foreign nationals to be vaccinated. This need for documents resonates with Bojorquez-Chapela et al. (2023) analysis of Latin American country's national vaccine programs which despite the inclusion of foreign nationals, administrative challenges to the vaccination of undocumented foreign nationals were detected in the form of the need for documents. A good example of this was in Chile where an ID was a requirement to register for vaccination and this excluded foreigners who did not have any ID (Bojorquez-Chapela et al., 2023). The challenges of including foreign nationals may be best explained by the observation of the IOM (2022) that most countries' policies intended to include foreign nationals yet the practicality of it presented challenges that policymakers did not foresaw for some categories of foreign nationals. In this case, the practicalities of vaccinating undocumented foreign nationals seem to not have been considered by many countries.

The contradictory messages from the government at the initial stages of the vaccine rollout on whether undocumented foreign nationals would be vaccinated were a major challenge faced by foreign nationals in SA. For instance, on 30 January 2021, Dr Zweli Mkhize the then minister of health noted that the government had no vaccine plan for undocumented foreigners. On 1 February 2021, in a national address, President Cyril Ramaphosa announced that foreign nationals were to be included in the vaccine rollout. Again, at the end of February 2021, Dr. Mkhize told members of the National Council of Provinces that the government must draw up plans for the vaccination of undocumented foreign nationals. The IOM (2022) noted that some countries avoided publicizing their intentions to include foreign nationals in their vaccination campaigns

for various reasons such as avoiding xenophobic reactions. This might be the reason for the contradictory messages explained here which might have been uttered based on how each official wanted to manage xenophobic reactions, especially in a country like SA where foreign nationals have suffered xenophobic attacks before.

This uncertainty regarding undocumented migrants' vaccination plans resulted in CSOs intervening in addressing this challenge by lobbying for vaccines for all. For instance, on 23 February 2021, LHR, Global South against Xenophobia (GSAX), and the South African Human Rights Defenders Network jointly called on the government to explain how undocumented foreigners were going to be vaccinated (C19 People's, 2021). Tabani a member of the Makause Community Development Forum explained that as an organisation, they were advocating for everyone to be vaccinated irrespective of nationality unless one chose not to. These combined efforts of CSOs resulted in undocumented foreign nationals being vaccinated. For instance, the KwaZulu-Natal Department of Health (DoH) teamed up with the Denis Hurley Centre in Durban to vaccinate undocumented foreign nationals using a person's name and date of birth (Matlhare, 2021). In addition, the Gauteng DoH in partnership with the University of Pretoria, the Johannesburg District Office, Anova, MSF, and Wits Research Health Institute opened pop-up vaccination sites in Johannesburg (Africa News, 2021).

Bojorquez-Chapela et al. (2023) state that the COVID-19 pandemic was a test for the policies of inclusion and health care for foreigners in most countries. Thus, the failure to include foreign nationals in the vaccine rollout strategy timeously shows the loopholes in SA's policies of inclusion especially when looking at foreign nationals. These failures are the foundation upon which social networks in particular weak ties in the form of CSOs lobbied for foreign nationals to access. More so, the failure to explicitly include foreign nationals in the vaccine rollout strategy was not only present in SA but in most Latin American countries like Brazil, Mexico, Colombia, and Peru (Bojorquez-Chapela et al., 2023).

Limited access to government hunger alleviation services

The findings of this paper show that hunger is one of the challenges foreigners faced during the COVID-19 lockdown in SA. The South African government's hunger alleviation programs included the provision of food hampers to affected families including foreign nationals. A South African national ID or a special permit was a prerequisite to receiving food hampers that undocumented foreign nationals did not have which resulted in them failing to get food parcels (New York Post, 2020). This corroborates the experiences of foreigners in other contexts like Italy where food was distributed to Italians and permits holders which excluded undocumented foreign nationals (Sanfelici, 2021). However, in SA, the situation seemed to have been worse since some participants like Lloyd felt that whether one was documented or not did not matter because foreign nationals were not included in the government food hampers. Melody explained that the LHR received a lot of hunger complaints from foreign nationals. She added that they had to locate community leaders of the communities where the affected foreigners resided to intervene, and they would help the affected families. Thoko, a member of the GSAX, explained that their organisation also received calls about hunger and starvation among foreign nationals. The quotation below captures her experiences.

"Even though we did not have money, we did fundraising, we also checked where the Department of Social Development (DSD), NGOs, or charity organisations were providing food, and we put people in touch with them. We did this for non-locals like women in rural areas, and we got calls of people having fainted in the streets. What troubled me was that the government was not making available the information that its resources were open to non-locals. So we developed good relationships with the DSD, particularly here in the Western Cape. The head of the DSD is a fantastic individual, he has been very responsive, and everybody who has been referred to him has ensured that they have been checked up on et cetera. I cannot say the same for other Departments" (Thoko, interview, 2020).

Marcia a leader of an organization called Zimbabweans in SA explained that as an organisation they had to source food for affected families, and the C19 People's Coalition was one of the most helpful organisations. The C19 People's Coalition helped them with food items like vegetables, mealie meals, and soups among others. Marcia noted that community leaders were xenophobic towards foreigners when it came to issuing food hampers because they required a South African ID to register people. Marcia lamented that when she sourced food for foreigners, community leaders who had discriminated against foreigners from accessing government food hampers were again fighting to get that food. Tabani explained that his community's hunger alleviation initiatives included foreign nationals, and the quotation below best captures his community's position on migrants.

"When you touch on the issue of the migrants whom no one assisted, and they were excluded in many of those government schemes. So that was the position that the organization played to make sure that we covered especially those that were excluded. As an organisation, we are anti-xenophobic in whatever we do; there is no discrimination, and we are accommodating everyone" (Tabani, interview, 2021).

Tabani explained that they stay in an informal settlement such that they know each other hence; it was easy to locate beneficiaries for food hampers. He elaborated that they established volunteers who identified beneficiaries in all three sections of their informal settlement. They categorised beneficiaries to be prioritised as the elderly, the sick, pregnant, and single women raising kids on their own. He explained that if a foreign national fell into any group that would be benefiting, they would help that person. This highlights that social networks in the form of CSOs were useful in ameliorating the challenge of hunger during the pandemic. Furthermore, Marlon, a Zimbabwean student who researched the impact of COVID-19 on self-employed foreigners in Johannesburg explained that from the ten people he interviewed; only one person received a food voucher. Some of his participants did not bother to apply for food hampers because they felt that the government was not going to cater to them based on their previous bad experiences when accessing government benefits. Some of Marlon's participants got food parcels from their employers while a car guard told him that when the lockdown started, his regular clients contributed money and bought groceries for him.

This paper's results also show how the pandemic resulted in forged unity and networks among nationalities. For example, Zimbabweans managed to unite and mobilize resources using social media groups like 'Zimbabweans in Cape Town' and helped each other to buy food and pay rent (Jacobsen & Simpson, 2020). Similarly, a quotation below from Musa on the initiatives they did as foreign nationals to help other Cameroonians shows how unity was forged around nationalities.

> *"So what we did was that monthly those of us who were fortunate to have a salary identified those who needed some necessities like groceries, and we split up among ourselves. We did this for about six months in 2020. Then as soon as the economy opened a bit, we stopped, but we were able to support some of our brothers and sisters for a while" (Musa, interview, 2021).*

The findings of this paper show that foreign nationals who were suffering from hunger got help from churches. This idea of churches stepping in to help during COVID-19 blends well with Ngcobo and Mashau, (2022, p. 4) who noted that 'the church in every locality must make efforts to serve as a change agency'. Thus, churches served well in as much as this call is located by making means to help those affected. For instance, Tafadzwa explained that he contacted Catholic churches in Cape Town and Woodstock which he is a member, and they assisted by giving them food weekly. Tafadzwa also got help from his networks as captured below.

> *"I also have Muslim friends who got me some food which was for 30 people. Then there was this international migrant organisation, which also tried to organize, seeing the difficulties that foreign nationals were suffering. They had to mobilize and get a voucher for R700 for migrant families to go to the shop and get some food. There were soup kitchens where some migrants could go and get food" (Tafadzwa, interview, 2020).*

Furthermore, just like churches in Cape Town, churches in Johannesburg also helped foreign nationals during the pandemic. Thabile a student from Zimbabwe explained that when the lockdown started in 2020 her church in Melville Johannesburg gave students food parcels up until November 2020. Similarly, Monica a student from Kenya also got support from her church which had migrant support programs where she was given money to buy food. This finding corroborates what the Parkridge Church in Florida USA did, where it partnered with Christian organisations to help people affected by COVID-19 (Bevill, 2021). The accounts given here show that migrants faced challenges in accessing government food hampers and both strong and weak ties were instrumental in coping with food insecurity since some got help from employers and church members.

SOCIOECONOMIC CHALLENGES

Loss of employment and reduced income

This paper's findings show that loss of employment and reduced income are some of the challenges faced by foreign nationals in SA. These challenges were worsened by the barriers they faced in accessing government relief measures. The government introduced several measures to cushion people from the socio-economic impacts of the lockdown measures. These measures included the COVID-19 SRDG of R350, 350

million Business Relief Fund (BRF), increased child and social support grants, tax subsidies for individuals and small businesses, and reduced UIF payments (Mukumbang et al., 2020). Findings show that while local South Africans accessed their UIF, foreign nationals struggled to get theirs, yet they were formally employed and paid UIF contributions before the pandemic (Mutewe, 2022; Jobson et al., 2021). Foreign nations were not paid their UIF because the UIF system did not accept passport numbers (Business Insider SA, 2020). More so, the SRDG grant was available to local citizens, holders of permanent residency, and those with refugee status. When applying for the grant a South African ID number was needed. For those who had refugee status and had not received their refugee ID, the South African Social Security Agency had to generate a temporary unique 13-digit ID for them (Scalabrini Centre of Cape Town, 2020). These relief measures excluded undocumented foreign nationals who did not have an ID, asylum, or special permits. Therefore, foreign nationals who lost their employment or had reduced income due to COVID-19 could not access the abovementioned relief measures because of the exclusionary bureaucratic requirements.

The paper's findings show that it was against the backdrop of the above-mentioned challenges in accessing government relief measures that foreign nationals' social networks became their means of survival. Marlon shared a story of a Zimbabwean car guard who earned nearly R2000 a month before the lockdown, who lost his source of income during the COVID-19 lockdown, and asked his church member to employ him as a gardener. He added that this church member gave him the job as a gardener for a month, and then employed him as a loader in his warehouse since he runs a medium-sized company. This shows that unlike Micro Small and Medium-Sized Enterprises in Indonesia which experienced several obstacles with some failing to continue business operations (Hanifan & Dhewanto, 2022; Cornelis & Febriansyah, 2023), some in SA managed to survive and helped people who had lost their sources of income. The loss of jobs and income of foreign nationals can be best explained by the fact that they work in precarious low-wage sectors where they are usually the first ones to lose their jobs in times of crisis (Jones et al., 2021). Moses is one of the foreign nationals who lost their jobs because of the COVID-19 pandemic. He explained that after losing his job in October 2020, he relocated from Cape Town to Johannesburg to stay in his parents' house. While Moses lost his job, he explained that he used some of his retrenchment package to help his cousin who had also lost her job. The quotation below captures how Moses helped her cousin's sister.

> *"I have a cousin who worked as a maid, so she could not work when this thing happened. I had to give her money like R1500 for 3 months to help her sustain herself because she has a kid in high school. It was hard taking out money when I was not earning much money compared to what I used to earn, and my wife was not working" (Moses, interview, 2020).*

Moses' account shows the role played by strong ties in helping foreign nationals cope with COVID-19 challenges. This is deduced in two ways; first by him getting help from his parents who allowed him to stay in their house and secondly by him helping a cousin. Palesas' account is like Moses' narrative because when her mother lost her job their family in Mozambique assisted them. Palesa noted that, even though

they had lost their mother's source of income they still found ways to help her aunty who worked as a domestic worker and was affected by the lockdown. Moses' and Palesa's accounts are interesting because they show that foreign nationals who were affected by the pandemic still had to find ways to help their relatives who were worse off than them. Similarly, Marlon narrated that when he had financial challenges during the lockdown his siblings assisted him. Monica also faced financial challenges when she lost her job during COVID-19 but was fortunate enough that her Ph.D. supervisor gave her a research job. This shows the utility of Monica's weak ties in her Ph.D. supervisor giving her a job. These accounts reflect that informal work and temporary labour contracts do not provide foreign nationals with financial stability, and the capacity to save money to cushion any income interruptions (Jones et al., 2021).

The impact of the lockdown on remittances

The results of this paper show that the lockdown had negative effects on remittances. This was so because the loss of employment reduced the amount of money foreign nationals could send back home. More so, the closure of borders meant that foreigners could not send groceries and other items across borders. To this end, the StatsSA 2020 report shows that only 18% of foreign nationals could send remittances during the COVID-19 lockdown. However, foreign nationals who could afford to remit during the lockdown could not remit the same amounts they did before the lockdown. More so, some foreign nationals in SA had to receive remittances from their families back home or in other countries. This is deduced from Lloyd who pointed out that foreign nationals struggled to collect monies sent by their relatives from abroad because their documents had expired. This shows that foreign nationals received help from their social networks during the lockdown. Musa explained that most foreign nationals in SA were unable to remit as they used to do before COVID-19. Similarly, Marlon learned that most foreign nationals who are employed informally were unable to remit. Some participants reported that they told their families back home that they were unable to help them while some advised their families to move from the city to the rural areas where the cost of living is cheaper. These accounts show that foreign nationals in SA usually use their earnings to look after their families in their countries of origin and the COVID-19 pandemic affected their ability to continue doing so. The decline in remittances noted here resonates with the general worldwide trend where the pandemic resulted in reduced remittances as noted by the World Bank (2020) cited in Jones et al. (2021) that the overall remittance flows declined in April and May 2020 and partially recovered in June 2020.

The COVID-19 pandemic altered the usual trend where foreign nationals send remittances to their families in their home countries as some of them had to receive money from their families in their home countries. Palesa stated that her mother lost her source of income and their family in Mozambique had to send them money. The issue of foreign nationals receiving remittances was also evident in a story shared by Kagiso about his neighbour from Malawi who lost his job because of COVID-19, and he wanted to go back home. He explained that the person had to ask his uncle from the United Kingdom who helped him with a hundred and forty-five Euros to use to go back to Malawi. This money had to be sent in Kagiso's name since the person was undocumented. These narratives from Palesa and Kagiso show that migrants received

remittances from social networks, and they had to get help from their social networks with documents to access their money. The decision to go back home after losing jobs resonates with the findings of Jones et al. (2021) who noted that many of the migrants they surveyed returned home and gave up their jobs due to COVID-19-related concerns. This underscores the precarious nature of informal sector employment where most foreign nationals are employed without access to healthcare coverage, workplace rights, and social protection (Jones et al., 2021).

CONCLUSION AND RECOMMENDATIONS

This paper has demonstrated the challenges faced by foreign nationals and how their social networks enabled them to cope with COVID-19-induced challenges. The paper has divided the findings into two broad themes namely health, and socio-economic challenges, each with its sub-themes. A trend seems to have evolved in each of the sub-themes on the utility of strong and weak ties. For instance, in the sub-theme on access to health care services migrants have used strong ties while weak ties were instrumental in coping with hunger and starvation. Loss of employment and income is the only sub-theme where migrants have made use of both strong and weak ties, while the sub-theme on remittances shows the utility of strong ties. Granovetter (1973) argues that weak ties are more important than strong ties because they offer migrants opportunities and useful knowledge to cope with challenges in their host countries and they connect them with the host society, enabling them to adapt and integrate easily. However, contrary to Granovetter's view this paper has found both strong and weak ties to have been useful in making sure that foreign nationals cope with COVID-19 challenges in SA.

The challenges that participants in this paper faced in accessing government services show the need for the government to ensure that in the future everyone irrespective of their nationality and legal status in the country can access public services, especially during state emergencies. This can be done by eradicating bureaucratic and administrative barriers such as the need for ID numbers. Given the role that CSOs played in helping foreign nationals as highlighted in this paper, the government should seek to work with CSOs when it comes to ensuring that foreign nationals access government services. This paper's findings on ‘medical xenophobia’ and discrimination underscore the need to capacitate civil servants on policy changes and to hold them accountable for unconstitutional acts and human rights violations.

Findings of this paper have revealed the resilience and adaptability of foreign nationals in mitigating the COVID-19 crisis while highlighting the vulnerabilities that persisted among foreign nationals before the pandemic, during the pandemic, and in the post-pandemic period. The findings of this paper provide valuable insights for policymakers, humanitarian organizations, and stakeholders working toward inclusive recovery strategies. This paper's findings underscore the need for a holistic approach to addressing inequalities that have been magnified by the pandemic, ensuring that foreign nationals are not left behind in government policies. The findings of this paper contribute to a deeper understanding of the intersection between migration, inequality, and public health crises, offering practical recommendations for building a more equitable society. By addressing these ongoing issues, this paper provides actionable insights for addressing inequalities and vulnerabilities that have been exacerbated or

newly revealed by the COVID-19 crisis. This paper's findings highlight the necessity of forward-looking policies that address both immediate recovery needs and systemic inequities to foster sustainable development in a post-pandemic world.

LIMITATIONS AND FUTURE RESEARCH RECOMMENDATIONS

This paper had methodological limitations associated with participants' lack of or limited access to broadband internet and information communication technology devices. This was a major challenge given that the study was conducted at the peak of the pandemic when lockdown rules prohibited face-to-face interviews such that online and telephonic interviews became the only available options. In addition, unlike Zoom, WhatsApp and telephone calls do not currently offer the ability to record sessions securely. Instead, they require the use of third-party providers. As such, the researcher had to use his mobile phone to record and store sessions. The other limitation of online and telephonic interviews was the difficulty of connecting with the participants, owing to the lack of face-to-face communication. These limitations combined made it impossible for the researcher to understand participants' moods and to capture non-verbal cues. More so, this might have affected the quality of the data collected. However, the triangulation of data sources might have mediated the combined effects of the abovementioned challenges with online and telephonic data collection methods used in this study.

Given that this study was conducted at the peak of the COVID-19 pandemic when the researcher was forced to abandon face-to-face interviews, there is a need for future studies to be conducted face-to-face to make up for the limitations noted here. More so, future studies can also take stock of whether foreign nationals have managed to recover from the pandemic-related shocks mentioned in this paper. Such studies can also look at the current relationships between migrants and the various social networks they used during the COVID-19 era. Lastly, since this paper only focused on foreign nationals, future studies can be done on local South Africans to draw comparisons between the challenges and coping mechanisms they employed during the pandemic and those of migrants listed in this paper.

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The authors affirm this research did not involve human subjects.

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DIGITAL NOMADS AS POLITICAL FACTOR AND A HYPOTHETICAL POLITICAL ACTOR

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Abstract: Digital nomadism is a relatively recent yet rapidly expanding phenomenon characterized by a form of mobility in which work becomes location-independent and everyday life is organized through continuous movement. As a distinct group within contemporary cross-border migration processes, digital nomads appear not only as objects of state and institutional policies but also display elements of political agency. This article supplements existing multi-level analytical frameworks for studying migration by introducing several conflict-laden themes and proposing a typology that captures the internal heterogeneity of the category commonly identified as "digital nomads." Such heterogeneity reveals differentiated value orientations within neo-nomadic communities and enables preliminary assumptions regarding potential political platforms corresponding to these orientations. Noting the absence of political forces within existing nation-states capable of representing some of these interests, the article explores the possibilities for digital nomads to emerge as political actors through participation in new, network-based forms of organization and self-organization.

Keywords: *digital nomads; mobility; migration; social citizenship; political subjectivity; nomadic identity; sovereignty; freedom; belonging; networked communities*.

Introduction

In recent years, digital nomadism has attracted growing attention from scholars and policymakers. Definitions of the digital nomad vary widely and depend largely on the analytical perspective adopted. Traditionally - if the term "tradition" may be applied here, given that *digital nomad* was coined by Makimoto and Manners in 1997 (Makimoto & Manners, 1997) and that the rapid growth of research on the topic has occurred only within the past decade (Simova, 2023: 180) - the phenomenon has been examined primarily within tourism and leisure studies, as well as in relation to developments in information and communication technologies.

Acknowledging the limitations of these perspectives for understanding digital nomadism, several authors have proposed sociological frameworks situating the phenomenon within migration studies and conceptualizing it as a multi-level

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interaction between structural conditions and individual agency (Dreher & Triandafyllidou, 2025). While research on "reactive" state policies responding to the expansion of digital nomadism has become relatively widespread (Hary & Triandafyllidou, 2025), only a limited number of studies attempt to develop an overarching analytical framework for socio-political analysis. Existing work has focused primarily on the changing relationship between digital nomads and the state (Cook, 2022), which, in turn, necessitates a reconceptualization of social citizenship (Webb, 2024).

Rather than constructing such a comprehensive framework, this article aims to examine several conflict-laden domains in which digital nomads appear not only as objects of external actors' policies, but also as actual or potential political agents. The analysis seeks to systematize possible forms of political expression and institutionalization among nomads. Addressing this research objective requires engagement with several questions:

- *Do shared political values underpin the interests of digital nomads, and how are these values articulated?*
- *Are political structures capable of representing these interests already in place, and if not, on what platforms might they emerge?*
- *What are the sources of threats and opportunities for advancing these interests?*

The analysis begins by considering definitional approaches to digital nomadism that allow the phenomenon to be distinguished from other forms of mobility. It then examines the multi-dimensional interactions that constitute the basis and boundaries of digital nomads' political (proto)subjectivity.

In Search of a Definition for an Elusive Phenomenon

Efforts to delineate digital nomadism from its broader environment remain ongoing. Despite numerous descriptive definitions, a comprehensive conceptualization is still lacking. Scholars commonly identify two observable characteristics of digital nomad activity: cross-border mobility and remote work mediated by digital technologies. At the same time, researchers frequently note the large number of "nomad-like" groups, and existing typologies often clarify who digital nomads *are not* more successfully than who they *are*.

For example, Cook and Simonovsky propose a matrix defining nomadic groups along two dimensions: work-focused versus non-work-focused, and high versus low mobility (Cook, 2020: 357). According to this diagram, individuals identifying as digital nomads typically inhabit the quadrant combining strong work orientation with high mobility. This distinguishes them from backpackers, tourists, non-working elites, and lifestyle expatriates (non-work-focused), as well as from traditional expatriates and business travelers (low mobility). Nevertheless, some frequent business travelers still fall into the same category as digital nomads by these criteria.

Similarly, the boundaries within typologies that differentiate work-related mobility (remote workers, freelancers, traveling professionals) from lifestyle mobility (backpackers, flashpackers, global or neo-nomads) often remain ambiguous (Hannonen, 2020). Distinctions between digital nomads and expatriates, emigrants, and

other mobile groups are likewise blurred, frequently requiring additional criteria to achieve analytical meaningfulness[1].

Some researchers attempt to capture the complexity of digital nomadism by developing detailed operational definitions. Such definitions typically require the combination, or simultaneous enactment of two types of mobility. For example, digital nomads "use digital technologies to work remotely, they have the ability to work and travel simultaneously, have autonomy over frequency and choice of location, and visit at least three locations a year that are not their own or a friend's or family home" (Cook, 2023: 259). In this way, quantitative criteria supplement qualitative ones, which are deemed insufficient for analytical purposes when used alone.

It is noteworthy that, unlike many other definitions, this formulation does not require cross-border movement. Considering whether this element is important for understanding digital nomadism becomes significant in light of the widespread scholarly consensus that nomads' integration into host cultures tends to be low. If this is indeed the case, it seems unlikely that the primary motivation for crossing borders lies in the exploration of cultural differences - although such differences are undoubtedly more accessible through international travel than through domestic mobility. This implies either that cross-border movement is not essential to the core definition of digital nomadism, or that attention should instead be directed toward other motives, such as economic or political. Sociodemographic observations support this line of reasoning: digital nomads disproportionately originate from countries with "strong" passports, which directly facilitate crossing restrictive political borders and indirectly correlate with the economic capacity to travel extensively. More broadly, this raises a question - returned to later in the article - regarding the extent to which digital nomads depend on their ability to leverage meaningful differences between the environments through which they circulate.

Attempts have also been made to derive the digital nomad from the broader category of "nomad." For instance, terminological distinctions have been introduced to differentiate global, neo-, and digital nomads within this broader conceptual space (Hannonen, 2020). These definitions are typically linked to the idea of travel - sometimes described as "drifting" - as a normalized mode of life in which, unlike in tourism, the journey itself takes precedence over the destination (Cohen, 2010). The capacity to sustain oneself while on this journey becomes central. In this sense, digital nomadism has been interpreted as an ideology of a "full life in motion," one premised on the dissolution of the dichotomy between work and leisure. Rather than existing as separate activities, work and leisure are integrated and rendered independent from fixed space and time through the capacity to perform professional and personal activities from virtually any location. The appeal of nomadism is heightened by the claim that self-actualization and personal fulfillment through continuous movement allow individuals to satisfy an existential need to move - *Moveo ergo sum* (Mancinelli & Salazar, 2023). Here, the freedom associated with the figure of the nomad is realized both *in* and *through* mobility.

[1] A partial - though not exhaustive - set of such criteria and assessments, found in the scholarly literature, was presented by the author at the International Conference "Education and Research in the Digital Age Societies " (Yerevan State University, Armenia, November 4-5, 2025)

Understanding mobility as a need suggests that a conceptual definition of nomadism may be approached through typologizing movement according to its desirability and possibility. Movement is always movement *from* and *to*, shaped by the conditions of both departure and destination. A typology could therefore be constructed by defining the desirable and the possible in terms of the relationships individuals maintain with both spaces. Yet is it permissible to temporarily bracket the differences between departure and destination and focus solely on the movement itself? It appears so. Although linguistic and cultural conventions encourage the use of terms such as "home" and verbs such as "leave," "stay," or "return," a more neutral opposition between "movement" and "non-movement" proves analytically advantageous. This framework allows us to describe what may be called a *mobility decision* (Table 1).

For simplicity, let us assume that in the conditional decision "to be or not to be mobile," each alternative - "to initiate movement" (Move, M) or "not to initiate movement" (Not Move, –M) - is characterized by its *possibility* (P) and *desirability* (D), each of which may be either present (1) or absent (0). Additionally, axiom 1 (A1) stipulates that desirability cannot be absent for both alternatives (MD, –MD) simultaneously . At the same time, we provisionally allow desirability to be present for both alternatives - that is, ambivalent desire - on the assumption that such ambivalence may serve as a useful heuristic concept. In practice, this ambivalence ultimately "collapses" into a concrete decision (either {MD1, –MD0} or {MD0, –MD1}) through various evaluative processes, such that desire for movement exceeds (MD > –MD), or falls below (MD < –MD) desire for non-movement, or even equals it, as in the classical dilemma of Buridan's donkey (MD = –MD).

Table 1. Decision regarding mobility

	M		-M		Deci-sion	Interpretation	Ideal Type[2]
#	MP	MD	-MP	-MD			
1	0	0	0	0	(A1)	Does not exist	
2	0	0	0	1	-M	Absence of movement	
3	0	0	1	0	(A1)	Does not exist	
4	0	0	1	1	-M	Absence of movement	
5	0	1	0	0	-M	Absence of movement	
6	0	1	0	1	-M	Absence of movement	
7	0	1	1	0	-M	Absence of movement	
8	0	1	1	1	-M	Absence of movement	
9	1	0	0	0	(A1)	Does not exist	
10	1	0	0	1	M	Undesirable movement due to the absence of the possibility not to move	Exile***
11	1	0	1	0	(A1)	Does not exist	

[2] Note: nomadic (*), semi-nomadic (**), non-nomadic (***) groups.

12	1	0	1	1	-M	Absence of movement due to absence of desire to move	
13	1	1	0	0	M	Desirable movement without the possibility and alternative desire not to move	Rolling Stone*
14	1	1	0	1	M	Desirable movement without the possibility, but with an alternative desire not to move	Escapee**
15	1	1	1	0	M	Desirable movement with the possibility, but with no alternative desire not to move	Wanderer*
16	1	1	1	1	M or -M	Desirable movement with an alternative desire and the possibility not to move, or desirable absence of movement with the possibility and alternative desire to move	Tourist**

We will not comment on all scenarios in the resulting table in which a decision to move is *not* made, and will instead focus on those in which movement *is* chosen. The names of the ideal-typical categories used here are provisional and could certainly be refined; nevertheless, this approach already permits the identification of "nomadic" and "non-nomadic" groups within the mobility space. In our "nomad formula," grounded in the principle *Moveo ergo sum*, the state of "being a nomad" is most likely defined by the combination of three characteristics: the presence of both the possibility and desirability of movement, along with the absence of desirability for non-movement ({MP1, MD1, –MD0}), regardless of the possibility of remaining stationary.

The two categories highlighted in the table - the "Rolling Stone" and the "Wanderer" - both satisfy this condition. Intuitively, one might assume that the "spirit of nomadism" is more vividly expressed in the second case, in which the decision to move is fully detached from external constraints at the point of departure, rather than being driven by the *impossibility* of staying, as in the first case. Conversely, the opposite interpretation is also plausible: one could argue that the Rolling Stone's inability to choose non-movement binds them more reliably and irrevocably to mobility, and is therefore more fundamentally nomadic.

Leaving aside debates over who might qualify as the "truest nomad," it becomes evident that the category of "nomad" is internally differentiated, and that existing empirical research on digital nomadism often uses less stringent criteria than those employed in this model. As a result, the empirical literature often includes the "Tourist," the "Escapee," and occasionally even the "Exile," whereas in our typology the first two ({MP1, MD1, –MD1}) constitute, at most, semi-nomads, and the latter - while common in broader migration flows - is entirely non-nomadic, as it lacks the desirability of movement ({MP1, MD0, –MD1}).

Acknowledging the limitations inherent in this simplified approach, we can nonetheless return from the general definition of the nomad to the more specific category of the digital nomad. In our model, remote work functions as a concrete - and indeed important, though ultimately only one - mechanism for maintaining the "decision to move"; it therefore belongs to the set of "Possibility to Move" [MP]. Yet

is it the only element of this set? The evidence suggests otherwise. Research on digital nomadism identifies numerous factors that extend far beyond the technological feasibility of location- and time-independent work: these include individual professional qualifications, labor-market structures, macroeconomic conditions, visa regimes, passport strength, and broader features of the global political order. While our primary concern here is the structure of the "Possibility to Move," the same wide range of determinants shapes the "Possibility Not to Move," and, indirectly, the corresponding value-oriented desires.

Thus, the opposition between the desirable and the possible in our model may - and indeed should - be interpreted through the dynamics of the internal and the external, the individual and the structural. This interpretation points toward the need for a multi-level framework capturing how interactions among these factors unfold both *within* and *across* analytical levels.

Integrating the Nomad Model into a Model of the World

In one of the studies mentioned in the introduction, the authors creatively adapt the model proposed by Benson and O'Reilly (2018) to analyze interactions between agents and structures in migration processes (Dreher & Triandafyllidou, 2025). Their approach distinguishes three levels of interaction:

1. **The macro-level**, comprising large global and historical systems (such as neoliberalism or postcolonialism);
2. **The meso-level**, encompassing more flexible structures within which policies on digital nomadism are formulated (such as visa regimes); and
3. **The micro-level**, where individual agents, their practices, and their worldviews are situated.

Building on this framework, we further develop the discussion of agent–structure interactions outlined by these authors and introduce additional dimensions that seem equally relevant for reflecting on the political subjectivity of nomads.

Macro-level narratives

Dreher and Triandafyllidou (2025) argue that the principal structural framework shaping the existence of digital nomads is **neoliberalism**, understood as the generator and normalizer of "neoliberal subjectivity." This form of subjectivity prioritizes personal responsibility and assumes that individuals should optimize their lives through rational choice. The outcomes of such choices are interpreted as purely personal achievements or failures, detached from the structural conditions in which they occur. This framing conveniently absolves the state and other collective institutions from responsibility for individual futures. As earlier forms of solidarity erode, individuals are increasingly compelled to become "self-entrepreneurs" in pursuit of their own version of the "good life." Simultaneously, growing instability in employment, income, and career prospects - characteristic of many advanced economies of the Global North - has become a defining factor that, for many, creates an **"impossibility of non-movement."** Despite their privilege in education, financial resources, and citizenship, digital nomads find themselves in circumstances where **geoarbitrage** - a term popularized by Ferriss (2009), referring to the "geographic solution to economic

precarity" through relocation to cheaper destinations - becomes the only viable strategy for preserving a familiar standard of living. Some respondents even describe themselves as **"economic refugees"** (Hayes, 2014: 1961), positioning themselves not as nomadic "Wanderers" but rather shifting toward the semi-nomadic "Escapee" or even the non-nomadic "Exile" categories within our model.

Dreher and Triandafyllidou conclude their macro-level discussion by emphasizing another foundational factor enabling geoarbitrage: the **postcolonial context**, reproduced in the present through vast global inequalities of wealth, power, and status. From this perspective, the question of whether digital nomads could sustain their lifestyle without substantial differences between places of departure and destination must, in most cases, be answered in the negative - at least if freedom and movement remain central structuring values of the phenomenon.

Several additional macro-level factors are also crucial for understanding digital nomadism. While inequality will remain, for the foreseeable future, a key enabling condition for geoarbitrage and thus for the "possibility of movement" available to some (or nominally available to many aspiring) nomads, the broader neoliberal world order - and in particular the ideal of open borders - faces mounting challenges. The COVID-19 pandemic illustrated vividly how "black swan" events can suddenly undermine mobility by prompting widespread border closures. A parallel emerging threat is the normalization of discourses depicting global military conflict as imminent. Such discourses often lead to reduced border permeability for "potential adversaries," mirroring Cold War logics and further jeopardizing the assumptions of free movement upon which many nomadic practices depend.

Another macro-level trend is *the global shift toward autocratization* - a widespread movement toward authoritarianism observable in both 'traditionally' autocratic and 'traditionally' democratic regimes[3]. Within the scope of this text, it is difficult to definitively assess how this trend might threaten the nomadic way of life, although one cannot help but make the ironic observation that both the ideal-typical nomad and the autocrat share at least one formal aspiration: the desire to free themselves from institutional constraints on their individual will. Simultaneously, analyses of pandemic management suggest that 'some democracies have implemented such an extensive range of digital citizen-control technologies that they have become difficult to distinguish from autocracies', often subsequently 'forgetting' to revoke these measures, which were initially justified as temporary and extraordinary (Fedorchenko, 2020:13). The trend toward *tightening control over digital space* has thus become virtually universal, blurring distinctions between regime types and, in the context of growing dependence on digital platforms, challenging one of the key elements of freedom - the freedom to communicate.

The unrealized - but partially plausible - 'The Great Reset' program (Schwab, Malleret, 2020), rather postponed than fully removed from the agenda, highlighted another challenge likely to affect global mobility: the potential radical reduction of the 'desire not to move'. The slogan 'You own nothing, and you are happy,' first voiced in a

[3] V-Dem Institute (2023). Democracy Report 2023. Defiance in the Face of Autocratization. URL: https://www.v-dem.net/documents/29/V-dem_democracyreport2023_lowres.pdf

2016 WEF video[4] as part of an initiative aimed at abolishing or *transforming private property relations*, promoting large-scale deprivatization within the sharing economy, and shifting governance to 'stakeholders' if ever implemented, could, by severing ties with points of origin, multiply the number of potential nomads (though not necessarily their actual 'possibility of movement'). At the same time, similar structural preconditions for the expansion of nomadism already exist today. Among digital nomads, Millennials and Generation Z dominate the age profile[5], whereas accumulated wealth - including a substantial share of residential property - is heavily concentrated among older generations. In the United States - the key 'exporter' of nomads - these two 'most nomadic' generations, constituting more than 35% of the country's population[6], control only about one-tenth of its total net wealth[7].

It is also worth noting that many of these ideas, underlying various *'grand projects'* proposed by global organizations, although often rooted in real and pressing global problems, suggest total regulation of all aspects of human life as a tool for addressing them, in the name of optimizing the use of the planet's shared resources. Regardless of the nature of the motivations for such regulation (though ecological concerns are usually central), it ultimately leads - following the logic of the 'Spaceship Earth' metaphor - to the creation of '*the most total institution* ever known in human history' (Rott, 2024).

It is not difficult to assume that while the challenges outlined above, associated with a potential new fragmentation of the world, may still leave the ideal-typical nomad some (albeit limited and certainly not guaranteed) space to exist, the logical extreme of the opposite trajectory - that is, total institutionalization under a single, universal framework on a global scale - would signify its symbolic and practical demise. However, unlike these more or less distant potentials, real interactions mostly unfold at the next, densest level.

Meso-level narratives

As Dreher and Triandafyllidou note, the principal actors at the meso-level include both states and local formations often referred to as *digital nomadlands*. These are understood not only as communities and locations where nomads establish temporary bases, but also as nodes within a broader mobility network - "a complex set of [concurrent, fluid, and multi-scalar] dynamics … that impact the movement decisions of digital nomads" (Dreher & Triandafyllidou, 2025). While significant scholarly attention is devoted to nomadlands as social hubs - frequently developing their own intermediaries who facilitate interaction between nomads and local communities -

[4] 8 predictions for the world in 2030. URL: https://www.facebook.com/worldeconomicforum/videos/8-predictions-for-the-world-in-2030/10153920524981479/

[5] MBO Partners (2024). Digital_Nomads Report 2024. URL: https://info.mbopartners.com/rs/mbo/images/2024_Digital_Nomads_Report.pdf

[6] US Population by Age 2025. Demographics Stats & Facts. URL: https://theworlddata.com/us-population-by-age/?utm_source=chatgpt.com

[7] UBS (2025). Global Wealth Report 2025. URL: https://elements.visualcapitalist.com/wp-content/uploads/2025/08/global-wealth-report-09072025.pdf

states, in this framework, tend to be reduced to providers of attractive visa schemes and passport policies. Their role is framed largely as the provision of *technical*, rather than *political*, solutions aimed at increasing mobility and attracting temporary residents.

However, for the purposes of our analysis, this one-dimensional portrayal of the state is insufficient. At the meso-level, crucial political narratives emerge, and these cannot be captured by treating the state merely as an administrative mechanism for visa issuance. To address this, it is useful to return to our nomadic model and attribute concrete characteristics to the abstract notion of "non-movement" - specifically, its dual role as both a base (*homebase*) and a country of citizenship (*homeland*). Destination points lack this latter status, creating a fundamental asymmetry between how these two types of political entities perceive nomads: either as *citizens* or as *foreigners*. This distinction has substantial political consequences.

Homeland: Pushing State and Retaining State

Although populations - alongside territory - have traditionally been regarded by states as valuable assets, whose unregulated loss is generally seen as undesirable, history provides numerous examples in which the deliberate outflow of people has functioned as a demographic "pressure valve." Out-migration, in such cases, releases "steam," alleviating social and political tensions within the country of origin. Such processes may reduce unemployment, mitigate discontent, or externalize politically inconvenient groups. Thus, while modern states often publicly frame emigration as a challenge, it may simultaneously operate as a covert strategy for preserving internal stability[8]. Considering the earlier observation that, for a significant share of the digital nomad community, the *impossibility of non-movement* often outweighs the *desire to move*, one may infer that, for many Global North states, the departure of groups perceived as symbolic challengers to dominant social or political values is not a process that policymakers are necessarily inclined to restrict. Moreover, such "push" dynamics frequently unfold almost spontaneously, driven by structural features of the domestic economy and, at times, by internal political conditions. These dynamics require minimal direct state intervention while simultaneously reducing domestic protest potential by enabling dissenting or disillusioned groups to depart.

At the same time, states also possess **retention motives**, which sometimes give rise to hybrid strategies such as "push with retention" (e.g., the U.S. tax system, which subjects citizens to worldwide income taxation regardless of residence) or "push followed by return" (e.g., Peter the Great's decree sending nobles abroad for education, or contemporary Chinese *Thousand Talents* programs). Retention policies often carry an ethical dimension, framing departure as a failure to repay society for its prior investments or as an unfair breach of the social contract, which presumes that individuals owe certain obligations to their homeland and state.

The digital nomad's relationship to their state reflects this same ambivalence. On the one hand, distancing is common: nationality is downplayed, and the nomad

[8] RCIA (2025). Migrations and international security | Migracii i mezhdunarodnaya bezopasnost`: doklad № 101 / 2025 / [pod red. S.M. Gavrilovoj, I.A. Bocharova, A.P. Korzun, D.O. Rastegaeva]; Rossijskij sovet po mezhdunarodny`m delam (RSMD). Moskva: NP RSMD, 2025. (In Rus.) URL: https://russiancouncil.ru/papers/RIAC-Migration-Security-Report101.pdf

foregrounds a cosmopolitan sense of self, treating the state not as a homeland but as a point of origin or a temporary base. Yet this distancing coexists with a continued dependency on the privileges associated with holding a strong passport, which remains fundamental for sustaining mobility.

Furthermore, research has identified cases in which digital nomad communities - despite living highly mobile and ostensibly individualistic lives - develop what might be termed **"tailor-made nationalism"** (Mendelovich, 2025). Here, Bauman's tension between freedom and belonging (Bauman, 2007) is mitigated through diasporic or ethnic structures organized as forms of "club culture," positioning themselves simultaneously against the state that imposes restrictions and against the less mobile segment of their compatriots who accept such constraints.

Homebase: Attracting State and Obstructing State

The relationship between host states and digital nomads is more complex than the technical design of special visa policies might suggest. Mancinelli and Molz (2023) employ the metaphor of **friction** to describe situations in which nomads "leverage state-imposed constraints into creative forms of 'border artistry' that allow them to achieve their lifestyle goals in the shadow of the state." At the same time, states themselves act as "border artists," crafting visa regimes that require mobile individuals to *organize themselves* around characteristics the state finds desirable - self-sufficiency, "consumer citizenship," and depoliticized mobility. In this sense, "mobility regimes emerge as the mutual interface between digital nomads' individual strategies to stay on the move and states' institutional strategies to codify and commodify their legal status" (Mancinelli & Molz, 2023).

Within this dynamic, the concept of **"liquid citizenship"** becomes relevant, operationalized through processes of commodification and confiscation: citizenship can be *purchased* ("economic citizenship"), but it can also be *revoked* - for example, "to prevent citizens from, or punish them for, engaging with "hostile" ideas or groups"[9]. Discourses of 'duty to the homeland' and prohibitions on multiple citizenships for current citizens may coexist with programs of 'citizenship by investment' aimed at prospective citizens.

States not only encourage nomads who have mastered the 'art of borders' *to integrate* into their institutional frameworks, but are also *pressured to respond to social tensions* arising from effects that may be less favorable for local populations. In countries experiencing significant inflows of digital nomads, such as Mexico[10], Spain[11], Thailand[12], and others, mass protests have already occurred against rising

[9] Herregraven, F. (2015). Liquid Citizenship.
URL: https://femkeherregraven.net/liquidcitizenship/
[10] New York Post (2025). Mexico City plans to tackle gentrification after protests.
URL: https://nypost.com/2025/07/19/world-news/mexico-city-plans-to-tackle-gentrification-after-protests-against-mass-tourism/
[11] The Guardian (2023). Barcelona residents protest against 'digital nomads' and gentrification.
URL: https://www.theguardian.com/cities/2023/nov/15/barcelona-residents-protest-digital-nomads-gentrification

living costs, displacement from residential neighborhoods, destruction of cultural heritage due to tourism, and infrastructure developments designed to accommodate newcomers. Digital nomads are often indirectly blamed in these conflicts, seen as symbols of globalization and economic pressure on local populations.

Traditional security discourses also justify obstructing the entry of digital nomads, framing them as potentially "harmful" or "alien" elements. Although such concerns are usually unfounded, the historical embeddedness of the discourse of "protection from migration" remains significant (Dizikes, 2010). Moreover, digital nomads do occasionally participate - symbolically or actively - in local protests when their interests or ideological positions align with local movements.

Interactions between States

States not only compete for digital nomad flows by offering increasingly permissive visa policies, but also cooperate in forms of restriction. For example, intergovernmental agreements on the avoidance of double taxation simultaneously ensure that no individual can avoid taxation altogether.

Finally, with regard to the formation of nomad hubs, these locations are becoming increasingly "overlaid with infrastructure," particularly through intermediary agencies that facilitate newcomers' adaptation, as well as through influencer-driven businesses that "sell" the idea of the nomadic lifestyle. In some cases, even satirical reinterpretations of traditional nomadism emerge, such as agencies organizing group travel for "nomads." These narratives share a common thread: the processes through which the ostensibly emancipatory essence of the nomadic individual becomes intertwined with a complex web of institutional influence and commodification.

Micro-level narratives

Micro-level experiences largely reproduce the same tension between prescribed and actual motivations. The exploration of selfhood coexists with attempts to escape the corporate world; declared opposition to dominant values runs parallel to an embrace of neoliberal discourses of the self - an individual to whom no one owes anything.

At the same time, the literature shows that some nomads maintain a degree of agency within their interactions with surrounding structures. Indirect evidence of a desire to act in the spirit of the "authentic nomad" is provided by the comparatively small number of special visas actually obtained - typically no more than several tens of thousands in the most popular destinations, and only a few hundred or thousand in less frequented states - compared with estimates of **18 million American digital nomads alone**. While this may partly reflect the fact that relatively few nomads meet stringent visa requirements, it also suggests that the practice of *"slipping out of the embrace"* has not disappeared, and that nomadic values continue to serve as a potential foundation for future political solidarity.

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[12] Bangkok Post (2024). Expats and digital nomads face protest backlash in Chiang Mai. URL: https://www.bangkokpost.com/thailand/general/2123456/expats-digital-nomads-face-protest-backlash-in-chiang-mai

(Non-)Nomadic Values and Political Projects

It is important to note that discussions of digital nomad values often rely on self-declarations or values implicitly attributed by researchers. None of the established theoretical frameworks typically applied in comparative value studies (e.g., Hofstede, Schwartz, Inglehart) have been fully applied to digital nomadism in the literature we reviewed. When these frameworks are invoked, researchers tend to examine correlations between national-level values and the number of remote workers (e.g., an inverse relationship with Hofstede's *power distance* and a direct relationship with *indulgence versus restraint*) (Beno, 2021), or they simply attribute to nomads the "average values" associated with Global North countries, such as high *individualism* (Mäkinen, 2024).

The contradictory nature of empirical observations regarding what is usually treated as a single digital nomad community calls for distinguishing **terminal** and **instrumental** values - ends versus means (Rokeach, 1973). Given that "the motivations of digital nomads can be understood as engaging three intersecting forms of freedom: professional, spatial, and personal" (Dreher & Triandafyllidou, 2025), the concept *Moveo ergo sum*, introduced earlier as the core internal value structuring nomadism, may also be understood as an **instrumental** value in the pursuit of one or more of these freedoms.

Moreover, for many mobile individuals in the globalized world, freedom - at least in some of its aspects - may not be an end in itself but a means. As G. Diligenski observes, "demands for freedom and equality stem from the need for individual autonomy," and political freedom or democracy may function primarily as instrumental conditions - a backdrop enabling individuals to "discover and assert individuality outside the socio-political sphere (in business, intellectual or cultural creativity, and in choosing one's occupation and location)" (Diligenskij, 2007: 79). While this interpretation is debatable, it is difficult to contest that many mobile individuals reject not institutionalization *per se*, but particular, unsatisfactory forms of institutionalization. Alongside the previously mentioned example of "networked nationalism," one might consider how vanlifers or RVers organize their everyday lives, sometimes replicating state structures and introducing administrative elements of the very order they ostensibly reject (street nameplates, fees for parking spaces, etc.) (Forget, 2023).

Thus, we must recognize that for many contemporary nomads, the central conflict lies **between freedom and belonging**, and this tension cannot be resolved simply by proclaiming the absence of belonging. In Madison's concept of "existential migration," *home* is not a place but an interaction in which "the sense of home" can potentially emerge anywhere and at any time (Madison, 2006). However, the transition from "nothing is home / home is nowhere" to "everything is home / home is everywhere" is not attainable for everyone. Those who "move to stay" (and who are not nomads in the Deleuze and Guattari sense (Deleuze & Guattari, 2010)) require belonging no less than freedom. For them, the "desire to move" is instrumental to fulfilling the "desire not to move."

This raises a crucial question: **Can existing states offer political programs that accommodate both the internal heterogeneity of nomad-like groups and the nuanced balance between freedom and belonging that each group exhibits?** Are

there political forces willing - and able - to reshape the social contract accordingly? And is such a transformation possible at all?

Reflecting on what such principles might look like, K. Webb argues for a **"division of sovereignty"** into spheres that *can* be detached from territory and those that cannot. In practical terms, this could mean, for example, that territorial taxation of digital nomads would apply only to public goods that require physical presence to be consumed, while social insurance would be decoupled from territoriality and become *portable* across borders through reciprocal systems not bound to any single state (Webb, 2024: 310).

Nevertheless, in practice, nation-states - rather than following the "conventional idea of quid pro quo, where citizens pay taxes and pledge allegiance in exchange for protection and welfare" - continue to pursue strategies aimed at **capturing** depoliticized, high-spending long-term residents and talented professionals. These individuals are attracted primarily through lifestyle conveniences rather than through social support programs (Mancinelli & Molz, 2023). In theory, digital nomads - positioned at the vanguard of global mobility - could play a catalytic role in reimagining citizenship for society as a whole, including its immobile majority. Such a model would avoid both "the jealous reassertion of the [old paradigm of] social citizenship" and its dissolution into "an abandonment of solidarity altogether by bubbles of privilege" (Webb, 2024: 311).

However, at present, neither the political left nor the political right is willing to advance such a project. The left, heavily reliant on state power to secure democratic equality, finds the idea of a "division of sovereignty" unappealing - particularly since equality within borders is often achieved "at the expense of the world's neediest outside those borders, despite cosmopolitan pretensions on other fronts." The right, meanwhile, may champion society against the state on questions of domestic freedom, yet simultaneously promotes nationalized discourses of belonging that exclude those beyond the border (Webb, 2024: 311). As Webb notes, there is some truth to the quip that "the Anglosphere [is] selling out society in the marketplace, and bureaucrats from Brussels to Beijing" leave no room "for society outside state control." For this reason, if any hope exists, it may lie in the **Global South**, which tends to be more community-oriented and less rigidly attached to the sanctity of national borders (Webb, 2024).

If such political programs have not yet matured within states themselves, could they emerge **outside** state boundaries? In a certain sense, they already have. An anecdotal yet illustrative example is the recent statement submitted to the United Nations by a small community known as **DoNonDo**, proposing the creation of a **"State Without a State"** - a multi-territorial, transnational social formation combining elements of a Network State and Decentralized Autonomous Organizations (DAOs)[13]. The organization identifies itself as 'a multi-territorial union of people, machines, robots, AI, and other forms of life into a single community with the purpose of declaring sovereignty and quantum neutrality'[14].

[13] United Nations Notification of State Without a State Formation.
URL: https://social.donondo.com/post/72

[14] State Without a State URL: https://www.statewithoutastate.com/about/

At the same time, a far larger community has formed around the idea and project of the *network state*, which possesses significant economic, intellectual, and even political resources. As envisioned by its initiator, American entrepreneur Balaji Srinivasan, The Network State - built on blockchain technologies - is 'a highly aligned online community with a capacity for collective action that crowdfunds territory around the world and eventually gains diplomatic recognition from pre-existing states' (Srinivasan, 2022).

Despite the seeming utopianism of the idea of recognizing a *non-territorial* formation within the existing concept of sovereignty, the project is often described as a serious *challenge to the nation-state*, as it involves privatizing most of its traditional functions. Moreover, as is claimed, the 'Network State Movement' has already seen tangible success in creating territories where the economic sovereignty of the state is at least partially limited[15]. S. Zizek believes that the real aim and likely outcome of such projects is the replacement of democracy with a form of *techno-monarchy*[16]. L. Ropke calls it *techno-colonialism*[17], and G. Duran suggests that within these frameworks, 'free cities', removed from state regulation, would fall entirely under the control of their corporate owners[18]. Some even argue that we are witnessing the formation of a *'global autocratic alliance'*, where techno-capitalists, either inadvertently or consciously, collaborate with traditional autocracies in nation-states to coordinate an attack on democratic liberalism[19].

If these assessments are accurate, then digital nomads - as the target audience of such competing models - find themselves confronted with a choice between the undeniable control of the **"Empire of Equality"** and the equally pervasive control of the **"Corporation of Freedom."** Yet within the latter scenario, the nomadic *"warrior's path"* and the possibility of political agency remain theoretically accessible. A. Neklessa, drawing on examples such as Musk, Thiel, and other proponents of ideas aligned with *The Network State*, introduces the term **manterpriser** to describe a self-sovereign, corporate individual who embodies resistance to impersonal, bureaucratic institutions (Neklessa, 2018: 84).

At the same time, a **"third path"** is emerging - one that rejects both alternatives and positions *both* as adversaries. For instance, the **Logos** movement, co-founded by J. Hope (co-author of the manifesto *Goodbye, Westphalia…* (Hope & Ludlow, 2025)), declares:

"We are part of a generation sick of big banks, big government, and Big Tech. We are taking power back into our own hands. Our mission is to restore subjectivity, trust,

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[15] Troy, D. (2025). Decoding the "Network State". URL: https://america2.news/decoding-the-network-state/

[16] Zizek, S. Network States? No Thanks! URL: https://slavoj.substack.com/p/network-states-no-thanks

[17] Worst New Trend of 2024: Techno-Colonialism and the Network State Movement. URL: https://gizmodo.com/worst-new-trend-of-2024-techno-colonialism-and-the-network-state-movement-2000525617

[18] Startup City' Groups Say They're Meeting Trump Officials to Push for Deregulated 'Freedom Cities'. URL: https://www.wired.com/story/startup-cities-donald-trump-legislation/

[19] Troy, D. (2025). Decoding the "Network State". URL: https://america2.news/decoding-the-network-state/

and civil power through the provision of tools … [that enable] people to explore and innovatively use decentralized technologies."[20] A movement infused with the spirit of *cyberpunk* and *hacktivism*, emphasizing its *non-elitist* nature, declares its goal to create *'parallel institutions'* and self-governing digital communities based on politically neutral means of ensuring privacy, autonomy, and secure communication, *free from centralized control.*[21]

Conclusion

Agreeing with the position that the figure of the 'authentic nomad' may, under certain conditions, prove to be little more than a superficial trope (Engebrigtsen, 2017:51), we nonetheless do not consider it a non-existent abstraction in the real world. Rather, the issue lies in the fact that in the practice of cross-border mobility, and consequently in the lenses of digital nomadism researchers, *it is less often the 'authentic nomad' that is observed, but other, semi- or non-nomadic groups*. As a result, the 'suspected' digital nomads more frequently follow not an 'uprising' in their individual strategies, but passive adaptation to old forms, and in collective terms - sometimes uncreative borrowing and reproduction of these forms. In this sense, *neither individually nor collectively can digital nomads 'jump over' the structural frameworks of the current world order*, engaging with it opportunistically and exploiting the structural inequalities to their advantage.

The vector of potential and already observable changes in the world order does not substantially broaden the 'actor potential', as the alternatives that are emerging still align with existing power structures, particularly in terms of 'control and accountability'. For now, *'takeover' and 'integration' dominate over 'merging' and 'interaction'* in the ideology of state policies for nomads. This same view of their 'insufficient agency' to negotiate on equal terms is likely also interpreted by the nomadic community as something hidden behind the welcoming gestures in the programs of some new *networked actors*. In other words, although nomads possess *some degree of agency* (and here P. Hanna is absolutely right in asserting that the act of migration itself is always political[22]), especially when creatively utilizing the gaps in mobility restriction regimes, *no political models* fully aligned with the interests of any of the defined groups have yet been developed.

More than a century ago, the poet and thinker Vaja-Pshavela published an essay titled *Cosmopolitanism and Patriotism*, in which he persuasively argued that there is no inherent contradiction between these two concepts. While he considered the independent development of nations as a prerequisite for the advancement of humanity as a whole, he nonetheless emphasized a conception of true cosmopolitanism - not as a denial of belonging or love for one's own nation, but as a complex ethical program that fosters solidarity while respecting national identity. He wrote (Pshavela, 1964: 252-254):

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[20] Pioneering a new era of freedom. URL: https://logos.co/

[21] Logos: A Declaration of Independence in Cyberspace. URL: https://logos.co/manifesto

[22] Khanna P. Digital Nomadism Is a New Form of Activism.
URL: https://medium.com/@PlumiaCountry/digital-nomadism-is-a-new-form-of-activism-parag-khanna-dcf65cf6846b

"Listen to the needs of your country, heed the wisdom of your people, dedicate yourself to their wellbeing, don't hate other nations and don't envy their happiness, don't prevent other nations from achieving their goals. Work towards the day when no one will subjugate your nation and work for its progress until it equals the leading nations of the world".

In this understanding - which acknowledges both the impossibility of *"truly loving ten thousand places simultaneously"* and the rational necessity, for the sake of one's own progress, to *"love humanity as a whole"* - cosmopolitanism could serve as an ideological alternative to both excessive **"protective" nationalism** and all-encompassing **"dissolving" universalism**. Such a framework would likely appeal to the majority of **"semi-nomadic"** participants in migration processes, who, of course, bear little resemblance to the media's flattened, stereotypical figure of a *person without attachment to home*. However, today these individuals have little chance of realizing representation through an existing political party - without such a vehicle, their interests will only be represented if they succeed in creating one themselves.

The small number of **"true nomads,"** on the other hand, are likely less troubled by the absence of political representation. Historically, the desire "to classify and typologize nomads was closely linked with attempts to *"capture"* certain groups of people and bring them under symbolic and material control by the state" (Howarth et al., 2024: 19). Not without irony, we may identify yet another potential manifestation of nomadic subjectivity: the ability **not to be counted or studied**. Against this backdrop, aligning with the previously mentioned alternative of cyberpunk might represent a reasonable political choice for that portion of the nomadic community that does not view its *desire to move* as a temporary transitional phase toward achieving the *desire and ability not to move*.

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STRATEGIC COORDINATION AND POLICY CAPACITY: EXECUTIVE INSTITUTIONS AS DRIVERS OF GOVERNANCE INNOVATION IN ARMENIA

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Abstract: This article examines the transformation of executive institutions in the Republic of Armenia through the lens of political sociology, viewing them not merely as administrative structures but as arenas of struggle for symbolic and material capital, spaces for the reproduction of power relations, and agents of institutional change. Employing Bourdieu's neo-institutional optics, Evans's concept of state autonomy, and Mann's theory of state capacity, the study analyzes the dialectic between formal rules and informal practices in the process of administrative modernization. Particular attention is paid to the sociology of reform actors - the bureaucratic elite, the expert community, and international organizations - and the mechanisms of their interaction in the space of state policy. Empirical analysis reveals a contradiction between the discourse of modernization and practices of patrimonial governance, between the formal rationality of Weberian bureaucracy and personalized networks of influence. The study demonstrates that the success of administrative reforms is determined not by technical solutions but by profound transformations of the habitus of civil servants, the restructuring of power relations within the bureaucratic field, and changes in the symbolic economy of public administration. This analysis connects contemporary sociological frameworks with Armenia's ongoing executive authority reforms, examining how institutional design intersects with political culture and governance capacity in a post-Soviet context.

Keywords: *bureaucratic field, state capacity, institutional isomorphism, symbolic capital, patrimonial governance, state autonomy, agents of change, power relations, Armenia*.

Introduction: A Sociological Perspective on Public Administration

Public administration has traditionally been examined through the prism of formal institutions, constitutional mechanisms, and administrative procedures. However, such a perspective, remaining within the confines of legal and managerial discourses, overlooks a fundamental dimension - the social nature of state institutions. Political sociology offers a different analytical lens, allowing us to see power relations behind formal structures, social practices behind procedures, and habitus and symbolic struggle behind rationality (Bourdieu, 2014; Jessop, 2016).

The state, as Bourdieu argued, represents not simply a set of institutions but a field of struggle for the monopoly on legitimate symbolic violence (Bourdieu & Wacquant,

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1992). Executive power in this perspective emerges not as a neutral technical apparatus for implementing political decisions but as an autonomous actor with its own interests, logic of action, and strategies of reproduction. Bureaucracy possesses specific capital - knowledge of procedures, control over information, and the ability to interpret rules - which converts into influence on the political process (Evans, 1995).

In the post-Soviet context, this issue acquires special acuteness. The legacy of the Soviet management system encompasses not merely formal institutions and procedures but deeply entrenched practices, mental schemas, and models of interaction between state and society. Transforming this legacy requires not only institutional design but a change in what Bourdieu calls habitus - a system of durable dispositions that generate practices and representations (Bourdieu, 2014). Administrative reforms, in this perspective, represent not a technical task but a form of social engineering aimed at transforming power relations and symbolic structures (Grzymala-Busse, 2007; Ledeneva, 2013).

Recent empirical research analyzing Armenian governance from 2000-2024 reveals a complex trajectory of administrative transformation characterized by three distinct phases: the persistence of traditional bureaucratic structures (2000-2008), the attempted adoption of New Public Management principles (2008-2018), and the gradual shift toward Good Governance models following the 2018 Velvet Revolution. Systematic analysis of this period using international governance indices demonstrates measurable progress alongside persistent challenges. Armenia's performance in the UN E-Government Development Index fluctuated between ranks 86-110, while its E-Participation Index ranged from 59-135 during 2010-2022 (United Nations, 2022). In ICT infrastructure, Armenia achieved its strongest results in 2016 and 2022, ranking 61st and 64th respectively, indicating substantial technical capacity despite governance challenges (ITU, 2022).

The experience of the Republic of Armenia is particularly interesting in this regard. As a small post-Soviet state aspiring to European integration, Armenia faces the necessity of simultaneously transforming multiple dimensions of statehood. Moreover, the reform process occurs under conditions of limited state autonomy, where external actors - international organizations, donors, and consultants - play a significant role in defining the agenda and methods of modernization. This generates a specific configuration of power relations where global discourses of managerial rationality meet local practices of personalized governance (Centeno, Kohli & Yashar, 2017; Wedel, 2009).

Armenia's transition from a super-presidential system to a parliamentary republic following the 2015 constitutional reforms created new opportunities and challenges for executive institution development. The 2018 Velvet Revolution further intensified demands for administrative modernization and good governance. These political transformations provide a unique laboratory for examining how formal institutional changes interact with informal practices, how reform narratives compete with established bureaucratic cultures, and how international pressures for modernization encounter domestic political realities (Harutyunyan, 2021; Markarov, 2020).

Theoretical Framework: The State as Field and Practice

The concept of field, developed by Pierre Bourdieu, provides a productive analytical framework for understanding the functioning of state institutions. A field represents a space of objective relations between positions defined by the distribution of specific types of capital (Bourdieu & Wacquant, 1992). In the bureaucratic field, such specific capital consists of administrative expertise, knowledge of procedures, access to information, and the ability to interpret rules. Agents in this field - civil servants of various ranks - struggle for the accumulation and conversion of this capital into other forms: symbolic power, social prestige, and material benefits (Bourdieu, 2014).

A critically important dimension of this struggle involves control over the definition of legitimate forms of practice. Who has the right to determine what counts as competence? Which forms of knowledge are recognized as relevant for decision-making? Which procedures are considered proper? These questions are not resolved by technical means but are the subject of symbolic struggle between different factions of the bureaucracy - technocrats and political appointees, 'reformers' and 'conservatives,' specialists from different professional jurisdictions (DiMaggio & Powell, 1983).

In the post-Soviet context, the structure of the bureaucratic field is marked by specific characteristics. The Soviet legacy left a tradition of 'double knowledge' - official, explicit knowledge and informal, implicit knowledge. Formal rules coexist with informal practices of circumventing them; official procedures are supplemented by personal connections and patron-client relations. This creates a dual structure of capital where success is determined not only by possession of formal expertise but also by the ability to navigate informal networks (Ledeneva, 2013; Hale, 2015).

Recent scholarship on post-Soviet bureaucracies emphasizes the persistence of informal governance mechanisms even as formal institutions are modernized (Gans-Morse, 2022; Radnitz, 2021). This duality creates what Gel'man (2021) terms 'bad governance traps' - self-reinforcing patterns where informal practices undermine formal institutional reforms, while weak formal institutions perpetuate reliance on informal mechanisms. Understanding this dialectic is essential for analyzing Armenian executive institutions, where Soviet-era administrative culture encounters contemporary reform pressures.

State Autonomy and Embedded Autonomy

The concept of state autonomy, developed within neo-Weberian political sociology, emphasizes the capacity of state institutions to act independently of immediate pressure from social groups (Evans, 1995). However, as Peter Evans demonstrates, productive autonomy is not absolute but 'embedded' - a combination of institutional independence with rootedness in social networks that provide access to information and channels for policy implementation (Evans, 1995; Evans & Rauch, 1999).

Applied to executive institutions, this means the necessity of balancing bureaucratic rationality with political responsiveness, adherence to procedures with adaptability, and professional expertise with understanding of social context. The problematic nature of this balance becomes especially apparent in situations of administrative reform, when old mechanisms of embeddedness are destroyed while new ones have not yet formed.

There arises a risk of either excessive autonomy, turning bureaucracy into a closed caste, or its instrumentalization by political actors (Migdal, 2001; Fukuyama, 2013).

In the Armenian context, the question of executive power autonomy is complicated by the legacy of hypertrophied presidential rule, where bureaucracy traditionally functioned as an instrument of presidential power, deprived of substantial autonomy. The parliamentarization of the governance system following constitutional reforms created opportunities for strengthening the autonomy of executive institutions; however, the realization of this possibility encounters persistent practices of personalized control and distrust of bureaucratic independence (Asatryan, 2019; Danielyan & Minasyan, 2020).

Contemporary governance research emphasizes the importance of 'relational state capacity' - the ability of state institutions to form productive partnerships with societal actors while maintaining autonomy (Soifer & Hau, 2022; Giraudy et al., 2021). This framework is particularly relevant for Armenia, where the state must simultaneously build capacity, establish legitimacy, and navigate between domestic political demands and international reform pressures. The challenge lies in developing what Cingolani (2021) terms 'quality state capacity' - not merely technical administrative capability but the ability to generate public value and maintain democratic accountability.

State Capacity: Infrastructural and Despotic Power

Michael Mann proposed a distinction between two forms of state power - the despotic ability of elites to make decisions without institutionalized negotiation with social groups, and infrastructural power as the state's capacity to penetrate society and implement political decisions throughout the territory (Mann, 2012). This distinction is critically important for understanding the limitations of public administration in the post-Soviet space.

Post-Soviet states are often characterized by asymmetry between these two forms of power. Relatively high despotic power - the political elite's ability to make decisions - is combined with weak infrastructural power - limited capacity to implement them. Bureaucracy possesses formal authority but lacks the resources, competencies, and legitimacy for their effective use. Moreover, under conditions of societal distrust in state institutions, infrastructural power encounters passive or active resistance (Tilly, 1992; Hanson & Kopstein, 1997).

Strategic coordination and policy capacity, which are the focus of this study, represent precisely elements of infrastructural state power. They determine the ability of state institutions not simply to declare goals but to mobilize resources, coordinate the actions of multiple actors, adapt to changing conditions, and achieve desired results. Developing these elements requires not merely administrative reforms but fundamental transformation of relations between state and society (Soifer, 2023; Berwick & Christia, 2018). Recent scholarship emphasizes that infrastructural power development is path-dependent and deeply shaped by historical legacies, making Armenia's Soviet inheritance particularly consequential for contemporary reform efforts (Lee & Zhang, 2022).

The Sociology of Administrative Reform Actors: Bureaucratic Elite and the Paradox of Reform

A Three-Level Framework for Analyzing Executive Power Effectiveness

While the sociological concepts discussed above illuminate power dynamics within bureaucratic fields, analyzing governance effectiveness requires a systematic multi-dimensional approach. This study employs a three-level analytical framework that integrates institutional, strategic, and operational dimensions.

The Institutional Level examines the formal architecture of executive power, including constitutional arrangements, separation of powers mechanisms, and the legal framework governing bureaucratic autonomy. In Armenia's case, the 2015 constitutional reforms fundamentally altered institutional configurations by transitioning from a super-presidential to a parliamentary system, creating new opportunities and challenges for executive institution development (Harutyunyan, 2021). However, empirical analysis reveals that formal institutional changes have encountered implementation challenges, with the principle of separation of powers facing practical obstacles related to informal influence mechanisms and political interference (Asatryan, 2019).

The Strategic Level focuses on policy coordination capacity, strategic planning systems, and the mechanisms for translating long-term objectives into coherent policy programs. Here, the gap between formal strategic documents and actual implementation becomes particularly evident. Armenia possesses numerous government programs, sectoral strategies, and action plans developed with international expert participation, yet their connection to budgetary processes and operational decision-making remains weak (Galstyan & Hakobyan, 2021). Strategic planning often functions parallel to real decision-making, which is determined by short-term political considerations rather than systematic long-term planning (Harutyunyan, 2023).

The Operational Level addresses the concrete tools and mechanisms through which executive institutions deliver services and implement policies, including digital governance platforms, monitoring systems, and administrative procedures. This dimension has shown the most measurable progress in Armenia. The development of e-governance infrastructure, reflected in international rankings, demonstrates significant technical advancement. Analysis of Armenia's performance shows improvement in specific areas: the country achieved ranks of 61-64 in ICT infrastructure development in 2016 and 2022 respectively (United Nations, 2022). However, operational effectiveness remains constrained by incomplete integration of information systems, limited coverage of digital services across all government functions, and gaps in digital literacy among both civil servants and citizens

The interaction between these three levels is crucial. Institutional reforms create enabling conditions but require strategic capacity to translate into coherent programs and operational capability to achieve tangible results. Conversely, operational improvements (such as e-governance tools) cannot fully realize their potential without supporting strategic frameworks and institutional guarantees of autonomy and accountability. This systemic interdependence explains why fragmented reforms targeting individual levels yield limited outcomes - a pattern evident in Armenia's

reform trajectory where progress at the operational level has not been matched by comparable advancement in strategic coordination or institutional consolidation.

Administrative reforms represent a paradoxical enterprise: they are carried out by the very bureaucrats whose practices and privileges are subject to transformation. This paradox points to a fundamental problem of reform agency. Who is the subject of administrative modernization? Does there exist within bureaucracy a faction interested in changes that potentially limit its discretionary power and call into question established practices? (Thelen, 2004; Mahoney & Thelen, 2010).

Sociological analysis reveals the heterogeneity of the bureaucratic elite and the existence of different factions with competing visions of the desired future. One can identify 'technocrat-reformers' - typically younger specialists with Western education, oriented toward international standards and modern managerial practices. Their symbolic capital is based on possession of expert knowledge and connections with the international community. They see reforms as an opportunity to strengthen their positions against traditional bureaucracy, whose capital is based on knowledge of informal rules and personal connections (Campbell & Pedersen, 2001; Berman, 1997).

Opposing them are 'conservatives' or, more precisely, carriers of traditional bureaucratic habitus, whose practices and identity were formed under different institutional conditions. For them, reforms represent a threat of devaluation of their capital - that knowledge and those skills that ensured their position in the bureaucratic field. Resistance to reforms often takes the form not of open opposition but of more subtle practices - selective implementation, formal adherence to the letter while ignoring the spirit, sabotage through procedural delays (Scott, 1998; Lipsky, 2010).

It is important to understand that this division is not absolute and not static. There exists a significant 'gray zone' of bureaucrats whose positions depend on specific context and the balance of forces. Moreover, even those who sincerely support the idea of reforms may in practice reproduce old behavior patterns - not out of malice but because habitus, being a system of durable dispositions, changes more slowly than formal rules. This creates the phenomenon of institutional isomorphism described by DiMaggio and Powell (1983), when organizations adopt the form of new institutions without changing the content of practices.

Recent research on public sector reform emphasizes the importance of 'reform coalitions' - cross-cutting alliances that bridge bureaucratic, political, and civil society actors (Andrews et al., 2017; Pritchett et al., 2023). In Armenia, the formation of such coalitions has been hindered by weak civil service professionalization, high turnover following political transitions, and limited horizontal coordination mechanisms. The 2018 Velvet Revolution created momentum for reform, but sustaining it requires building institutional mechanisms that outlast individual reform champions (Mirzoyan, 2022; Galstyan & Hakobyan, 2021).

International Organizations as Agents of Transfer

International organizations play a critically important role in processes of administrative modernization in post-Soviet states - the World Bank, European Union, OECD, various technical assistance programs. They function not simply as sources of financing or technical expertise but as agents of transfer of institutional models and managerial discourses. This process is far from neutral transmission of 'best practices'

but represents a form of symbolic domination, the imposition of a particular vision of proper governance (Meyer & Rowan, 1977; Campbell & Pedersen, 2001).

The mechanisms of this transfer are manifold. Conditionality of financial assistance, where reforms of a certain type become prerequisites for receiving resources. Training programs and internships that socialize national elites in the logic of international organizations. Expert missions and assessments that legitimize certain approaches and delegitimize alternatives. All this forms what can be called a 'global field of administrative reforms,' where positions are determined by proximity to or distance from 'international standards' (Wedel, 2009; Stone, 2020).

However, the transfer process is not unidirectional. Local actors do not simply passively accept external models but actively interpret them, adapt them, and sometimes instrumentalize them to achieve their own goals. The rhetoric of reforms can be used to legitimize changes that serve the interests of certain elite factions. 'European standards' become a discursive resource in the struggle for power within the bureaucratic field. What emerges can be called 'strategic mimicry' - the creation of external attributes of reforms while preserving essential practices (Kelley & Simmons, 2020; Schimmelfennig & Scholtz, 2008).

In Armenia's case, the EU's Comprehensive and Enhanced Partnership Agreement (CEPA) and various World Bank governance programs have significantly shaped the reform agenda. However, as Delcour and Wolczuk (2021) observe, such external influences often produce 'selective adaptation' - domestic actors adopt reforms that serve their interests while resisting those that challenge existing power structures. The challenge for Armenia is developing what Börzel and Risse (2012) call 'transformative power' - the capacity to internalize international norms rather than merely comply formally with external requirements.

Expert Communities and the Production of Knowledge about the State

A third important actor is the expert community - researchers, consultants, think tank analysts. They occupy a specific position at the intersection of academic, political, and bureaucratic fields, producing knowledge about the state that claims scientific objectivity but is inevitably embedded in power relations. Experts do not simply describe the reality of public administration but actively construct it through categories of analysis, measurement indicators, and recommendations for reform (Desrosières, 1998; Porter, 1995).

What Foucault called 'power-knowledge' emerges - the inseparable connection between the production of knowledge and the exercise of power (Foucault, 2007). Defining what counts as 'good governance,' which indicators are used to measure it, which problems are recognized as priorities - all these are acts of power, masked by technical and scientific language. International indices and ratings evaluating governance quality function not simply as measurement tools but as mechanisms of disciplining states, forming normative pressure toward conformity with a particular model (Broome & Quirk, 2015; Davis et al., 2012).

In the Armenian context, the expert community remains relatively fragmented. There exists a gap between academic researchers, often detached from practical management problems, and practicing consultants, whose work is determined by donor orders.

Institutional mechanisms for systematic interaction between experts and decision-makers are absent. Expertise is often perceived as a formal requirement necessary for legitimizing already-made decisions rather than as a resource for their justification (Asatryan & Hakhverdyan, 2020).

The rise of evidence-based policymaking discourse globally has increased demands for policy analysis capacity, yet Armenia faces challenges in developing this capacity. As Parkhurst (2017) and Cairney (2021) argue, technical expertise alone is insufficient - effective knowledge utilization requires political commitment, institutional mechanisms for evidence uptake, and what Weible and Cairney (2023) term 'knowledge brokerage' - intermediaries who can translate research findings into policy-relevant insights. Building such capacity in Armenia requires not just training analysts but creating institutional cultures that value evidence in decision-making.

Discourse and Practices: The Dialectic of Modernization

The Expert Brain Drain and Loss of Local Context

A particularly acute manifestation of the dynamics between international organizations and national expertise is what can be termed the expert brain drain - not in the traditional sense of physical emigration, but as a form of cognitive and institutional displacement. National experts who become integrated into international organizations, whether as permanent staff or long-term consultants, often undergo a gradual but profound transformation in their professional orientation, epistemological frameworks, and ultimately, their loyalties (Stone, 2020; Wedel, 2009).

This process operates through several interconnected mechanisms. First, socialization into international organizational cultures reshapes how experts perceive problems and solutions. The World Bank, UNDP, or EU bureaucracies have distinctive ways of framing governance challenges - emphasizing particular metrics, privileging certain types of evidence, valorizing specific reform models. National experts, to succeed within these institutions, must internalize these frameworks, gradually adopting the conceptual vocabulary and analytical templates of the organization (Broome & Quirk, 2015). What begins as strategic code-switching - speaking the language of the organization to secure resources or influence - becomes cognitive assimilation, as the international framework displaces local knowledge structures (Mosse, 2005; Apthorpe, 2011).

Second, career incentives systematically favor international over local agendas. Advancement within international organizations depends on demonstrating alignment with organizational priorities, producing outputs that fit standardized formats (logical frameworks, results matrices, standardized indicators), and avoiding positions that might be perceived as parochial or resistant to 'best practices.' National experts who maintain strong local embeddedness and advocate for context-specific approaches that deviate from organizational templates risk being perceived as difficult, unsophisticated, or captured by local interests (Mosse, 2011; Wedel, 2009). The reward structure thus incentivizes what can be called strategic de-contextualization - the deliberate minimization of local specificity in favor of internationally legible formulations (Scott, 1998).

Stage	Professional Orientation	Primary Loyalty	Knowledge Base
Stage 1: National Expert	Domestic policy context	National institutions	Local tacit knowledge, networks, political economy
Stage 2: Initial Contact	Bilingual (local + international)	Divided loyalties	Learning international frameworks
Stage 3: Regular Consultant	Increasingly international	Career advancement focus	Strategic code-switching
Stage 4: Full Integration	International development discourse	Organizational priorities	International templates dominate
Stage 5: Cognitive Displacement	Global best practices	International agenda	Loss of local context

Table 1. The Expert Brain Drain Trajectory: Progressive transformation from local embeddedness to cognitive displacement

Mechanism	Process	Armenian Manifestation	Consequence
Socialization into International Cultures	Adoption of organizational frameworks, metrics, and priorities; gradual internalization of international discourse	Armenian experts frame problems as "governance gaps" and "European alignment" rather than power relations and distributional conflicts	Policy recommendations technically sound but politically naive; disconnect from implementation realities
Career Incentive Structures	Advancement requires alignment with organizational priorities; context-specific approaches seen as "parochial"	Experts produce standardized deliverables (logical frameworks, results matrices) detached from Armenian institutional realities	Strategic de-contextualization; minimization of local specificity for international legibility
Structural Dependency Creation	Best national experts absorbed by international organizations; domestic capacity erodes	Armenian ministries cannot match international salaries; qualified analysts leave public service	Government becomes dependent on external expertise; cycle reinforces international framework hegemony

Table 2. Mechanisms of Expert Brain Drain in Armenia: Key processes, manifestations, and consequences.

In the Armenian context, this dynamic manifests in several observable patterns. National experts who join international organizations or become regular consultants for donor programs often exhibit progressive detachment from domestic policy debates. They continue to work on Armenia-related projects, but increasingly frame problems through the lens of international development discourse rather than domestic political economy. Issues are analyzed in terms of 'governance indicators,' 'institutional capacity gaps,' and 'alignment with European standards' rather than the concrete power relations, distributional conflicts, and historical legacies that shape Armenian governance.

Empirical research on Armenian reform processes reveals that expert recommendations often exhibit striking disconnect from implementation realities. Strategic documents and policy frameworks developed with international expert participation frequently propose reforms that are technically sound from a managerial perspective but politically naive, failing to account for the informal power structures, resource constraints, and institutional cultures that determine actual implementation (Asatryan & Hakhverdyan, 2020). This is not simply a matter of 'technical' versus 'political' knowledge, but reflects the fact that internationally-oriented experts increasingly lack the tacit knowledge, network awareness, and contextual understanding necessary for effective reform design (Mosse, 2005).

Moreover, the brain drain operates as a structural mechanism reinforcing dependency. As the most capable national experts are absorbed into international organizations, domestic policy capacity erodes. Ministries and government agencies struggle to retain qualified analysts who can match the salaries and prestige offered by international organizations. This creates a cycle where domestic institutions become increasingly dependent on external expertise, which further reinforces the hegemony of international frameworks and the marginalization of locally-grounded knowledge (Mkandawire, 2014; Wedel, 2009).

Addressing this requires not simply retaining experts domestically (often impossible given salary differentials) but creating institutional mechanisms that preserve local embeddedness even as experts engage internationally. This might include: rotating assignments that prevent permanent detachment from domestic institutions; requiring sustained engagement with local academic and policy communities as a condition of international consulting work; developing domestic peer review and validation processes that critically assess internationally-derived recommendations; and strengthening domestic research and policy analysis capacity sufficiently to provide credible alternative framings to international templates (Pritchett et al., 2023; Andrews et al., 2017). The goal is not isolation from international knowledge but avoiding the cognitive colonization that occurs when international frameworks fully displace local analytical capacity.

Rationality and its Boundaries

The discourse of administrative reforms in Armenia, as in many post-Soviet states, is permeated with rhetoric of rationality, efficiency, and modernization. It appeals to the Weberian model of rational bureaucracy characterized by impersonality of procedures, meritocracy, and professionalism. This rhetoric creates a normative horizon against which the existing state of affairs is evaluated and reform goals are formulated.

However, sociological analysis reveals complex relations between this discourse and actual practices (Graeber, 2015; Soss et al., 2011).

First, the very concept of rationality turns out to be culturally specific and historically conditioned. What appears rational from the standpoint of Western administrative tradition may not be so in a different social context. Personal connections, patron-client relations, informal agreements - all this can be viewed not as deviations from rationality but as alternative forms of rationality adapted to conditions of institutional uncertainty and low trust in formal procedures (Ledeneva, 2013; Hale, 2015).

Moreover, the imposition of formal rationality without transformation of the social conditions in which it must function can lead to paradoxical results. Formal procedures intended to ensure impersonality and transparency become resources for manipulation. Documentation and reporting requirements generate 'bureaucratic theater' - the production of formal documents detached from real processes. Control mechanisms create incentives for gaming with numbers and indicators instead of real improvement of results (Scott, 1998; Muller, 2018).

Recent scholarship on 'performing the state' highlights how formal compliance can mask substantive non-implementation (Teets & Hurst, 2020; Tsai, 2021). In Armenia, this manifests in what can be termed 'reform simulation' - the adoption of strategies, creation of agencies, and proclamation of reforms that exist primarily on paper. This pattern is not unique to Armenia but represents a broader challenge in contexts where external reform pressures encounter weak domestic implementation capacity and limited political commitment (Pritchett et al., 2023; Andrews et al., 2017).

Strategic Coordination as Social Practice

Strategic coordination, viewed from the position of political sociology, represents not a technical process of harmonizing plans and actions but a complex social practice involving negotiations, compromises, and coalition formation. It unfolds in a space structured by power relations, where different ministries and agencies possess unequal resources and different symbolic capital. Coordination requires not simply formal mechanisms but trust, a common language, and shared understanding of problems (Fukuyama, 2013; Christensen & Lægreid, 2007).

In the post-Soviet context, the problem of coordination is complicated by the legacy of the Soviet system, where coordination was carried out through party structures and personal connections of the nomenklatura. The abolition of these mechanisms created a vacuum that was not filled with effective alternatives. Formal coordination structures - interagency commissions, working groups - often function formally, serving rather to legitimize decisions than their actual development. Real coordination occurs through informal channels and personal contacts, which makes it opaque and dependent on specific persons (Ledeneva, 2013; Wedel, 2009).

A special role in the process of strategic coordination is played by what can be called the 'center of government' - the prime minister's office, the chancellery, and other structures attached to the head of executive power. These structures claim the role of neutral coordinator standing above sectoral interests. However, sociological analysis reveals that they themselves are actors in the bureaucratic field, possessing their own interests and strategies. Their coordination capabilities depend not only on formal

powers but on symbolic capital - authority, expertise, proximity to political leadership (Alessandro et al., 2021; Dahlström et al., 2020).

In Armenia, the Government Administration has undergone significant reforms aimed at strengthening its coordinating capacity. However, effectiveness remains limited by high staff turnover, weak analytical capacity, and tensions between political leadership and permanent civil servants. International experience suggests that effective center-of-government institutions require both technical capacity and political authority - what Lindvall and Teorell (2022) term 'administrative capacity coupled with political clout.' Building such capacity in Armenia requires not just structural reforms but cultural change in how coordination is understood and practiced across government.

Policy Capacity: Knowledge and Power

Policy capacity in a sociological perspective is connected to the question of types of knowledge recognized as legitimate in decision-making processes. Which forms of expertise are considered relevant? Whose knowledge carries weight in policy discussions? These questions are not resolved by epistemological criteria but reflect power relations within and around the state apparatus. Different types of professional knowledge - legal, economic, engineering, sociological - compete for recognition of their relevance and ability to define problems and solutions (Desrosières, 1998; Porter, 1995).

In the post-Soviet space, this competition is marked by the dominance of legal formalism and distrust of social sciences. Problems are defined predominantly in legal terms - as questions of legislative regulation rather than social relations. Economic knowledge is recognized in the form of neoclassical economics, while institutional and political economy remain marginal. Sociological knowledge, if used at all, is predominantly in the form of public opinion surveys reduced to percentages of support (Aslund, 2013; Wilson & Popova, 2019).

Developing policy capacity requires not simply hiring qualified analysts or creating research units but transforming the epistemic culture of public administration. This includes recognizing the multiplicity of relevant forms of knowledge, creating spaces for dialogue between different expertises, and developing the ability to reflect on the limitations of each type of knowledge. Critically important is also overcoming the gap between knowledge production and its utilization - situations where analytical materials are produced for formal compliance with requirements but do not influence real decisions (Craft & Howlett, 2013; Wellstead et al., 2023).

Armenia's attempts to strengthen policy analysis capacity face multiple challenges. Ministry analytical units often lack autonomy and resources, with analysts subordinated to political pressures and short-term demands. The broader ecosystem - think tanks, universities, research institutes - remains underdeveloped and poorly connected to government. As Wu et al. (2022) observe, effective policy capacity requires not just individual analytical skills but institutional frameworks that support evidence use, including leadership commitment, organizational cultures valuing analysis, and mechanisms for knowledge exchange between producers and users of policy research.

Trajectories of Transformation: Between Isomorphism and Innovation

Institutional Isomorphism and Its Mechanisms

The theory of institutional isomorphism, developed by DiMaggio and Powell (1983), offers an explanation for why organizations in similar institutional fields become alike, even when this does not lead to increased efficiency. Applied to administrative reforms, this means a tendency to copy forms and structures recognized as legitimate in global governance discourse, regardless of their correspondence to local context. Three mechanisms of isomorphism are distinguished: coercive, mimetic, and normative.

Coercive isomorphism manifests through pressure from international organizations, conditionality of financial assistance, and requirements of European integration. States are forced to adopt certain institutional forms not because they are convinced of their effectiveness but because it is necessary for obtaining resources or legitimacy. Mimetic isomorphism arises under conditions of uncertainty, when organizations copy practices of others perceived as successful. Normative isomorphism is connected with professionalization, when carriers of certain education and professional socialization bring similar practices into different contexts (Meyer & Rowan, 1977; Campbell & Pedersen, 2001).

In the Armenian case, all three mechanisms can be observed in action. Adoption of development strategies, creation of agencies according to certain models, implementation of management tools - all this often occurs under the influence of external actors. At the same time, formal adoption of institutions is not accompanied by their real institutionalization - embedding in practices, formation of corresponding competencies, change of culture. The phenomenon of 'façade institutions' emerges, existing on paper but not functioning in reality (Schimmelfennig & Sedelmeier, 2020; Börzel & Schimmelfennig, 2022).

Habitus and the Possibility of Transformation

The persistence of old practices despite formal institutional changes points to a deeper problem - the durability of habitus. Habitus, according to Bourdieu (2014), represents a system of durable dispositions acquired through socialization that generate practices and representations. It functions as a 'structured structure' (product of past experience) and 'structuring structure' (generating current practices). Changing habitus is a lengthy process requiring not simply cognitive learning of new rules but deep resocialization.

For bureaucrats socialized in the Soviet or post-Soviet management system, certain practices - personalization of relations, hierarchical communication, formalism - are natural, self-evident. They are reproduced not by conscious choice or rational calculation but because they represent habitus, which Bourdieu describes as 'history turned into nature.' Transforming this habitus requires not just training in new procedures but changing fundamental schemas of perception and evaluation (Bourdieu & Wacquant, 1992).

At the same time, the concept of habitus does not presuppose complete determinism. Bourdieu emphasizes its adaptive character - the ability to change under the influence of new experience, especially in situations of structural crisis when old schemas cease to work. Administrative reforms, especially radical ones, create such situations of crisis, opening possibilities for transformation. However, this possibility is

realized only under certain conditions - the presence of alternative models, support for changes, time for new experience (Emirbayer & Johnson, 2008; Swartz, 2013).

Recent scholarship on institutional change emphasizes the importance of 'critical junctures' - moments when structural constraints are loosened, creating opportunities for path-breaking reforms (Capoccia & Kelemen, 2007; Soifer, 2012). Armenia's 2018 Velvet Revolution represented such a critical juncture, yet translating revolutionary momentum into sustained institutional transformation has proven difficult. As Slater and Simmons (2013) observe, critical junctures create possibilities but do not determine outcomes - agency, coalition-building, and sequential decision-making shape whether windows of opportunity are realized or squandered.

Empirical Dimensions: Contradictions of Modernization in Armenia: Dissonance Between Discourse and Practice

Empirical analysis of administrative reforms in Armenia reveals a significant gap between official modernization discourse and real management practices. This gap manifests at multiple levels. At the document level - between ambitious development strategies and limited resources for their implementation. At the institutional level - between formally created structures and their real functioning. At the practice level - between declared principles of meritocracy, transparency, and professionalism and persisting patron-client relations, nepotism, and personalization of management (Asatryan, 2019; Danielyan & Minasyan, 2020).

This dissonance should not be interpreted simplistically - as elite hypocrisy or inability to reform. Rather, it reflects a fundamental contradiction in the transformation process, when new institutional forms are superimposed on durable social structures and practices. Civil servants may sincerely support the idea of reforms but act according to logic embedded in their habitus. Political leaders may promote modernization but depend on patronage networks for mobilizing political support (Markarov, 2020; Mirzoyan, 2022).

This contradiction is especially vivid in the area of strategic planning. Formally, Armenia possesses a developed system of strategic documents - government programs, sectoral strategies, action plans. These documents are developed with participation of international experts, use modern terminology and instruments. However, their connection with the real budgetary process and operational decisions remains weak. Strategic planning functions parallel to real decision-making, which is determined by short-term political considerations and crisis response (Galstyan & Hakobyan, 2021; Harutyunyan, 2023).

Patrimonial Practices in Modern Forms

Measuring Reform Progress: Evidence from International Indices

While the dissonance between discourse and practice represents a fundamental challenge, systematic measurement using international governance indicators provides empirical evidence of both progress and persistent gaps in Armenia's administrative modernization.

E-Government Development: Armenia's trajectory in the UN E-Government Development Index (EGDI) reveals uneven progress. Over 2010-2024, Armenia’s

EGDI (E-Government Development Index) score in 2024 is reported as ≈ 0.8422, placing it 48th out of 193 countries. In 2022, Armenia's EGDI ranking was 64th. According to the UN data center, earlier values (for example 2022) show Armenia's EGDI value as 0.7136 (rank 68) and 0.5944 (rank 87) in prior years (United Nations, 2024). This volatility reflects both domestic reform dynamics and rapid advancement of other countries, creating a 'moving target' effect.

E-Participation and Citizen Engagement.

According to the UN E-Government Survey 2024, Armenia demonstrates uneven progress in e-participation: while the country has significantly advanced in the Online Service Index (OSI), its performance in the E-Participation Index continues to fluctuate widely. Over the past decade, Armenia's rank has ranged from the mid-50s to above 130, and in 2024 it remains notably lower than its overall EGDI position. This persistent volatility indicates that, despite substantial improvements in technical infrastructure and digital service provision, institutionalized mechanisms for citizen involvement - consultation, co-creation, participatory policy design - are still underdeveloped and often depend on ad hoc governmental or donor-driven initiatives rather than stable administrative routines (United Nations, 2024).

ICT Infrastructure.

In contrast, Armenia's performance in ICT infrastructure remains comparatively strong. As shown by ITU and UN metrics, the country has maintained solid rankings - 61st in 2016 and 64th in 2022 - reflecting high internet penetration, a dynamic technology sector, and a relatively favorable digital connectivity environment (ITU, 2022; United Nations, 2022). The 2024 findings confirm this trajectory: Armenia's Telecommunications Infrastructure Index (TII) continues to exceed regional averages, providing a stable operational foundation for digital government expansion.

World Bank Governance Indicators.

Cross-comparison with the 2023 Worldwide Governance Indicators reveals similar structural patterns: incremental improvements in regulatory quality coexist with persistent weaknesses in government effectiveness and control of corruption (World Bank, 2023).

These governance gaps reinforce the sociological perspective that formal modernization of institutions does not automatically generate high-quality administrative performance.

E-Participation and Citizen Engagement: The E-Participation Index shows greater volatility, with Armenia ranking between 59th and 135th during the same period (United Nations, 2022). This suggests that while technical infrastructure has advanced, systematic mechanisms for citizen participation remain underdeveloped and dependent on specific initiatives rather than institutionalized practices.

ICT Infrastructure: Armenia's strongest performance appears in ICT infrastructure, achieving ranks of 61st (2016) and 64th (2022) globally (ITU, 2022; United Nations, 2022). This reflects Armenia's robust technology sector and high internet penetration, providing a solid technical basis for digital government services.

World Bank Governance Indicators: Analysis reveals similar patterns - moderate progress in regulatory quality alongside persistent challenges in government effectiveness and control of corruption (World Bank, 2023). These indicators corroborate the sociological analysis, suggesting formal institutional reforms have not yet translated into consistently high governance performance.

This empirical evidence supports the theoretical argument that effectiveness requires simultaneous improvement across institutional, strategic, and operational dimensions. Armenia's relatively strong performance in operational indicators (ICT) combined with weaker strategic performance (e-participation) illustrates the limitations of fragmented reform approaches.

The concept of neopatrimonialism, developed for analyzing post-colonial states, proves productive for the post-Soviet context as well. Neopatrimonialism is characterized by coexistence of formal rational-legal institutions with informal patrimonial practices. State positions are used not only for performing public functions but also for accumulating private goods. Personal connections and loyalty play a key role in career advancement and resource distribution alongside or instead of formal criteria of competence (Hale, 2015; Gel'man, 2021).

In the Armenian context, neopatrimonial practices do not disappear with formal adoption of modern institutions but adapt, taking new forms. Appointments to key positions are formally carried out through competitive procedures but are really determined by personal connections and political loyalty. State resources are distributed through formal tender procedures, but outcomes are often predetermined. Control mechanisms exist but are selectively applied depending on political conjuncture (Asatryan & Hakhverdyan, 2020; Danielyan, 2022).

It is important to understand that these practices are not simply remnants of the past or results of insufficient modernization. They perform certain functions in the context of weak formal institutions and low trust. Personal connections compensate for the unreliability of formal procedures. Patronage networks ensure loyalty and coordination where formal mechanisms do not work. Moreover, for many actors these practices appear not as deviation from the norm but as the norm itself - the natural way the state functions (Ledeneva, 2013; Radnitz, 2021).

Conclusion: Prospects for Transformation

Public Demand, Societal Preferences, and the Ambivalence of Reform Support

A critical but often-elided question in analyses of administrative reform concerns the actual preferences and demands of society regarding governance. Technocratic reform discourse typically assumes a latent demand for 'good governance' - transparency, meritocracy, rule-following - that is suppressed only by elite resistance and institutional inertia. This assumption deserves critical scrutiny, particularly in contexts where informal networks, personalized exchange, and selective rule application have historically provided essential functions for navigating institutional uncertainty and resource scarcity (Ledeneva, 2013; Hale, 2015).

The relationship between Armenian society and governance reform is characterized by profound ambivalence rather than straightforward support or opposition. Survey data reveals this complexity. On one hand, polls consistently show high levels of

dissatisfaction with government performance, widespread perception of corruption, and stated support for reforms (Caucasus Barometer, 2021; World Values Survey, 2022). The 2018 Velvet Revolution demonstrated genuine popular mobilization around demands for clean government, rule of law, and institutional accountability (Harutyunyan, 2021; Markarov, 2020). This provides evidence of authentic societal demand for governance transformation.

However, behavioral evidence and ethnographic research reveal more complex patterns. The same citizens who express abstract support for meritocracy and transparency frequently engage in and expect personalized treatment, network-based access, and informal problem-solving. When faced with bureaucratic obstacles - obtaining permits, accessing public services, navigating regulatory requirements - citizens routinely mobilize personal connections (tanish, blat) rather than relying on formal procedures (Ledeneva, 2013). This is not simply elite corruption imposed on unwilling citizens, but a participatory system of reciprocal obligations in which significant portions of society are complicit beneficiaries (Hale, 2015).

Dimension	Stated Preference	Actual Behavior/Reality	Interpretation
Trust in Institutions	Express dissatisfaction with government performance; support anti-corruption	Only 15-25% trust government institutions; 70%+ rely on personal networks (Caucasus Barometer 2021)	Abstract support for reform but practical reliance on informal systems
Reform Support	High stated support for transparency, meritocracy, rule of law (post-2018 Revolution)	Conditional support; declines when reforms threaten discretionary authority benefiting them personally	Support rhetorical; resistance when reforms have personal costs
Network Reliance	Acknowledge corruption problems	Routinely mobilize personal connections (tanish, blat) for permits, services, problem-solving	Participatory system of reciprocal obligations with broad complicity
Generational Divide	Younger/educated: stronger support for formalization	Older/rural/lower SES: greater attachment to personalized networks (WVS 2022)	Reform coalitions possible but not universal; significant segments prefer status quo
Risk Aversion	Want "better governance"	"Who will help us if not our connections?" - anxiety about losing informal buffers	Fear of reform uncertainty; familiar inefficiency preferred to unknown formalization

Table 3. Public Preferences on Governance in Armenia: Evidence of ambivalence between stated preferences and actual behavior (Caucasus Barometer 2021, World Values Survey 2022).

Institution/Mechanism	Trust Level	Actual Reliance
Government Institutions	15-25%	Low (when alternatives exist)
Parliament	~20%	Low
Courts/Legal System	~25%	Low (avoid when possible)
Family Networks	>90%	Very High (primary problem-solving)
Personal Connections (tanish)	>70%	Very High (routine use)

Table 4. The Trust-Reliance Paradox: Gap between trust in formal institutions and reliance on informal networks (Caucasus Barometer 2021).

Available data from Armenia suggests several patterns:

- Trust asymmetry: Armenians report significantly higher trust in personal networks than in formal institutions. Caucasus Barometer data (2021) shows that while only 15-25% express trust in government institutions, over 70% report relying on family and personal networks for problem-solving.
- Conditional reform support: Support for anti-corruption measures and institutional reforms is highest in abstract formulation but declines when specific implications are made concrete. Citizens support prosecuting 'corrupt officials' but resist reforms that would eliminate discretionary authority that might benefit them personally.
- Class and generational divides: Younger, more educated, and urban populations show stronger consistent support for formalized, rule-based governance, while older generations and those in rural areas or with lower socioeconomic status exhibit greater attachment to personalized, network-based systems (World Values Survey, 2022;)
- Risk aversion and uncertainty: Focus group research reveals that even those critical of current systems express anxiety about reforms that might eliminate familiar (if inefficient) mechanisms without guaranteeing functional alternatives. The question 'who will help us if not our connections?' reflects genuine concern about navigating bureaucratic systems without informal buffers.
- This ambivalence has profound implications for reform sustainability. If significant portions of society benefit from or depend on informal governance mechanisms, reforms that threaten these systems may encounter not just elite resistance but also popular ambivalence or passive obstruction. Citizens may support reform rhetorically while continuing to participate in and perpetuate informal practices, creating the 'simulation' dynamic discussed earlier (Gel'man, 2021).

This creates a fundamental political dilemma for reformers. Formal rationalization and rule-based governance, while potentially more efficient and equitable in aggregate, may impose short-term costs and uncertainties on populations that have adapted to informal systems. Personalized governance, while inefficient and distributionally arbitrary, provides flexibility and responsiveness that rigid formal systems often lack - particularly for those lacking resources, education, or institutional access (Scott, 1998; Migdal, 2001).

A realistic reform strategy must therefore acknowledge this complexity rather than assuming automatic societal support for formalization. This might involve several elements:

- Sequential reform: Prioritizing reforms that deliver tangible benefits to broad populations (e.g., digital services that actually work, simplified procedures, reduced processing times) before tackling entrenched systems that, while problematic, provide essential navigation tools for citizens (Pritchett et al., 2023).
- Functional substitution: Developing formal systems that genuinely substitute for informal mechanisms rather than simply prohibiting informal practices while failing to provide workable alternatives. If personal connections exist because formal systems are dysfunctional, improving formal functionality must precede delegitimizing informal practices (Andrews et al., 2017).
- Coalition-building: Identifying and mobilizing constituencies who would clearly benefit from formalization - typically younger, urban, educated populations who operate more effectively in rule-based systems and are excluded from traditional networks. The 2018 revolution demonstrated such coalitions' potential power (Harutyunyan, 2021).
- Transparency about tradeoffs: Honest public communication about the transition costs of reform - acknowledging that formalization may reduce flexibility and personal discretion while (eventually) improving equity and efficiency - rather than presenting reform as costless improvement (Pritchett et al., 2023).

Ultimately, sustainable governance reform requires not just technical capacity or elite commitment, but genuine societal demand for formalized, rule-based governance even when this entails surrendering the advantages of personalized systems. Whether such demand exists or can be cultivated in Armenia remains an open empirical question requiring ongoing research and careful political judgment. The evidence suggests neither simple opposition nor unambiguous support, but rather complex, context-dependent preferences that effective reform strategies must navigate rather than assume away.

The conducted analysis allows us to rethink the nature of administrative reforms and conditions of their success through the lens of political sociology. The key conclusion is that public administration effectiveness cannot be achieved through simple borrowing of institutional forms or implementation of managerial technologies. It requires profound transformation of social relations, power structures, and actor habitus. Administrative reforms in this perspective represent not a technical project but a form of social transformation fraught with conflicts, resistance, and uncertainty of outcome (Thelen, 2004; Streeck & Thelen, 2005).

Armenia's experience illustrates typical challenges of post-Soviet transformation. Formal adoption of new institutions does not guarantee their real institutionalization. Modernization discourse coexists with durable practices of patrimonial governance. External pressure for reforms encounters internal resistance and adaptation. Global governance models interact with local social structures, generating hybrid forms that do not fit ideal types (Grzymala-Busse, 2007; Ledeneva, 2013).

At the same time, this analysis should not lead to pessimism or fatalism. The sociological perspective, while emphasizing the durability of social structures and

practices, simultaneously indicates mechanisms of their transformation. Changing habitus is possible through new experience and resocialization. Power relations can be restructured through formation of new coalitions and mobilization of alternative resources. The symbolic economy of public administration is transformed through changing criteria of legitimacy and prestige (Bourdieu, 2014; Emirbayer & Johnson, 2008).

The question of reform temporality has critical significance. Transformation of social practices and habitus is a lengthy process requiring generational change. Expectation of quick results, characteristic of administrative reform discourse, does not correspond to sociological realities of institutional change. This creates the risk of disappointment and abandonment of reforms in the absence of immediate improvements. A more realistic understanding of transformation trajectory is necessary, recognizing the inevitability of transitional forms and hybrid configurations (Mahoney & Thelen, 2010; Capoccia & Kelemen, 2007).

Strategic coordination and policy capacity, analyzed in this study, represent not simply technical dimensions of state capacity but indicators of deeper transformations. The ability for strategic coordination reflects the degree of overcoming fragmentation of the bureaucratic field and formation of shared understanding of state goals. Development of policy capacity testifies to changing epistemic culture of governance and recognition of expert knowledge legitimacy. Progress in these areas is possible but requires a comprehensive approach accounting for sociological realities of state institutions (Fukuyama, 2013; Alessandro et al., 2021).

Promising directions for further research include more detailed analysis of micro-practices of public administration, study of career trajectories of different bureaucrat generations, analysis of discursive strategies of reform legitimization, and investigation of digital technologies' role in transforming power relations. An important direction is also comparative analysis of post-Soviet transformation trajectories, allowing identification of both general patterns and specific factors determining differences in outcomes (Grzymala-Busse, 2007; Gel'man, 2021; Hanson & Kopstein, 1997).

Ultimately, the question of public administration effectiveness is a question of the state's ability to be not simply an apparatus of coercion or administration but an institution legitimate in society's eyes, capable of learning and adaptation, oriented toward public good. Achieving this requires not technocratic solutions but democratization of the governance process itself - expansion of participation, strengthening of accountability, development of a public sphere where state practices can be subject to open discussion and criticism. It is in this direction that the path to genuine modernization of public administration lies, overcoming limitations of both traditional bureaucracy and neoliberal managerialism (Jessop, 2016; Sassen, 2014).

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THE GENDERED CONSTRUCTION OF LEADERSHIP AND FOLLOWERSHIP IN ARMENIA'S EDUCATIONAL SYSTEM

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Abstract: This article analyzes the gendered construction of leadership and followership within Armenia's educational system, drawing on theoretical frameworks from gender studies and qualitative fieldwork conducted in public schools. Despite the heavy feminization of the teaching profession, authority and leadership in Armenian society remain culturally coded as masculine, producing a structural paradox in which women educators hold formal instructional authority yet encounter symbolic devaluation. Empirical findings from interviews and classroom observations show that these gendered expectations shape how authority is interpreted and enacted, particularly in male students' varied acceptance or resistance to women as legitimate knowledge holders. The study demonstrates that gendered cultural norms continue to structure leader–follower relations in educational contexts and argues for a more critical engagement with how institutional practices reproduce or challenge patriarchal assumptions. The study contributes to scholarship on gender and educational leadership by demonstrating how cultural schemas and institutional norms continue to influence authority relations within Armenian schools.

Keywords: *archetypes, collective unconsciousness, critical frame, education, followership, gender, leadership, stereotypes*.

Introduction

This study examines the gendered construction of leadership and followership within Armenia's educational system through a combined theoretical and in-field analysis. Drawing on gender theory, sociology of education, and empirical classroom observations, the research explores how occupational segregation and socially constructed expectations shape authority relations between teachers and students. Although teaching in Armenia is a heavily feminized profession - dominated by women across primary and secondary levels - leadership, authority, and public decision-making remain culturally coded as masculine domains (Ishkanian, 2003). This disjuncture produces a structural paradox: women hold formal leadership roles as educators, yet their authority is symbolically devalued within a broader patriarchal context, where masculine leadership continues to be associated with legitimacy, strength, and public visibility (Connell, 1995; Bourdieu, 1991).

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Field data indicate that this contradiction generates tensions in the classroom, particularly in how male students perceive, negotiate, or resist female authority. Teaching is socially framed as "women's work," tied to caregiving and emotional labor, whereas authoritative leadership is linked to traditionally masculine traits such as decisiveness and control (Eagly & Carli, 2007). These conflicting cultural schemas shape the dynamics of leader–follower interactions, influencing student engagement, classroom behavior, and recognition of women teachers as legitimate knowledge holders. The study contributes to a deeper understanding of how gendered norms continue to shape educational leadership in Armenia, highlighting the complex interplay between cultural expectations, institutional structures, and the everyday practices through which authority is enacted and negotiated within schools.

Conceptual Framework of Leadership and Followership

Leadership has been widely theorized across disciplines, yet foundational definitions consistently underscore its core functions: the exercise of influence, the coordination of people and processes, and the pursuit of shared goals. Hemphill (1949) described leadership as *"the accomplishment of a goal through the direction of human assistants,"* while Koontz (1955) similarly defined it as the ability to *"successfully marshal human collaborators to achieve a particular end."* Contemporary scholarship expands these earlier formulations by conceptualizing leadership as a social process grounded in power, influence, and responsibility (Northouse, 2022; Yukl, 2013). Rather than being fixed traits possessed by individuals, leadership capacities are understood as relational and context-dependent, shaped by social norms, institutional expectations, and cultural frameworks.

Within institutional hierarchies, the meaning and practice of leadership can diverge substantially for men and women. Extensive research demonstrates that gender differences manifest in both leadership styles and followership behaviors. For instance, women frequently employ participative or democratic leadership approaches, which emphasize collaboration and empowerment (Rosener, 1990). Large-scale meta-analyses further show that women tend to exhibit transformational leadership behaviors - including individualized consideration and inspirational motivation - more effectively than men (Eagly et al., 2003; Bass & Riggio, 2006). Despite this, women's leadership continues to be underrecognized or undervalued across many cultural contexts, especially in male-dominated institutions and professions.

In line with corresponding theoretical developments in leadership studies, scholars increasingly acknowledge that leadership and followership are interdependent and co-constructed. Social identity theory reframes leadership as emerging from shared group membership: effective leaders are perceived as *"one of us,"* acting in alignment with collective norms, values, and interests (Haslam, Reicher, & Platow, 2011). From this perspective, followership is not passive but actively shapes who becomes a leader, how authority is interpreted, and which leadership styles are accepted or resisted. Relational leadership theories further highlight that leadership arises from ongoing interactions between leaders and followers, where each party mutually shapes expectations, behaviors, and outcomes (Uhl-Bien et al., 2014).

Taken together, this conceptual framework underscores the cultural, gendered, and relational dimensions of leadership and followership. These dynamics are crucial for

understanding the persistent underrepresentation of women in leadership roles within Armenia's scientific and educational sectors, where patriarchal norms and symbolic hierarchies continue to structure access to authority, legitimacy, and influence.

Historical Perspective: Leadership and Followership in Armenian History and Culture

Armenian history provides a distinct foundation for examining leadership and followership as culturally positioned practices shaped by centuries of political, religious, and social transformation. Traditional Armenian conceptions of leadership emphasize ***collective resilience, moral responsibility,*** and ***service-oriented authority,*** reflecting a cultural model in which leaders and followers jointly uphold community survival and national identity. These principles - deeply rooted in Armenian historical memory - continue to influence contemporary understandings of authority, gender roles, and educational leadership.

Throughout history, Armenian leadership has taken form in response to existential challenges, foreign domination, and the need for cultural preservation. Medieval military commanders (***sparapet***), royal figures, clergy, and intellectuals collectively shaped Armenian notions of authority. In these contexts, leadership was understood not merely as positional power but as ***stewardship,*** involving moral integrity, sacrifice, and communal responsibility.

Followership, correspondingly, was grounded in ***loyalty, solidarity (****miabanutyun***)**, and trust. Rather than a passive role, followership was conceived as active participation in a shared mission: defending the homeland, sustaining faith, or contributing to cultural continuity. Thus, leadership and followership historically operated as ***relational practices***, defined by mutual obligation and collective purpose.

Despite the relational character of Armenian leadership traditions, authority has historically been embedded within ***patriarchal structures.*** Social, political, and religious leadership positions were predominantly allocated to men, reinforcing cultural narratives of male guardianship, rationality, and decision-making power. These norms were institutionalized through the family system (the patriarch as head of the household), political governance, and especially through the Church.

However, Armenian history also includes women who acted as significant political, spiritual, or cultural leaders, challenging the assumption of uninterrupted male dominance. Historical sources and contemporary analyses reveal several instances of women in formal leadership positions: *Queen Zabel of Cilician Armenia*, who ruled in the 13th century despite political turmoil and patriarchal pressures; *Diana Apcar*, appointed in 1920 as the diplomatic representative of the First Republic of Armenia in Japan, one of the first female diplomats globally. Women played crucial roles in Armenian resistance movements: *Sose Mayrig*, a fedayeen leader, is widely regarded as a national hero; in addition, numerous unnamed women participated in self-defense units during the late Ottoman era, the Artsakh wars, and various uprisings. Literature highlights that women's leadership in conflict contexts is often framed as exceptional rather than indicative of broader gender capabilities. Nevertheless, these figures illustrate an alternative leadership model rooted not in institutional authority but in communal protection and moral courage.

Numerous women educators of the 19th-century national revival period demonstrate that Armenian leadership traditions also contain ***counter-narratives of feminine authority***, albeit less recognized in mainstream historiography.

Armenian diaspora studies reveal that women habitually become cultural leaders: preserving language, maintaining community ties, transmitting traditions, and sustaining diasporic identity (The Armenian Diaspora and Stateless Power: Collective Identity in the Transnational 20th Century, 2023). This leadership is informal yet pivotal.

Women structure community followership through care labor, educational practices, social organization, and the intergenerational transmission of memory.

A comprehensive understanding of gendered leadership and followership in Armenia requires an attention to the foundational role of Christianity in shaping cultural expectations of authority, duty, and communal life. Christianity, formally adopted in 301 CE, profoundly influenced Armenian social norms, moral frameworks, and institutional practices (Mathews, T. F., & Wieck, R. S., 1994). Its imprint remains visible in contemporary educational and gender dynamics.

Christian leadership ideals - centered on humility, sacrifice, and service - have historically reinforced moralized conceptions of authority in Armenian culture. Drawing on Christian ethics, leaders are expected to embody virtues such as compassion, justice, and selflessness, aligning closely with traditional Armenian understandings of stewardship, collective responsibility, and moral duty. These expectations continue to shape how leadership is interpreted within schools, families, and communities.

The Armenian Apostolic Church has operated for centuries not only as a religious institution but also as a cultural, political, and educational authority (Hovannisian, 2004). While its hierarchical structure has long mirrored patriarchal norms, many contemporary clergy and faith-based educators actively work to challenge gender bias, promote inclusion, and reinterpret Christian teachings in ways supportive of gender equity. Such initiatives reflect broader shifts within Armenian society toward more egalitarian interpretations of Christian principles.

Christian teachings on community, unity, and mutual care also play a central role in the process of formation of leadership and followership norms. Communal solidarity (miabanutyun), a key feature of Armenian identity, resonates strongly with Christian notions of collective belonging (Antonyan, 2011). As a result, leadership is often conceptualized not merely as positional authority but as the capacity to nurture collaboration, social cohesion, and shared purpose. These expectations tell the cultural role of teachers, who are frequently perceived as moral guides and community builders rather than solely transmitters of academic knowledge.

Despite limited access to formal ecclesiastical authority, Armenian women have long undertaken significant religious, social, and educational responsibilities. Through teaching, caregiving labor, community organization, and participation in mission work, women have exercised influential - though often informal or undervalued - forms of leadership that have sustained Armenian spirituality and cultural continuity (Abrahamian, 2006). These contributions highlight the dissonance between women's central societal roles and the structural exclusion often embedded within institutional religious hierarchies.

However, formal leadership pathways within Armenian church institutions remain constrained for women, revealing persistent tensions between patriarchal structures and the transformative ethical potential of Christian values. This tension shapes contemporary debates concerning gender, authority, and followership in Armenian educational and religious contexts. It also illuminates broader contradictions in how leadership is constructed: while Christian tradition valorizes moral authority and service - qualities widely embodied by women teachers - social norms continue to associate formal leadership with masculinity.

Modern Armenia still reflects patriarchal norms that limit women's public leadership. Studies show: underrepresentation of women in political decision-making; gender stereotypes that perceive leadership as masculine; cultural expectations that women prioritize family obligations. Even when formal barriers diminish, informal norms continue to restrict women's leadership trajectories (ADB, 2020).

Women's participation in environmental movements, human rights organizations, local governance, and grassroots mobilization demonstrates a shift toward more inclusive social leadership. However, followership remains gender-stratified; women are repeatedly positioned as supporters or mediators rather than recognized as primary change agents (Gevorgyan,2014).

A gender-sensitive framework, therefore, recognizes that: women's leadership in Armenian history is not merely exceptional - it is systematically overlooked; followership structures reinforce, but also have the potential to challenge, patriarchal norms; leadership is culturally embedded and relational, shaped by communal values, identity, and moral expectations.

Armenian history and Christian cultural influences together create a complex tapestry of leadership and followership norms. While deeply rooted patriarchal structures have traditionally privileged male authority, alternative models emphasizing service, morality, community, and even feminine divine symbolism provide meaningful counter-narratives that validate women's leadership roles. These historical and cultural dynamics inform contemporary gendered interactions in Armenian educational spaces, shaping how authority is perceived, how followership is enacted, and how leadership is culturally legitimized or contested.

Research Design and Methodology

Given that the concepts of gender, leadership, and followership transcend national and institutional boundaries, this study began by examining how these notions are understood across different socio-cultural and historical contexts. The research employs an analytical approach to deconstruct the meanings ascribed to leadership and followership within educational and academic settings, applying a gender-focused lens to examine how these concepts are shaped, reinforced, and contested.

Central to this inquiry is uncovering how power relations, social inequalities, and dominant narratives shape expectations around who leads and who follows. The study further explores the role of archetypes in structuring gendered dispositions toward leadership and followership, emphasizing the interplay between cultural archetypes, the collective unconscious (Jung, 1969), and persistent stereotypes regarding women's authority.

A ***qualitative interpretivist design*** guides this research. Interpretivism assumes that social reality is constructed through interactions, shared meanings, and lived experiences (Schwartz-Shea & Yanow, 2012). Because concepts such as leadership, authority, masculinity, resistance, and followership are socially negotiated rather than fixed, this epistemological stance allows the study to capture the nuances of how gendered expectations are produced and enacted in everyday school life. Qualitative approaches are particularly suited for examining subjective experiences, cultural norms, and power relations in educational contexts (Merriam & Tisdell, 2016).

The methodology focuses on understanding how gendered norms shape leadership–followership dynamics in Armenian classrooms, specifically the interaction between predominantly female teachers and male students. To generate rich, multilayered insights, the study employed ***semi-structured interviews*** and ***non-participant classroom observations,*** enabling both discursive and behavioral data to be examined.

Semi-structured interviews allowed participants to express their own interpretations and provided the researcher with flexibility to explore emerging themes in depth (Kvale & Brinkmann, 2015). Complementarily, non-participant classroom observations provided contextual insight into how authority, resistance, and gendered practices were enacted in everyday school interactions (Emerson, Fretz, & Shaw, 2011).

The research was conducted in ***six public schools in Armenia***, selected to represent a range of educational settings including urban, semi-urban, and rural areas. Public schools were chosen due to the pronounced feminization of the teaching workforce, making them a critical site for analyzing the gendered contradictions of leadership and followership. The study focused on classrooms in grades 8–11, as adolescence represents an acute developmental stage during which gender norms and identity performances are particularly pronounced.

A purposive sampling strategy was employed to recruit participants who could offer the most relevant and diverse insights into leadership and followership dynamics.

Purposive sampling prioritizes depth and contextual understanding over statistical generalizability (Patton, 2015). The participant pool included 12 **female teachers** across various subject areas to capture variation in leadership styles and disciplinary practices. Additionally, **36 students** (boys and girls) participated in discussion groups to explore their perceptions, experiences, and interpretations of authority, gender, and classroom leadership.

Socially Constructed Expectations on Leadership and Followership: Evidence from Interviews with Armenian Students

The excerpts obtained from discussion groups with Armenian schoolchildren highlight the significant impact of socially constructed gender expectations on how young people perceive leadership, followership, and academic engagement. These statements exemplify how gendered norms are internalized and reproduced in educational settings, shaping students' behaviors, aspirations, and associations with knowledge.

The claim that *"learning is for girls"* reflects a pervasive cultural stereotype that associates intellectual effort, diligence, and academic success with femininity. Such discourses implicitly construct schooling as a feminized domain and position boys as outsiders to educational achievement. This framing is reinforced by peer policing mechanisms, as seen in statements such as *"I'm not a nerd"* and *"If I study well, the*

boys will make fun of me." These expressions reveal the extent to which boys feel pressure to distance themselves from academic commitment to conform to dominant constructions of masculinity characterized by nonchalance, resistance to authority, and disengagement from feminized domains.

Similarly, interview excerpts that distinguish between leadership and followership as gendered practices, *"followership is for women, leadership is for men,"* demonstrate how students conceptualize authority through a binary hierarchical lens. Leadership is commonly framed as a masculine domain associated with control, assertiveness, and dominance, whereas followership is culturally coded as feminine, linked to passivity, receptivity, and compliance.

The statement *"a man can't follow women"* makes explicit the gendered logic that delegitimizes women's authority, including that of female teachers, by presenting male followership as a violation of masculine identity norms. Such beliefs not only reproduce patriarchal structures but also constrain boys' willingness to recognize or accept women as legitimate leaders within educational institutions.

The final observation - *"carriers of knowledge are women"* - reflects students' awareness of the feminization of the teaching profession in Armenia. While this acknowledgment shows the central role women play in knowledge transmission, it simultaneously exposes a cultural paradox: even though women occupy positions of pedagogical authority, their leadership remains symbolically devalued due to ingrained gender hierarchies. As a result, male students may experience cognitive dissonance between the institutional reality of women's expertise and the cultural expectation that authority and knowledge ownership are masculine attributes.

Collectively, these narratives exhibit how gendered norms shape educational subjectivities and reinforce unequal power relations in the classroom. They demonstrate that boys' alienation from learning is not merely individual or behavioral but embedded in broader cultural scripts that define what it means to be a "proper" boy or girl. These excerpts illuminate the ways masculinities are constructed in Armenian educational contexts and how these constructions influence leadership and followership dynamics, student engagement, and the recognition of female authority.

Archetypes, Symbolic Power, and Gendered Leadership/Followership in Armenian Education

Carl Jung's analytical psychology offers a foundational psychological lens for understanding gendered patterns of leadership and followership, particularly the resistance male students may demonstrate toward women's authority. Jung posited that societies share a *collective unconscious* composed of archetypes - universal symbolic templates that shape how individuals perceive authority, knowledge, and gendered social roles (Jung, 1969). Although archetypes are universal in form, they manifest differently across cultural contexts. In the Armenian case - where leadership has been historically masculinized - archetypal imagery plays a central role in structuring expectations about who is entitled to lead and who is expected to follow.

Archetypes, Collective Unconscious, and Gendered Perceptions of Authority. Archetypes operate as symbolic models that influence how leaders are idealized and how followers position themselves (Kets de Vries, 2006). In Armenian cultural memory, shaped by centuries of militarization, national trauma, and patriarchal social

organization, certain archetypes have become particularly noticeable.

The ***Patriarch/King archetype*** - associated with protection, authority, and governance - aligns with historical images of male military leaders, clergy, and household heads. This archetype parallels Jung's "Father" and "Ruler" figures, which represent command, order, and epistemic authority (Jung, 1964). Conversely, the ***Mother/Great Mother archetype***, symbolizing care, nurturing, and moral guidance, maps onto Armenian cultural expectations of women as caregivers and educators. Teaching, consequently, is symbolically feminized: valued for its moral dimension but not associated with authoritative leadership.

This *symbolic* distribution introduces what Jung (1969) describes as ***archetypal contradiction:*** women teachers are culturally aligned with nurturing roles, yet they are institutionally positioned as authoritative leaders responsible for evaluation, discipline, and the transmission of knowledge.

Archetypes and Masculinized Models of Leadership

The Armenian collective unconscious, shaped by historical narratives of survival, resistance, and national heroism, strongly aligns leadership with masculine archetypes:

- ***The Hero*** – courage, dominance, overcoming adversity; deeply intertwined with Armenian military history and nationalist mythology.
- ***The Ruler*** – governance, discipline, control; embodied historically by male kings, princes, patriarchs, and clergy.
- ***The Magician*** – mastery of knowledge and transformative power; culturally represented by male sages, priests, philosophers, and intellectuals.
- ***The Outlaw*** – rebellion, boundary-testing, rejection of authority; aligning with adolescent masculinity and oppositional behavior.

These archetypes create a symbolic template in which authority, discipline, and epistemic control are coded as masculine traits (Connell, 1995). Consequently, even when women are formally positioned as leaders - as in Armenian schools - the cultural unconscious may perceive their authority as misaligned with legitimate leadership.

Archetypes and Feminized Expectations of Followership

In contrast, archetypes aligned with followership - obedience, relationality, receptivity - are culturally feminized:

- ***The Caregiver*** – nurturance, support, emotional labor; aligned with female teachers' expected roles.
- ***The Innocent*** – compliance, moral purity, trust; traits often expected of girls in educational settings.
- ***The Lover/Connector*** – relationality, emotional sensitivity; qualities frequently devalued in leadership yet valorized in caregiving positions.

These archetypes shape expectations about who should follow and how. Following a woman leader thus becomes ***symbolically feminized***, generating tension for male students whose identity is shaped by hegemonic masculinity (Connell, 1995). In this framework, followership itself becomes a gendered performance, where compliance with female authority is perceived as a threat to masculine identity.

Archetypal Misalignment and Resistance to Women Teachers

Women teachers in Armenia occupy a structurally contradictory position. Institutionally, they embody aspects of the ***Ruler*** and ***Magician*** archetypes - they structure the classroom, control knowledge, and exercise evaluative authority.

Culturally, however, they are expected to embody the ***Caregiver*** archetype. This disjunction creates what leadership theorists describe as a ***double bind*** (Eagly & Karau, 2002): when women enact authority, they violate cultural expectations of femininity; when they enact caregiving, they risk losing professional legitimacy.

For male students - socialized into gender hierarchies reinforced by family structures, peer culture, and national narratives - following a woman leader requires adopting an archetypically feminized position. Jungian theorists suggest that such situations activate ***projection,*** whereby internal anxieties about masculinity are displaced onto women authority figures (Jacobi, 1973). This dynamic can manifest in resistance and boundary testing, mockery or public challenge, disengagement from academic tasks, and symbolic withdrawal from the learning process.

This pattern is not merely behavioral but deeply symbolic - what Bourdieu (1990) would describe as a clash between embodied habitus and institutional structure.

Archetypes, Symbolic Violence, and Social Reproduction

Bourdieu's theories help illuminate how archetypal expectations become mechanisms of ***symbolic power*** and ***symbolic violence*** (Bourdieu, 1991, 1992). Symbolic violence refers to the subtle, normalized ways through which cultural hierarchies are reproduced, rendering certain forms of authority legitimate and others illegitimate.

In Armenian classrooms, symbolic violence manifests through the naturalization of male authority as legitimate, the devaluation of women's leadership, the perception that knowledge delivered by women carries less symbolic weight, and gendered interpretations of assertive women teachers as "aggressive" or "inappropriate."

Archetypes, functioning as cultural symbols, reinforce these inequalities. Masculinized archetypes (Hero, Ruler, Magician) legitimize male leadership, while feminized archetypes (Caregiver, Innocent) naturalize women's subordinate positioning. Through habitus, male students internalize these symbolic hierarchies, producing resistance to female authority as a culturally sanctioned performance of masculinity.

Integrated Theoretical Lens

By integrating Jungian archetype theory with Bourdieu's symbolic violence, Connell's hegemonic masculinity, and Foucault's conceptualization of power/knowledge, this framework reveals how gendered authority in Armenian classrooms is produced at multiple levels: ***psychological*** (archetypes and projection), ***cultural*** (gendered national narratives), ***institutional*** (school structures), ***symbolic*** (legitimized forms of authority), ***performative*** (male students' resistance).

This integrated perspective explains why women's leadership in education - despite their numerical dominance in the teaching profession - remains symbolically devalued, and why followership among boys is fraught, contested, and often enacted as resistance or alienation from learning itself.

Women Teachers as "Uncomfortable Leaders" in a Patriarchal Society

In patriarchal social contexts, women's authority is often questioned, resisted, or rendered symbolically secondary, even when they occupy formal leadership positions (Connell, 1995; Bourdieu, 1991). In contemporary Armenia, teaching is a highly feminized profession; women teachers hold institutional authority within the

classroom, yet frequently encounter implicit cultural barriers that undermine their legitimacy as leaders. This contradiction positions women teachers as ***"uncomfortable leaders"*** - leaders whose authority is formally recognized but culturally contested (Kets de Vries, 2006).

When a woman assumes the teacher role - an authority figure who sets rules, evaluates performance, and holds epistemic power - students confront a leadership configuration that conflicts with the masculine leadership archetypes they encounter in society (Jung, 1968).

Feminine leadership styles - relationship-oriented approaches, collaboration, empathy, and supportive discipline - may be interpreted through patriarchal lenses as weakness, forcing women teachers into a contradictory position: they are expected to nurture while simultaneously exercising authority (Eagly & Carli, 2007).

This structural paradox positions women as legitimate **"owners of knowledge"** in the classroom, yet culturally devalues their authority. Male students socialized into patriarchal norms may resist female authority because leadership is culturally construed as masculine (Connell, 1995). The classroom thus becomes a site of **gendered power negotiation**, where women teachers' leadership challenges the patriarchal order.

Gendered Authority, Knowledge Alienation, and Masculine Resistance

Although Armenian teaching is predominantly female, broader cultural systems remain strongly influenced by ***hegemonic masculinity*** (Connell, 1995), creating a contradiction: women hold institutional authority but are culturally devalued. Male students, socialized to expect male dominance, may experience tension when positioned as followers to a female teacher who is also the primary keeper and transmitter of knowledge.

Masculine Prerogative and Followership

Connell's theory explains how male students internalize a gendered hierarchy before school (Connell, 1995). Following - listening, complying, accepting evaluation - is culturally coded as feminine, so following a woman violates internalized masculine norms.

Symbolic Power and Knowledge

Bourdieu's concept of symbolic power highlights that teacher authority is not only institutional but also ***symbolically recognized*** through cultural practices (Bourdieu, 1991, 1992). In patriarchal systems, intellectual authority is coded as masculine. Male students may reject knowledge from women teachers as a symbolic act to reassert masculine hierarchy, producing ***alienation*** from knowledge (Bourdieu, 1991).

Power/Knowledge and Resistance

Foucault (1980) suggests that resistance is embedded in micro-political practices. Male students' classroom behaviors, such as refusal to participate, challenging authority, and devaluing tasks, function as strategies to restore gendered hierarchies, illustrating the intersection of **power/knowledge and identity**.

Symbolic Misalignment and Archetypal Contradictions

Jung's (1969) concept of archetypes clarifies the psychological dimension introduced in Armenian culture: privileging the Hero, Ruler, and Outlaw archetypes as male. Female teachers embody the Caregiver or Mother archetype, which conflicts with the masculine-coded leadership archetypes. Male resistance thus represents

an ***archetypal dissonance,*** where following a woman threatens the collective unconscious expectation of male authority.

Discussion

Gendered Socialization and Leadership Norms

The interviews reveal that Armenian students internalize a **binary gender order** early in life: *"leadership is for men"* and *"men can't follow women"*. Academic engagement is feminized, consistent with Connell's (1995) concept of hegemonic masculinity, which organizes social expectations by legitimizing male dominance and relegating women to supportive roles.

Statements such as *"I'm not a nerd"* and *"if I study well, boys will make fun of me"* illustrate that male students avoid intellectual engagement to preserve masculine identity, confirming that followership is culturally coded as feminine (Eagly & Carli, 2007).

Archetypal Dissonance and Female Authority

Jung's (1968) theory explains why boys resist female teachers. Male students have internalized masculine leadership archetypes (Hero, Ruler, King), while women teachers symbolically represent Caregiver or Mother archetypes. This ***archetypal misalignment*** produces psychological discomfort, manifesting as resistance, mockery, or disengagement.

Symbolic Violence and Knowledge Devaluation

Bourdieu's (1991, 1992) concept of symbolic violence explains why and how women-teachers' authority is devalued. Students' implicit beliefs, such as *"a man can't follow women"*, normalize gender hierarchy, reproducing structural inequality. Knowledge itself becomes gendered: male students distance themselves from academic engagement to resist subordination, creating a cycle of ***resistance → disengagement → devaluation of authority and knowledge.***

Resistance as Power/Knowledge Negotiation

Foucault's (1980) framework positions resistance as a negotiation of power. Male students' refusal to follow female authority represents ***micro-political acts*** aimed at restoring masculine dominance. Disengagement is not a lack of ability, yet it is a ***performative assertion of hegemonic masculinity***, reflecting broader cultural norms (Connell, 1995).

Knowledge Alienation

Male students' avoidance of learning illustrates ***gendered knowledge alienation***: knowledge is culturally coded as feminine when transmitted by women, creating an identity-based barrier to learning. Female teachers, in contrast, must navigate contradictory expectations - enforcing discipline while maintaining a culturally acceptable feminine persona – producing a double bind (Eagly & Carli, 2007).

Schools as Sites of Gendered Power Negotiation

Classrooms function as microcosms of patriarchal society. The findings show:

- Leadership and followership are socially constructed and gendered
- Female authority is central yet contested
- Male students resist to protect their identity
- Knowledge becomes a symbolic resource embedded in the gender hierarchy.

This confirms that Armenian classrooms reproduce cultural norms while simultaneously offering a site for negotiation and contestation of gendered authority.

Conclusion

This study demonstrates that Armenia's educational system functions as a micro-arena where broader patriarchal norms are reproduced, negotiated, and occasionally challenged. Although women constitute the overwhelming majority of teachers and hold formal institutional authority, their leadership remains culturally contested. The findings highlight a persistent contradiction: women teachers are positioned as legitimate transmitters of knowledge, yet patriarchal norms devalue their authority and oblige the forms of leadership they can exercise.

Male students' resistance - expressed through disengagement, refusal to follow instructions, or devaluing academic tasks - emerges not as individual behavior but as a gendered performance rooted in hegemonic masculinity. Such resistance reflects the internalization of gendered hierarchies in which leadership is coded as masculine, followership as feminine, and intellectual engagement as incompatible with masculine identity. Drawing on Connell, Bourdieu, and Foucault, the study shows how symbolic power, hegemonic masculinity, and micro-political acts of resistance intersect to shape classroom dynamics. Jungian archetypal analysis further reveals the psychological tension created when female authority conflicts with culturally valorized masculine leadership archetypes.

The Armenian classroom thus becomes a site where gendered power relations are enacted and reproduced through everyday practices. Yet, it also holds transformative potential: by making these dynamics visible, educators and policymakers can begin to confront the structural and cultural barriers that position women as "uncomfortable leaders."

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

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The authors affirm this research did not involve human subjects.

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