



Proceedings of
THE ANNUAL CONFERENCE
OF BUSINESS, ECONOMICS
AND POLITICS IN THE
MIDDLE EAST
2023

THEME

Digitalization, Governance, and Sustainability



ISSN:

3009-772X



The
BRITISH UNIVERSITY
IN EGYPT



The Faculty of Business Administration, Economics and Political Science (BAEPS) at The British University in Egypt is delighted to host
The Annual Conference of Business, Economics and Politics in the Middle
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The Middle East region is a 'hotspot' where the effects of security related issues, migration, refugees, as well as climate change are greater than in other regions of the world, with implication not only on global and national politics, but equally on national and international businesses and economies. In the same sense, the region poses challenges as well as chances for good governance, sustainability, and digitalisation. The aim of this annual conference is to create and sustain emphasis on studying this region while employing and encouraging interdisciplinary perspectives ranging from business, economics, political science, and sociology.



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Examining the Impact of Big Data Analytics and Neurological Marketing Research on Marketing Automation in the Egyptian Passenger Automobile Industry

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Abstract:

This research paper seeks to emphasize the impact of Big Data Analytics and Neurological marketing research on marketing automation in the Egyptian Passengers Automobile Industry. The motivation for undertaking this research stems from the strong evidence that big data analytics, neurological marketing research and marketing automation are extremely used nowadays by companies, as they become the multimillion industries within the current turbulent and the hypercompetitive Aspects of modernbusiness environments. On the basis of the above idea, that the three variables are the major hot topics nowadays, thus the research aims to bridge the gap between the variables by investigating the impact of Big Data Analytics and Neurological marketing research onmarketing automation in the Egyptian Passengers Automobile industry. This research willarguably contribute to provide in-depth investigation of the research phenomenon and variables through a mixed approach. An exploratory qualitative design will be devised, within depth interviews with concerned marketers to define the research gap, develop the Conceptual model and formulate its testable hypothesis. Subsequently, a conclusive causal design will be devised through a nonprobability quota sample and a structured questionnaire for quantitative analysis purposes relying on confirmatory factor analysis and path analysis for hypothesis testing. Data collection will be implemented through administrating the structured questionnaires in the Egyptian Passengers

Automobile Industry as it is claimed to be a relevant and insightful empirical context to demonstrate the interrelationships among the four main research variables.

Keywords: Big Data Analytics, Neurological Marketing Research and Marketing Automation.

Introduction

In the span of just over two decades, the world has undergone significant transformations, particularly within the business landscape. These changes have been primarily driven by the widespread adoption of the internet (Abd Aziz, Long, & Hussain, 2023). Consequently, an increasing number of companies are embracing software tools and incorporating digitization into their strategies (Ayokanmbi, 2021). Big data analytics, neurological marketing research and marketing automation have become the most remarkable buzzwords in the field of marketing recently (Saeed & Husamaldin, 2021). They have been recognized as “the next frontier for innovation, competition and productivity” (Abd Aziz, Long, & Hussain, 2023). Massive data has emerged and been accumulated across various domains over the last 20 years (Ayokanmbi, 2021). Accordingly, there has been a huge increase in research on big data, neurological and marketing automation to be considered as hotspot. Within the Automobile market, big data analytics, neurological marketing research and marketing automation are considered the key points to unlocking the market potential in the highly competitive dynamic market. They represent a tool to control the growing cost of compliance and the risk of non-compliance due to the rapid development of information technology. Abundance of customer database can be leveraged by automobile industry to acquire profound understanding current customers through data gained from internal systems to enhance tailored services, boost companies profit which leads to customers’ satisfaction and engagement. Moreover, this approach

offers a variety of prominent services for the automobile industry to empower them to personalize their products. Overall, this article sheds light on how big data and analytics and neurological marketing research affect marketing automation in the Egyptian passengers' automobiles industry.

To this end, this paper will be exploratory through qualitative research. A conclusive causal research design would take place through experimentation through manipulation of independent variables and measurements of dependent variable in a real context of a major passenger automobile manufacturer and distributors in Egypt. The sampling design and plan will rely on the purposive judgement sample that reflects common marketing practice of the above variables. The measurement scales used for data collection throughout the experiment would be mainly ratio scales for quantitative facts and interval scales for perceptions and opinions about the various aspects of adoption, implementation, and management of the three model's variables. Data analysis and interpretation would rely on an appropriate portfolio of descriptive statistics, reliability, and validity tests and multi variance analysis for hypothesis testing purposes.

LITERATURE REVIEW

In a more technical view, the internet has become the primary source of generating vast amounts of data, commonly known as big data (Ayokanmbi, 2021). Our online presence has increased significantly, surpassing previous levels. As it was said "Big Data is the fuel. It is like oil. If you leave it in the ground, it doesn't have a lot of value" (Batisti~ & Laken, 2019) . Real-time analytics fueled by this data have attracted significant attention from both scholars and practitioners (Batisti~ & Laken, 2019). The visualization, processing, and analysis of these analytics enable businesses and employees to extract value from them. In addition to the partnership managers can

comprehend the performance of each partner and their overall programs (Bogdanov, Degtyarev, Korkhov, Kyaw, & Shchegoleva, 2018).

The momentum behind big data and analytics is growing, especially within the practitioner (Abd Aziz, Long, & Hussain, 2023). Continuous advancements in technology have spawned enormous amounts of data (Goundar, Bhardwaj, Singh, Singh, & Gururaj , 2021). These sources encompass a wide range of data types, extending beyond the basic information typically stored in traditional data warehouses. Examples include online transactions, emails, videos, audios, images, clickstreams, satellite coordinates, logs, posts, search queries, health records, social networking interactions, scientific data, and data from sensors and mobile applications (Saeed & Husamaldin, 2021). In contrast, traditional databases are lack the capabilities to handle such diverse data, resulting in the adoption of new technologies, methodologies, and tools to address these challenges (Goundar, Bhardwaj, Singh, Singh, & Gururaj , 2021).

Employing big data analytics in a strategic and effective manner will pave the way for making confident, evidence-based decisions that enable companies to thrive in the competitive marketplace (Saeed & Husamaldin, 2021). By gaining comprehensive insights into customer website experiences, organizations can enhance their understanding of the market and uncover business opportunities (Goundar, Bhardwaj, Singh, Singh, & Gururaj , 2021). Academic scholars widely recognize the value of applying big data analytics, In addition to the numerous companies that have invested substantial resources in related infrastructure, technologies, skilled personnel, and business practices to maintain their competitive edge (Abd Aziz, Long, & Hussain, 2023).

Notably, industry giants like Google, Apple, Facebook, Yahoo, and Twitter have begun leveraging this data to identify valuable patterns that enhance the user experience. Undoubtedly, the rapid proliferation of 4 technology devices

has resulted in the generation of vast amounts of data (Saeed & Husamaldin, 2021). The concept of big data represents an “ocean of data that necessitates sophisticated analysis. Proclaimed as a paradigm shift, big data not only transforms how organizations handle data but also revolutionizes their business operations (Abd Aziz, Long, & Hussain, 2023). Driven by these promises, global investments in big data have reached billions of dollars annually, both from private and public sectors (Ayokanmbi, 2021).

The characteristics of Big Data analytics have evolved over time due to rapid technological advancements such as the Internet of Things, machine learning, artificial intelligence, robotics, 3D printing, biotechnology, nanotechnology, renewable energy technologies, satellite, and drone technologies (Saeed & Husamaldin, 2021). These advancements have led to the differentiation of Big Data analytics into several characteristics, commonly referred to as the "V's." And many researchers have been developing more characteristics for new purposes over the past years. Despite the introduction of newer characteristics, many studies still propose the use of the original three V's: Volume, Velocity, and Variety (Saeed & Husamaldin, 2021). However, other researchers have successfully argued that big data analytics is based on five characteristics, which include Volume, Velocity, Variety, Veracity, and Value (Saeed & Husamaldin, 2021). Furthermore, some researchers have expanded the list to include seven V's: Volume, Velocity, Variety, Veracity, Value, Validity, and Volatility (Khan, Uddin, & Gupta, 2014). In recent advanced research, there has been an expansion of the number of characteristics to include ten V's: Volume, Velocity, Variety, Veracity, Value, Validity, Volatility, Variability, Visualization, and Vulnerability. However, for the specific focus of this paper, the main emphasis will be on five key characteristics used to evaluate the efficacy of Big Data analytics in marketing automation: Volume, Velocity, Variety, Veracity, and Visualization (Saeed & Husamaldin, 2021).

The quantity of marketing information generated and collected through various channels and activities is referred to as the volume of marketing data. This aspect involves the management and analysis of large datasets to uncover meaningful insights. Big data volume encompasses data from diverse sources such as text, audio, video, social networking, research studies, medical data, space images, crime reports, weather forecasting, natural disasters, and more (García & Fernández, 2022). It also includes data from customer interactions, website analytics, social media metrics, email campaigns, and other sources. The volume of marketing data can vary significantly based on the size, scale, and marketing efforts of a business. Analyzing and utilizing this data can provide valuable insights for businesses for strategic decision making (Saeed & Husamaldin, 2021).

The velocity dimension focuses on the speed which plays a great role in decision making. In other words, it helps to estimate how fast data is produced and the rate needed to be analyzed. According to data coming in large volumes useful analytic information is essentially obtained in actual time allowing companies to make accurate decisions and have quick response to market trends. It is vital for businesses agility and their steady competition in today's fast-paced marketing field (Saeed & Husamaldin, 2021). While variety refers to various data types and formats gathered in the marketing field for the extremely heterogeneous data sources. It comprises a broad variety of data sources including customer demographics, purchase history, website traffic, social media interactions, email engagement, and more. Besides text, sensor, audio, video, graph, and more. Marketing data variation is crucial as it enables businesses to acquire a holistic understanding of their target market, their preferences, and their behavior across various channels (García & Fernández, 2022; Saeed & Husamaldin, 2021).

Veracity represents the quality, accuracy, and consistency of data. Data sufficient accuracy is essential to validate and ensure the precision of the datasets used, for business decisions making. On the other hand, visualization includes the presentation of data of almost any type in a graphical format to have beneficial role in interpreting, realizing, and delivering meaning better than spreadsheets and reports chock-full of numbers and formulas. Confusion with the visual or misleading data interpretation can be caused by choosing the wrong visual aid or resorting to the most common type of data visualization. One of the obstacles that affects the reporting and analysis speed is understanding what types of graphs to use and why (Saeed & Husamaldin, 2021; García & Fernández, 2022).

Moving to the neurological marketing research, it combines psychological and neuroscience techniques to explore and manipulate marketing related issues to control customer's buying behavior and their decisionmaking process in marketing (Ramachandran¹, 2021). Therefore, the scientific illustration of customer's preferences and behavior occurs by enhancing our recognition of the customer's cognitive, neuronal, and emotional mechanisms (Kari, Arun, & Pundir, 2020). It can be a method measurement of psychological and neural signals to have deep understanding of the customers' motivations, preferences, and decisions. The most usable method is brain scanning, which measures neural activity, and physiological tracking and eye movement (Gaafar & Romeedy, 2022).

Neuroimaging is a branch of medical imaging through the brain used not only in disease diagnosing brain health evaluation, but also it helps to learn about how brain works and how its various activities affect the brain (Yan, et al., 2022). In the current of marketing field, neuroimaging can be effective means to recognize wither a stimulus such as advertisement, communication, or product can have specific mental response as emotion, preference, memory or

foretell the outcomes of this stimulus on behavior such as consumption or purchasing (Yan, et al., 2022). Subjects' brain responses are measured and can be evaluated by a combination of neuroimaging after being exposed to stimuli of varying types. The result obtained can be a means to recognize the subject's future behavior and who situated with respect to purchase or consumption of products according to the objective evident of neuroimaging (Gaafar & Romeedy, 2022). Referring to our research, the following are the tools that will measure the Neurological marketing research in this research; Neuroimaging, Neurophysiology, neuro-self-report and Neurobehavioral tools. Neurophysiology is a field within physiology and neuroscience that focus on the nervas system function not nervus system architecture. Consumer neuroscience deals with neurophysiological mechanisms that control consumer decision making and behavior (Reem , Bagozzi,, Kortam, & Mahrous, 2016). On the other hand, Self-reporting deals with participant's feelings, symptoms, attitudes, beliefs, behavior and so on. Questionnaires and interviews are methods to gain participants' responses on the level of experimental studies (Pekrun, 2020). While Neurobehavioral pertains to the relationship between the functioning of the nervous system and behavior. It can be a method for studying behavior revealing the nerve importance and brain function. The ability to define and measure these behaviors helps to realize the neural mechanism concerning behavior (Williams, Wood, Alderman, & Worthington, 2020).

Marketing automation is a multi-billion business today. It has become an essential means to deal with marketing among others by making use of targeted marketing based on customer behavior and orientation. Consequently, using marketing automation has become frequently used. For instance, integrated into Customer Relationship Management software. Combination marketing and sales has become possible as it is ideal to

enhance overall sales and helps to maintain long and profitable relationship with clients (Immonen, 2022).

Historically, the concept of marketing automation dated back to the beginning of 1990ies, when the first companies offered software for marketing automation. According to high speed in technology and marketing evolution, the usage of marketing automation systems has expanded recently. At the beginning, marketing automation focused on the delivery campaign management and email marketing. Afterwards, the approach of marketing automation converted into holistic strategic approach rather than a sole software solution (Natterer, 2021). Several prominent companies, including Microsoft and Salesforce, have seamlessly integrated marketing automation into their Customer Relationship Management (CRM) systems. This integration not only facilitates marketing automation but also enables the sharing of information within the organization, thereby supporting Customer Knowledge Management (Nilsson & Tsakmaki, 2019). Consequently, the process initiated by marketing automation not only contributes to increased sales but also delivers benefits across various organizational domains (Immonen, 2022).

In the early stages, marketing automation was initially defined as "the automated marketing decision support on the internet" (Rae, 2016, p. 13). Essentially, marketing automation involves the utilization of digital tools and software to automate marketing processes (Natterer, 2021). Further, it was elaborated on this concept, "marketing automation intends to utilize multiple data sources to design communications on-the-fly (in real time) for all kind of touch points" (Rae, 2016, p. 13). In essence, marketing automation is the integration of technology, software, and data into daily marketing strategies to maximize campaign productivity and effectiveness (Immonen, 2022). This study adopts the definition provided by Heimbach et al. (2015), which refers to

marketing automation as “an ideology that uses database to further execute automated communications in customer interactions” (Rae, 2016, p. 13).

Presently, it is possible to automate all digital marketing activities, ranging from segmentation and targeting to service provision, advertising, distribution, retailing, and pricing. Marketing automation has eliminated the need for manual work in marketing, as several tasks can now be automated, including email and social media marketing, ad campaigns, lead management, customer relationship management, and marketing analytics (Immonen, 2022). The automation of marketing processes can even surpass decisions made by managers, as the quality and availability of data are high, while managerial analysis capabilities remain limited (Tiitola, 2022).

The effective administration of customer Databases Marketing is essential element of marketing automation systems. which are created by gathering data from various channels, they can be used to manage customer relationships throughout their entire journey (Hashem, 2022). A customer database includes potential and exciting customers information which can be details such as geography, demographics, psychographics, and purchase patterns. Using this data extracting valuable approaches of customers segments and their individual favorable can be extracted and analyzed extensively by marketers (Natterer, 2021). These data sources may comprise both customer databases within Customer Relationship Management (CRM) systems and online behavioral data such as cookies, IP addresses, or clickstream data from websites. Database marketing can be a tool to design, evaluate, execute, measure, and tailor customized marketing initiatives. It includes customer information and data relevant to marketing activities which can be analysed to be used in these activities (Hashem, 2022; Rae, 2016).

Customers today are gravitating toward brands that feel like they listen to them, understand them, and pay attention to their specific desires and requirements.

That's where personalization comes in. Personalization serves as a means for brands to customize the messages, offers, and experiences they provide based on the unique profiles of each visitor (Rae, 2016). By leveraging technology and customer information, personalization enables brands to carry out distinctive electronic commerce interactions with individual customers (Tiitola, 2022). For instance, an online store might use technology-driven personalization to suggest product labels that align with a customer's previous purchases. Similar to the principles of database marketing, personalization utilizes customer data to further tailor and customize communications, offerings, services, or other interactions for individual customers. By customizing experiences, offers, services, and interactions, personalization facilitates the establishment of connections between brands and consumers (Rae, 2016).

A competitive advantage is what sets a business apart from its competitors. It enables a business to achieve higher profits, attract a larger customer base, and foster stronger loyalty among existing customers. Competitive advantage plays a central role in determining a company's performance in a competitive market which emerges from the value or benefits that the company can provide to its customers (Ida & Setiawan, 2022). Companies create competitive advantage by examining the various activities involved in the company's design, production, marketing, delivery, and customer support (Rae, 2016). Therefore, competitive advantage represents a position in which an organization strives to outperform its competitors (Ida & Setiawan, 2022).

A competitive advantage provides a company with distinct strengths and opportunities compared to its competitors, resulting in increased value for the company and its shareholders (Ida & Setiawan, 2022). Sustaining a competitive advantage allows companies to maintain their leadership positions in their respective industries. Within any business, a competitive advantage

can contribute to improved profit margins and market dominance (Barham, 2018). Moreover, it empowers a company to outperform its rivals. It encompasses the elements that enable a company to deliver services or products with superior quality or at a lower cost compared to its competitors, resulting in increased sales or higher profit margins. For a competitive advantage to be effective, it needs to create value for stakeholders and be challenging for others to replicate (Shahid & Sheikh, 2021).

THEORITICAL MODEL

Based on the critical review of the relevant literature on evident contributions of big data analytics and neurological marketing research and their possible implications to the quality of marketing automation, the authors argue that specific interrelationship can exist among those three main variables. This paper proposes that the wide scale adoption of big data analytics and the effectiveness of neurological marketing research applications can lead to significant and considerable improvements in the quality of marketing automation through optimizing its agenda. Accordingly, the following figure (1). Depicts the proposed relationships among the three variables configuring that big data and analytics and neurological marketing research are considered as independent variables in the form of various characteristics, applications and policies that are controlled by business, researches and marketers to reach the destination of highest possible standards and levels of the quality of marketing automation as the dependent variable of the study. Nevertheless, it is understood by authors that marketing automation can serve as an independent variable to further ultimate strategic marketing ends such as customer experience which would be a planned extension for future research.

The Proposed Theoretical Model

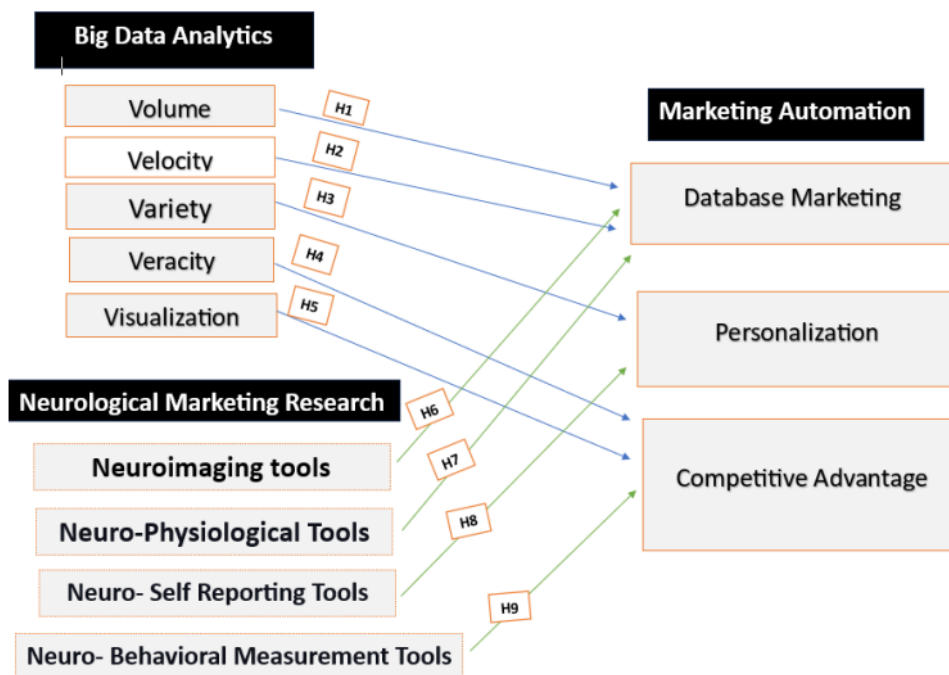


Figure1: Developed by the authors.

The underline rational behind developing the above model and putting it forward to empirical testing lies in the evidence that despite the significant research magnitude of the three main variables which led to a huge body of research on all of them and the fact that most businesses today would adopt varying degrees of their philosophies and characteristics. Simultaneously, the interrelationships and synergies among them are very rarely investigated theoretically and/ or empirically. Thus, the main research agenda of the proposed model is to set forth an argued theory that using big data analytics and neurological marketing research can boost the quality of marketing automation to unprecedented, maximized deliveries. The expected contributions of theoretical development and subsequent empirical refinement of the proposed model would be to bridge an evident research gap in conceptualizing and devising the marketing essence of big data analytics, understanding the dimensions of neurological marketing research

effectiveness and identification of drivers of quality of marketing automation for its different purposes. Apart from that the proposed model would be expected to improve and assure the market-oriented adoption of big data analytics and neurological marketing research while establishing the valid and reliable benchmark for evaluation of marketing automation quality. The initial limitation of the proposed model is threefold; (1) Reliance on Egyptian market, evident and practices, (2) exclusive focus on big data analytics and neurological marketing research among large variety of marketing knowledge paradigms and (3) emphasis on the context of passengers' automobile market and industry. Therefore, the following research proposition (testable hypothesis) have been formulated to test the model's relationships:

H1: The Volume of Marketing Data Generated by Big Data Analytics has a significant and positive impact on the quality of marketing automation for effective Database Marketing.

H2: The Velocity of Marketing Data Generated by Big Data Analytics has a significant and positive impact on quality of marketing Automation for effective Database Marketing.

H3: The Variety of Marketing Data Generated by Big Data Analytics has a significant and positive impact on marketing automation for effective personalization.

H4: The Veracity of Marketing Data Generated by Big Data Analytics has a significant and positive impact on the Quality of Marketing Automation as a source of Competitive Advantage.

H5: The Visualization of Marketing Data Generated by Big Data Analytics has a significant and positive impact on the Quality of Marketing Automation as a source of Competitive Advantage.

H6: Marketing Research Effectiveness of Neuro-imaging Tools has a significant and positive impact on the quality of Marketing Automation for effective Database Marketing.

H7: Marketing Research Effectiveness of Neuro-Physiological Tools has a significant and positive impact on the quality of Marketing Automation for effective Database Marketing.

H8: Marketing Research Effectiveness of Neuro- Self Reporting Tools has a significant and positive impact on the quality of Marketing Automation for effective Personalization.

H9: Marketing Research Effectiveness of Neuro- Behavioral Measurement Tools has a significant and positive impact on the quality of Marketing Automation as a source of Competitive Advantage.

RESEARCH METHEDODOLOGY- FUTURE EMPIRICISM

The authors are planning to extend this paper for a sequel paper through empirical testing of the research propositions argued for by the proposed model. The research design will be first an exploratory one through qualitative research with professional experts and researchers involved in using big data and analytics and neurological marketing research along with mangers of marketing automation projects and initiatives. Exploratory research design would also include comprehensive review of relevant literature and analysis of available digital secondary data for the three model's variables. A conclusive causal research design would take place through experimentation through manipulation of independent variables and measurements of dependent variable in a real context of a major passenger automobile manufacturer and distributors in Egypt.

The sampling design and plan will rely in the purposive judgement sample that reflect common marketing practice of big data analytics and Neurological

marketing research and marketing automation withing the foreseeable future of major passenger automobile enterprises operating in the Egyptian market. The measurement scales used for data collection throughout the experiment would be mainly ratio scales for quantitative facts and interval scales for perceptions and opinions about the various aspects of adoption, implementation, and management of the three model's variables. Data analysis and interpretation would rely on an appropriate portfolio of descriptive statistics, reliability, and validity tests and multi variance analysis (potentially discriminant analysis for categorial tracing of marketing automation quality imperatives and path analysis in the case of extending the model to include customer experience) for hypothesis testing purposes.

Conclusive Research Insights

As a wrap up, this research aimed to join the most promising marketing revolution and movement of knowledge-based marketing. The core research proposition of this revolution is that theoretical and practical marketing contribution can be magnified exponentially if all marketing decisions and polices are based on facts rather than assumptions and realities rather than impressions. This requires immense vertical (longitudinal) and horizontal (cross sectional) expansion of marketing data collection analysis interpretation and reporting. It can be safely argued, to the best judgment of authors that big data and analytics working in parallel lines with neurological marketing research can and would revolutionize the time outreach and the width of scale for marketing data across all global markets making the depth of marketing understanding meets safely and deliberately with the breadth of marketing generalizations. It's also argued by this paper that a clear reflection of the success or failure of this marketing knowledge revolution would be through the sustainable, effectiveness, efficiency and adaptability of marketing automation

platforms and their consequential influences on strategic marketing ends such as customer experience, customer value and brand equity.

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Examining the Impact of Digitalization on Organizational Resilience: The Mediating Role of Consumer Resistance.

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Abstract:

The rapid diffusion of digital technology and other innovations has led to dramatic changes of the organization's service operations and processes, this is more evident in today's turbulent environment than any time before as there is a growing need to examine how to manage crisis and customer experiences. As a result, the marketing landscape is changing, firms are increasingly searching for ways to better engage customers and other stakeholders as well as there is a growing need for firms to examine how to develop their services, influence consumer response to innovation and become more resilient. The growth of digitalization can create opportunities for firms, enhance the service innovation experience and allow firms to become more resilient. Accordingly, this study aims to: First, synthesis the extant literature of digitalization, consumer resistance and organizational resilience. Second, identify the conceptualization of the relationships among digitalization, consumer resistance and organizational resilience. Third, investigate whether the success in using digital technology, devices and analytics would influence consumer response to innovation. Fourth, examine the relationship between digitalization and organizational resilience. Finally, help marketers to use digitalization and impact resilience through adding value to the consumer response to innovation and coping with resistance.

Keywords: Digitalization, Consumer Resistance, Organizational Resilience

Introduction

The evolution of digital transformation leads to new technologies that regularly change key business operations and processes, affect products, organizational structures, and management, and even extend beyond firms' boundaries, by impacting sales channels and supply chains (Vial, 2019).

Being digital relates to a digital value proposition, which requires enduring and iterative testing and revising the marketplace offerings as the end state is unknown (Ritter & Pedersen, 2020).

Currently, the COVID-19 virus has accelerated the evolution of digitalization. Big data, artificial intelligence (AI), cloud computing, and blockchain have rapidly directed all firms into the digital age as digital resources are increasingly becoming key productive factors (Iannone & Caruso, 2023). Digital transformation allows firms to attain better flexibility and efficiency, improve production processes, create value propositions for innovation ecosystems, and respond to market needs (Feliciano-Cestero et al., 2023).

Thus, digital transformation management intensity prepares an organization with a renovated vision, governance, and culture, that empowers the employees' talents and innovativeness and helps them grow their capabilities during crises (He et al., 2023).

Although governments and firms exerted huge efforts toward the use of digital innovations, consumer resistance continued. So far, the reasons for resistance to these innovations exist in different contexts, such as digital financial products, and have remained unexplored to date (Talwar et al., 2023).

Digital transformation shows improvement in the marketing capabilities to better understand the challenging trends of the society and market (Pascucci et al., 2023). Therefore, Egypt launched an e-platform named Digital Egypt and a mobile app that provides a wide range of public services (MCIT, 2023).

Today's firms invest heavily in the use and development of digital technologies (hardware and software) to allow for AI, Machine Learning, IoT, and robotics

(Verhoef et al.,2021). Accordingly, there is a strong motive to value the significant impact of recent innovations on retailing, so that firms can better recognize the development of the future of retailing (Grewal et al., 2017). Digital technologies influence marketing by enhancing market analytics ability, pricing, and channel management and building relationships with customers to create value (Pascucci et al.,2023).

These new digital technologies have changed competition dramatically. In retailing, technologies have disrupted the competition environment, shifting sales to relatively young digital firms. Besides competition being more global it becomes more intense. Not only Information-rich firms in the U.S. for example Amazon, Alphabet, Apple, and Facebook but also in China such as Alibaba lead several industries (Verhoef et al.,2021).

In addition, there is a growing increase in mobile app users in emerging markets that has transformed the entire business landscape such as food apps in hospitality, fitness or health apps, and telemedicine apps in the healthcare sector (Kautish et al.,2023)

In Egypt, concerning fintech and digital financial services, there are 13.2 million users of mobile banking and about 27% of consumers use a digital money transfer app (CBE, 2023). Risk perception is proposed as an important factor affecting trust and in turn mobile banking adoption (Choudrie et al.2018).

During turbulent times, for instance, coronavirus pandemic (COVID-19), firms are necessitated to respond in creative, flexible, and resilient ways (He et al., 2023) Throughout that time, companies recognized a growing demand to use digital tools to get information, learn, make purchases, and connect in both B2B and B2C contexts. This revolution can enable a company to offer innovative products and services that meet the needs of the targeted customers and thus, offer benefits to both customers and the firm (Pascucci et al.,2023).

Meanwhile, digital transformation can reform the value creation process in marketing, via its role, structure, and tools (Pascucci et al.,2023). This perspective

used mainly as the digital and social media revolution has supported the importance of customer engagement behaviors as customers become active co-produces or put an end to value for firms (Lemon & Verhoef, 2016).

Thus, organizations using digital technologies must apply structural changes and remove any barriers that prevent transformation initiatives (Vial.,2019).

Previous studies have applied innovation resistance theory (IRT) to examine consumer resistance in diverse contexts, for instance, drone delivery and online travel agencies (Talwar et al.2023).

Consumer innovation resistance is an evolving area of marketing studies (Huang et al.,2021) as the growing use of digital technologies has radically changed consumer behavior and journey (Pascucci et al.,2023).

For instance, some difficulties appear that prevent the diffusion of innovation while using chatbots in customer service to fulfill requests without requiring a conversion as perceived privacy and time risk that influence attitudes and intentions toward using chatbots (Kwangsawad, & Jattamart,2022).

Digital transformation adoption and resultant business model innovation deeply altered consumers' expectations and behaviors, putting great pressure on traditional firms, and distracting multiple markets (Verhoef et al., 2021).

He et al. (2023) stated that investment in strategic technology allows organizations to develop an organized control of operations in crises, even if that does not necessarily contribute to employees' capabilities to understand the external chaotic environments, seek available resources, and rapidly develop effective solutions.

The results of examining the influence of digitalization on business model innovation in two different contexts; the media and automotive industries stated that both organizational capacities and employee competencies were recognized as future challenges that need to be handled by both industries (Rachinger et al.2018).

Digital technologies include social media, mobile, analytics, the Internet of Things,

and platforms and ecosystems (Vial.,2019).

Due to technological advancement, customers today are becoming an essential source of generating data, either traditional structured transactional, or unstructured behavioral data (Erevelles et al., 2016). Thus, consumer behavior is changing in response to the digital revolution (Verhoef et al.,2021).

Disruptions are inevitable, but how organizations deal with them differs as some firms fail while others survive and become more resilient (Parker & Ameen, 2018). Thus, in highly unpredictable and doubtful times, organizations need to develop a resilience ability that enables them to effectively respond to unexpected events, recover from crises, and advance future progress. (Duchek, 2020).

Queiroz (2023) stated that not all resilience-interrelated resources are necessary to build resilience and enhance performance. Consequently, in case of a disruptive crisis managers must combine the best resources to create resilience and support performance.

Thus, an organization is resilient when encountering continuous or discontinuous environmental pressure, it can absorb and/or anticipate these changes (Gilly et al., 2014).

Nevertheless, while most existing studies highlight the adoption of the new digital technologies and how digitalization influence organizational resilience, few studies have mentioned digital technology barriers to achieving organizational resilience and how these barriers impact consumer innovation resistance. Thus, more research is needed in this context to address this gap in the marketing literature. Accordingly, this paper attempts to review the existing literature to identify the positive and negative influences of digitalization on organizational resilience.

Therefore, this study addresses the following research questions to explore the impact of digitalization on organizational resilience:

RQ1. What are the theories and constructs examined in previous studies of digitalization and organizational resilience?

RQ2. What is the impact of digitalization on organizational resilience?

RQ3. What are the benefits and barriers of digitalization? and, how to overcome these barriers and accordingly, build organizational resilience?

Literature Review

Digitalization

Data provide a shared understanding of customers while marketers consider it a competitive advantage (Erevelles et al., 2016). Thus, Data science emerged to capture, create, analyze, and use big data streams (Johnston & Pattinson, 2016). Digitization is defined as the process of converting analog data into digital data sets and is regarded as the basis for digitalization, which is defined as the utilization of digital opportunities (Rachinger et al., 2018). Digitization enables information to be directly stored, accessed, shared, and processed through digital routes, devices, and networks (Ng & Wakenshaw, 2017).

Accordingly, Firms need to acquire digital resources and associated technologies, to store data, information, and communication to compete successfully in the digital era (Verhoef et al., 2021). Digitalization is defined as the adoption or increase in the use of digital technology by an organization, industry, or country (Brennen & Kreiss, 2016). It allows firms to use digital technologies to optimize current business processes by approving more efficient coordination between processes, or by creating added customer value through improving user experiences (Verhoef et al., 2021).

Raddats et al. (2022) introduced the concept of digital service innovations (DSIs) specifically, innovations in manufacturers' service offerings by using digital technologies that create value for manufacturers and customers.

As stated by (Mazzei & Noble, 2017), there are three levels of value creation due to big data trends first, data as a tool, second, data as an industry and third, data as a strategy. For instance, Amazon.com created Amazon Dash to engage its customers which is a device that can be attached to one of the products chosen by a customer and allows the customer to reorder the product by just pushing the

button (Venkatesan, 2017).

The application of digitalization and artificial intelligence (AI) decision-making is developing, and impacting virtual communities in digital environments, particularly in the B2B context (Ritter & Pedersen, 2020).

Digital collaboration capability, which refers to a company's ability to share and coordinate information with partners via digital channels, is one of the primary organizational capabilities that helps companies gain differentiation advantages (Li et al., 2023).

Liu et al. (2011) defined digital transformation (DT) as “an organizational transformation that integrates digital technologies and business processes in a digital economy”.

More recently, (Verhoef et al., 2021) identified three phases of digital transformation digitization, digitalization, and digital transformation.

On the other hand, Digital transformation impacts the entire company and the ways of doing business and goes beyond digitalization. It restructures the processes to change the business logic of a company (Verhoef et al., 2021). Digital transformation DT is defined as a process where digital technologies play a vital role in the creation as well as the support of disruptions taking place at both societal and industrial levels (Vial, G., 2019). There are two identified dimensions of digital maturity: digital intensity (DI) and transformation management intensity TMI) (He et al., 2023).

In fact, digital technologies can create new prospects for business-to-business firms and help them to develop the service experience since B2B interactions include various forms of touchpoints with different actors such as the supplier, the customer, and other partners (Homburg et al., 2017). Accordingly, service dominant S-D logic, service-ecosystems focused on value co-creation, and integration of dynamics and institutions that affect, and are affected by, interactions among multiple actors (Barrett et al. 2015).

Likewise, supply chain inventories could generate essential data that companies can turn into intelligence through analytics via POS, GPS, RFID to social media

feeds; for instance, Amazon and Walmart utilized well the power of big data analytics (Sanders, 2016).

Accordingly, the B2B customer journey can be examined as a set of relational processes to meet the customer's business needs (Witell et al., 2020). Customer impact on innovation is generally focused on the demand for new products or market demand (Barrett et al. 2015). Meanwhile, recent technological innovations started in the 2010s; for instance, mobile advancement, social media, or analytics led to a digital transformation in the company's business model. At the same time, customers' accessibility to any information through the internet increased, and they had more control over multiple alternatives to make choices (Rachinger et al., 2019).

Guided by digital transformation, innovation is no longer a linear process but one where the user gets back to the producer regarding what innovation is needed (He et al. 2023). Moreover, there is a need to examine the impact of digital transformation on developing economies as it has not been explored in depth as much because there are disparities about access to infrastructure and knowledge required to sustain a digital economy as many developing countries depend on the manufacturing segment as the main driver of these countries' economy (Feliciano-Cestero et al., 2023).

Several papers focus on how digital technologies can help to develop innovative services and new digital business models (DBMs), which are required to capture value and guide customers to a diverse product factor, such as how products are used and solutions for better utilization. The ability to remotely monitor equipment leads to so-called smart services, developed through networking and the management of connected devices (Raddats et al. 2022).

Organizational Resilience

Bruneau et al. (2003) defined resilience as the ability of a system to reduce the chances of a shock, to absorb that shock if it happens, and to quickly recover after a shock. Resilience has an organizational dimension which refers to the capacity of

an organization to manage a disturbance to its environment and to develop a new pathway and, a territorial dimension which refers to the collective capacity of the actors to contribute to facilitate the development of territorial responses to external disturbances (Gilly et al.,2014).

Meanwhile, organizational resilience is frequently combined with dynamic capabilities such as the ability to adapt, integrate, and rearrange resources to deal with changing conditions (Wulandhari et al.2023). Initially, resilience is described as a learning process that started from adapting to disruptive environments to constantly developing the ability to overcome future threats and crises (Bruneau et al., 2003).

Scholars identified two dimensions of organizational resilience: planned and adaptive. Planned resilience happens pre-disaster, whereas adaptive resilience occurs post-disaster and requires leadership, external linkages, internal collaboration, an ability to learn from past experiences, and staff well-being (Prayag et al.,2018).

Duchek (2020) presented three successive resilience stages: anticipation, coping, and adaptation, building on process-based studies.

He et al. (2023) identified three different perspectives to interpret organizational resilience: reactive, adaptive, and transformative.

A study examines the organizational resilience of a retail supermarket chain in China during the COVID-19 pandemic. The results stated that supply chain and digital construction, spontaneous ability, system management, and corporate social responsibility played a useful role in the organization's response to the COVID-19 outbreak (Yang et al.,2021).

Moreover, supply chain resilience is regarded as a reactive measure and can be achieved through collaborative action, for example, sharing problem solving with suppliers and developing business plans that are enduring in case of a disruption to speed up the recovery of the supply chain (Kokkinou, 2023). Additionally, organizational resilience can be viewed as an outcome or a process; resilience as

an outcome states the organization's ability to recover from unexpected and stressful situations as a result of dynamic interaction between the organization and environment, whereas resilience as a process reveals the actions of organizational actors when responding to an exogenous shock (Nielsen et al., 2023).

Consumer Resistance

The factors that determine consumer resistance include innovation characteristics, the perception of innovation characteristics propagation mechanisms, and opinion leaders' influence (Cornescu & Adam, 2013). Innovation is defined as any new idea, practice, or object that is perceived by individuals to adopt, and there are five characteristics determine an innovation's adoption rate: relative advantage, compatibility, complexity, trialability, and observability (Rogers, 2002).

The consumer resistance to innovation postulates three forms direct rejection, postponement, or opposition (Cornescu & Adam, 2013).

Though, resistance to change is defined as any behavior that serves to maintain the status quo in the face of pressure to alter the status quo (Mani & Chouk, 2018).

Eventually, customers come across barriers that affect their desire to adopt innovation these barriers not only functional such as product usage pattern, product value and risks related to product usage, but also psychological barriers occur due to customer's traditions and perceived product image (Ram & Sheth 1989).

Accordingly, there are some potential risks and barriers to the use of digital technologies in firms that can be categorized into three dimensions the first is the cultural dimension to increase employees' awareness and interests in digital technologies, the second is organizational competence and technology, and finally, the relational dimension to increase collaboration and long-term relationships among the actors' network in digital transformation (Pascucci et al., 2023).

To summarize, organizations will continue to promote digital technology innovations to build resilience, but to date, researchers have mainly focused on the facilitators of adopting digital technology, and few studies have mentioned digital technology barriers. Accordingly, more efforts are required to investigate barriers to innovation

and how consumers resist adopting these technologies and to determine the reasons for resistance to build organizational resilience. Thus, more research is needed in this context to address this research gap.

Conceptual Framework

The production and marketing functions do not depend entirely on the organization; an important factor to consider is the consumer acceptance or rejection of the new product (Cornescu & Adam, 2013).

To date, digital technologies, including the Internet of Things, robots, business models, big data, and predictive analytics, suggest that the shopping process revolutionized retail settings. Yet, consumers still need a drive to make purchase decisions (Grewal et al., 2017).

He et al. (2023) stated that investment in strategic technology helps organizations to develop systematic control and sustain operations in crises but may not directly contribute to employees' capabilities to understand external chaos, actively seek available resources, and rapidly develop adaptive solutions.

However, Digital Technologies might be regarded as sources of disturbance as there are three types of disruptions identified in the literature: consumer behavior and expectations, competitive situation, and availability of data (Vial, 2019).

Additionally, digitalization allows firms to use digital technologies to enhance business processes through the coordination between processes and customer value creation by enhancing customer experience (Verhoef, et al., 2021)

Organizational resilience is related to the organization's ability to absorb, adapt to, and take advantage of any disruptive events and crises as it involves three characteristics: perception, integration, and reorganization (Zhang et al., 2021).

Whereas digitalization can cause some challenges and barriers for an organization to become more resilient. Resistance and adoption can both happen during the time of innovation and can be explained by similar factors (Mani & Chouk, 2018).

For instance, some significant challenges might face firms related to the use of digital tools such as employee's talent, knowledge, and capabilities to effectively

use digital technologies, firms might not be able to train employees well, and other factors related to human psychological factors (Feliciano-Cestero et al.,2023).

The twofold goal of organizational resilience is the capacity for resistance and adaptation thus opening new directions. These paths indicate an organization's capacity to find innovative responses to new queries and not simply replicate previous organizational responses (Gilly et al., 2014).

He et al. (2023) states that digital maturity has a positive effect on organizational resilience (OR), which in turn has a positive effect on organizational performance. Accordingly, there are different perspectives on the relationship between digitalization and organizational resilience and how digitalization can influence organizational resilience.

Based on the previous discussion, the first proposition, P1: There is a positive relationship between digitalization and organizational resilience.

Thus, the second proposition P2: There is a negative relationship between barriers of using digital technologies and organizational resilience.

In marketing literature, consumer response to innovation has been categorized into two research models: the first innovation adoption, and the second resistance to innovation (Mani & Chouk, 2018).

Technology acceptance model (TAM) is an adaptation of the theory of reasoned action (TRA) that was mainly considered in modeling user acceptance of information technology (Lee,2009). Similarly, theories used to explain innovation adoption include the technology acceptance model (TAM) the theory of planned behavior (TPB) and the unified theory of acceptance and use of technology (UTAUT) (Mani & Chouk, 2018).

According to the theory of planned behavior (TPB), an individual behaves in a certain way based on his/her behavioral intention which is determined by attitude, subjective norms, and perceived behavioral controls (Lee,2009). Previous literature stated that innovation resistance theory (IRT) had been used to study the resistance towards innovation, as existing theories, unlike the technology

acceptance model (TAM) and diffusion of innovation (DOI), did not examine the barriers towards innovation (Verma et al., 2023). Scholars and practitioners have come to agree that the most cited theory in resistance literature is the innovation resistance theory (IRT), which determines usage, value, and risk barriers as functional and traditional and image barriers as psychological barriers to innovation (Talwar et al., 2023).

On the other hand, the decision to reject an innovation is not described by the same factors that explain adoption (Mani & Chouk, 2018). The resistance to innovation is shown in the user's denial, rejection, or postponement of new innovative products or services (Kautish et al., 2023).

The most cited theory in resistance literature is the innovation resistance theory (IRT) which determines usage, value, and risk barriers as the functional and traditional and image barriers as the psychological barriers to innovation (Talwar et al. 2023). Whereas TAM model theorizes that behavioral intention to use is influenced by user's attitude toward the system and perceived usefulness of the system. In addition, user attitude and perceived usefulness of the system are affected by perceived ease of use (Lee, 2009).

An important issue is how consumers relate to innovation regarding the usage barrier, which is the most common reason for consumer innovation resistance, as changing repetitive customer practices or habits requires developing a long process before achieving customer acceptance (Ram & Sheth, 1989). Furthermore, the usage barrier relates to the difficulty a user challenges in understanding and using new technology as the complexity degree of an innovation controls the strength of the resistance it may cause during the adoption process (Kautish et al., 2023).

Whereas a value barrier is a functional barrier based on innovation value, if that alternative does not offer robust performance to price value compared to current market offerings, there is no drive for a customer to change (Ram & Sheth, 1989). More recently, the value barrier was defined as the resistance that arises because

of the discrepancy between innovation benefits and its attached cost (Verma et al., 2023). Consequently, it is regarded as a significant barrier to consumer innovation acceptance specifically, considered a key factor in innovation resistance studies (Kautish et al., 2023).

The risk barrier represents the perceived uncertainty and consumer concerns about innovation that cannot be predicted (Ram & Sheth, 1989) For instance, the risk barrier in telemedicine apps is dependent on the user and specific context (Kautish et al., 2023).

Furthermore, psychological barriers involve tradition and image barriers, tradition barrier explains the cultural changes that influence the customer due to innovation, in the same way, image barriers are concerned with product class, industry, or country of origin (Ram & Sheth, 1989).

Accordingly, resistance could be either active or passive; active resistance arises due to direct experience of innovation structures and is assessed through functional barriers, for instance, usage, value, and risk barriers, whereas passive resistance occurs due to the user's beliefs and contradictions, which can be examined through psychological barriers such as traditional or image barriers (Verma et al., 2023).

Thus, the third proposition P3: In some cases, consumers will not accept the digital innovations but rather reject them in place. So, there is a positive relationship between digital technology barriers and consumer resistance to innovation.

Rogers (2002) stated four main essentials in the diffusion of new ideas which are innovation, communication channels, time, and social systems.

There are differences among individuals' usage and acceptance of innovative technologies including ICT, which is known as the digital divide in fact, prior studies on using smartphones show that social influence is significant for technology adoption (Choudrie et al. 2018).

Despite this rapid expansion of digital channels, it does not necessarily improve service innovation quality and efficacy (Shah & Murthi 2021). For example, a main

barrier to the use of mobile banking in some countries is risk perception, which includes the use of personal information or transfer of money without permission and vulnerability to device hacking (Choudrie et al., 2018). Thus, an innovation's success or failure is contingent on the resistance level among consumers (Ram & Sheth, 1989).

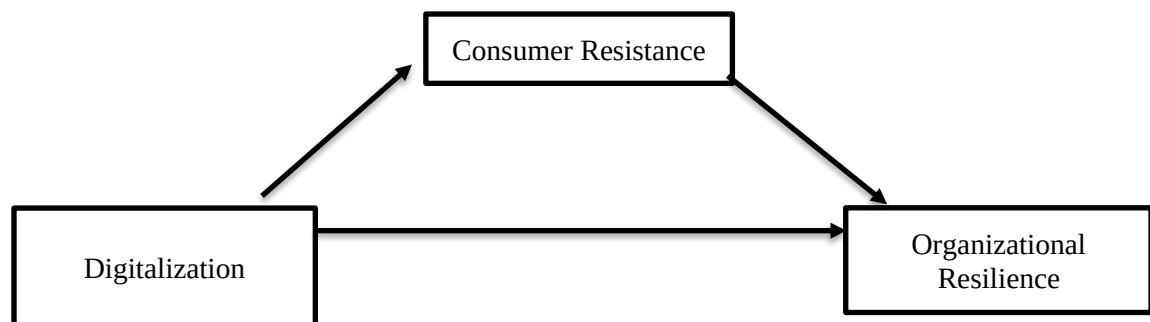
One of the factors used to measure organizational resilience is its ability to absorb an external shock and control it, mainly its capacity for resistance. (Gilly et al., 2014). In the current decade, consumer resistance has been less considered in extant literature in contrast to the adoption of products either in online or offline contexts (Talwar et al., 2023)

Thus, the fourth proposition P4: There is a negative relationship between consumer innovation resistance and organizational resilience.

Hence, the fifth proposition P5: consumer innovation resistance mediates the relationship between digitalization and organizational resilience.

To summarize, the research propositions that describe the relationships between study variables are shown in the following figure (1):

Figure 1. Conceptual model



Discussion

This research examines the way digitalization has been studied in different fields to address how it has been conceptualized across these multidisciplinary fields and identify the main similarities and differences. It also explores the theoretical

relationship between digitalization and organizational resilience (OR) and determines how consumer resistance influences organizations during turbulent times. Thus, this paper clarifies the benefits and barriers of digitalization and explains the factors that make customers either accept or reject the new digital technologies. Regarding organizations, results suggest that overcoming security and privacy barriers encourages consumers to accept these technologies and build organizational resilience. Thus, this study will contribute to research and practice.

Implications

This paper has offered an in-depth overview of studies concerning the digital technologies use, adoption and resistance that can assist scholars to identify possible gaps in this research area.

Previous research studies have revealed a scarcity of research on consumer resistance, as these studies focused mainly on theories of adoption (Talwar et al., 2023). For this reason, theories of innovation resistance are still being considered. For example, research on the adoption, use, and diffusion of mobile banking apps using the technology acceptance model (TAM) has been found to be the most stated theory, followed by the unified theory of acceptance and use of technology (UTAUT) and the theory of reasoned action (TRA) (Choudriea et al., 2018).

Furthermore, this paper attempts to shed some light on digitalization in emerging markets and provides information about the challenges organizations encounter to become more resilient, along with the benefits and barriers of using new technologies.

Given these facts, this study provides guidance to marketers and managers on how to overcome technology barriers and enhance resilience. Even though managers are entirely on board with advanced technologies, they need to determine where digitalization goes wrong in the organization. Thus, to build a resilient organization, managers should provide support, eliminate usage barriers, and deal with privacy concerns.

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Integrating Accounting Information Systems and Marketing Information Systems for Building and Sustaining Competitive Advantage

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Abstract:

This paper aims to bridge an evident research gap in theory and practice through identifying and integrating important interfaces among AIS and MKIS. Little research and professional attention can be argued to be paid to the profitable synergy among the logical design components and implementation tips for highly effective AIS such as costing systems and MKIS such as Customer Relationship Management Systems (CRM). This research will endeavor to achieve such integration through spotting all potential competitive linkages among AIS and MKIS and propose the most competitive methodology to integrate them. It is argued by authors that integrating AIS and MKIS can create and sustain competitive advantage in six different ways; which are: 1- Supporting differential positioning for the organization 2- Leading low cost operations with higher levels of productivity, quality and customer service 3- Supporting market niching strategies 4- Augmenting core accounting and marketing competencies across the value chain 5- Creating synergy among accounting and marketing functions 6- Achieving intimacy with customers, suppliers and distributors.

Introduction and Background

Within prevailing business environment, the challenge of meeting business decision makers' information needs is an overriding and dominant concern. The analysis of the methodologies in which business decision makers and entrepreneurs' information needs should catered for indicate the number of information sources, significant variations in their contents, their timeliness, economy and they are supposed to be utilized and get incorporated in the business decision making process. The complexity of such context and the growing efforts to present innovative information systems as comprehensive, accurate, time-sensitive, user friendly, economical and relevant for addressing the business decision makers' information needs are the core impetus for emphasizing the binding theme of this paper.

Aim of Research

The main focus of this paper is to spot and subsequently analyze the interfaces among Accounting Information Systems (AIS) and Marketing Information Systems (MKIS), since both support managing the business enterprise by operational and strategic agendas and in the path of their evolution have demonstrated a sharp inclination to highlight internal and external influences on business deliverables and key performance indicators (KPI's). By this token, there is a pressing need for integrating the interfaces of those two most critical and multidimensional systems within the business organization. Consequently, an endeavour was pursued to develop and initially prove the research Proposition that a conceptual and eventually empirical model of integration of accounting and marketing information systems should serve as the foundations for linking activities and operations among both systems while providing adequate augmented information and knowledge support for making more competitively effective business decisions.

Research Methodology

With a view toward attaining aim of this paper, a critical review of relevant literature that covers research investigation of the interfaces and integrations between accounting and marketing information systems with special reference to their tasks, content, quality and synergies will be carried out. Subsequently, a model of reciprocal integration for accounting and marketing information systems will be logically proposed grounded on the analytical perspective on their mechanisms, categorization of the accounting/marketing functions of Business undertakings and the impact of integrated accounting and marketing information systems on building and sustaining competitive advantage for the business enterprise as a whole. Conclusively, based on the discussion and concluding embarks, through an outlook of future integration of mutual interfaces between both crucial information systems in contemporary business enterprises , an empirical testing plan of the proposed model will be articulated for frontiers of future research.

Literature Review

The contributions of business information systems depend on the quality of information as an output that those systems generate. The quality of the deliverables is mainly measured mainly by quality of content and timing of information provided to business decision makers. Furthermore, it is arguably certain that any sort of future Business decision making ought to necessitate that supports a certain kind and level of decisions. As far as basic architecture, all functional information systems are quite similar as manifested by their logical design, layout and content (Turban et al, 2022). Broadly, there for basic components of any business information system; data management (input), data treatment (processing) and information generation (outputs) and quality control (feedback) for business decision making purposes. Accordingly, the accounting and marketing information systems are consistent with those patterns and standards (Baltzan, 2023) Taking into consideration, the

magnitude of business decision makers' information needs, the number and variety of data sources, techniques and technologies of data analysis and how information is reported and to whom among business officials. Nevertheless, in order for a business information system to be visualized and to be effectively devised, it is essential to subsystems with distinctively separated content, and to conduct tasks within such subsystems that should provide high quality contents, while it is a must that the provision of high quality content be financially feasible based on a rational and objective costbenefit analysis (Turban et al, 2022). Irrespective of the industry, markets and line of business of business organizations , they ground their decisions on the structure of their intellectual capital composed of a carefully blended portfolio of functional information systems. The flows of information, which are the outputs of those business information systems enable business enterprises to manage their supply chain and enterprise resources to serve their customers, suppliers, distributors, employees and all other stakeholders (Baltzan, 2023). The core theme of Research of this paper is the integration of accounting and marketing information systems, given that state-of-the-art business philosophies and pillars depend on this integration for overall optimization rather than suboptimization of strategic Business intents. Furthermore, the sense of direction for recent development point of accounting and marketing information systems to the production and maintenance of accounting and marketing information to be used by target users need to be equipped with integrative approach. Thus, the long standing practice is that coverage of relevant data processed by the marketing information system has not been consolidated predominantly by external sources, created outside organizational boundaries. Thus, it makes sense , it is logical that information stored in internal databases as a key component of a marketing information system would be expected to result from several sources including financial records and data mines and warehouses (Kotler et al., 2017). It is long established notion that the accounting function has traditionally been relied on as one these sources, and in order to identify important opportunities and potential problems, marketing decision makers make use

of internal on orders, sales volume, pricing policies, costs, inventory levels, receivables and liabilities (Kotler and Keller 2012). On the other hand, highlighting the need for the content of information offered by the accounting information system to be based on external sources of information about competition, customers and distributors (Simmonds 1981 and Drury 2012) and especially on the business organization's key success factors defined defined from the customers' point of view (Macura and Gajic, 2022), also expresses the crucial need and tendency to converge the contents of accounting and marketing information systems. The portfolio of different approaches to the design and implementation of marketing information system is evidently visible in the literature (Macura and Gajic,2022). The core agenda of the marketing information system is to generate high quality information while communicating with market partners on what is demanded, target market segments, demand and sales forecasts, customers' profiles, needs, buying process and values and the branded market offerings rendered to customers. Contrary to the highly customized approaches to marketing information systems, approached to accounting information systems are fairly uniform in terms of the content they aim to present. These contents are used with a view toward how to prepare a database of accounting information for their users to enable them to make planning and control decisions. From a general importance standpoint, these decisions are instrumental to the effectiveness and efficiency of the use of available resources, and from the point of view of the internal users who are business decision makers and operators at all organizational levels and functions which are relevant to infinite tactical business activities. Due to the precise differentiation of terms, it must be emphasised that there is a controversy that the term accounting information system is treated from the perspective of applying digital information technology to the accounting system (Bagranoff et al., 2010), which will not be adppted by this research, because the focus is on the content and applicability of accounting information systems (Macura and Gajic, 2022). The recurring evidence implies that business information systems evolve with the evolution of management theory and practice and the activities

triggered by such breakthroughs. These activities are the starting point for the content of the accounting and marketing information support provided and the mutual streams of Business information between various functional information systems within business organizations. An integral part of the evolution of business information systems can also be attributed to the importance of the functional areas which a specific business information system belong to.

Research Gap

Although, there is evidently a general awareness of the synergistic interfaces between accounting and marketing information systems in the literature, the argument that without an effective accounting information system, there can never be a rational business information system, with special reference to an effective marketing information system (Macura and Gajic , 2022), there is no adequate research on developing models of integration between accounting and marketing information systems. Additionally, it is a general observation that the integration of interfaces between the accounting and marketing information systems is far from sufficiently emphasised or operationally tapped. For example, out of ten best selling marketing textbooks used for pedagogical purposes, identified through the amazon.com platform, the term "accounting " is used most frequently when referring to the accounting function as integral part of the organizational structure of the business firm. In two textbooks, it is only briefly stated that within the "internal data" , as a subsystem of the marketing information system, data are acquired from the accounting function. In only one textbook, a specific accounting technique is highlighted, namely Activity based Costing as an appropriate accounting methodology adopted to measure integration to estimate costs within each supply chain functional activity (Lamb et al, 2011).

Furthermore, only one textbook (Perreault et al, 2011) offers an obvious view that marketing students should be familiar with the accounting jargon and dedicated a special title in the textbook to present these interfaces . However, the implied

knowledge relates exclusively to comprehending accounting terminology from financial statements perspective rather than relevant internal information for marketing decisions. The status is consistent with leading business journals handling frontiers of marketing theory and practice (Marcura and Gajic, 2022). On the other hand, based on critical and diagnostic analysis of ten best selling management accounting textbooks identified through amazon.com as well, it can be safely concluded that accounting literature with much larger and more peculiar content treats interfaces with all components of internal value chain functions including the marketing function (Bhimani et al, 2019), with the common devising of case studies to demonstrate certain marketing phenomena as well (Garrison et al, 2012, Datar and Rajan, 2018 and Zimmerman , 2017). Although, the accounting literature displays a number of examples that emphasize accounting support for specific marketing decisions and actions along with explaining in detail the management of marketing budgets from the standpoint of their determination and allocation, the accounting literature including high impact journals does not cater for an Integrated model that focuses on identifying and eventually integrating interfaces between accounting and marketing information systems, but makes limited hints to certain analytical potential of synergies in very specific cases (Philips and Halliday, 2008 and Marcura and Gajic, 2022).

Theoretical Model

The theoretical model proposed by the authors is grounded on the principle that integrating accounting and marketing information systems would be expected to have the highest level of synergy and effectiveness if it took place on the level of both systems skeltons. Each business information system skeleton consists of four main levels serving different categories of business decision makers and operators as follows:

1. Strategic level information systems to support top management in making

unstructured decisions.

2. Management level informations systems for supporting middle management in make semi structured decisions and providing support to top management in making unstructured decisions.

3. Operational level information systems that support first line managers and operators in making structured decisions and performing core organizational tasks.

4. Knowledge level information systems that support knowledge workers to equip business decision makers and operators with data and digital capabilities.

The theoretical model developed by authors proposes that:-

A. Integrating strategic level accounting and marketing information systems like Executive Support Systems (ESS), Management accounting systems and data mining and warehousing systems will lead to building and sustaining a competitive advantage that is based on creation of intimacy with important business stakeholders like customers and suppliers in the form of Customer Relationship Management (CRM) and interorganizational systems.

B. Integrating management level accounting and marketing information systems like Management Information Systems (MIS) and Decision Support Systems (DSS) should lead to building and sustaining a competitive advantage that is based on improving synergy among the accounting and marketing functions and augmenting core accounting and marketing competencies across the whole supply chain.

C. Integrating operational level accounting and marketing information systems such as artificial intelligence systems, robotics and Transactions Processing Systems (TPS) should lead to building and sustaining a competitive advantage that is based on cost leadership and differentiation.

D. Integrating knowledge level accounting and marketing information systems should lead to building and sustaining a competitive advantage that is based on a successful market niching with high levels of customization and economies of scale through Knowledge Work Systems (KWS) and Office Automation Systems (OAS).

It's planned by the authors to test the above research propositions through a conclusive descriptive research design that is based on a single cross-sectional data collection design. An adequate non-probability judgement/quota sample of accounting and marketing information systems experts and managers will be selected and targeted for data collection in the Egyptian real estate development industry. Measurement and data collection will rely on a structured questionnaire composed of a blend of interval and ratio scales to measure the interfaces and integrations between accounting and marketing information systems under research. Appropriate descriptive statistics, validity and reliability tests and multiple regression analysis will be conducted for empirical analysis and testing purposes.

Concluding Remarks It's important to point out that building, implementing and maintaining the proposed theoretical model for integrating accounting and marketing information systems to achieve a competitiveness agenda must rely on five key success/failure factors:-

1. The model has to be long term oriented to reveal existing patterns and emerging trends for both functions.

2. It has to be fueled by continuous update of crucial organizational inputs comprising top management orientation, target stakeholders, available resources and past accounting and marketing performance.

3. All organizational levels and activities of both accounting and marketing functions must be involved a down-top development approach and top-down action approach for integrating both information systems.

4. There must be very realistic and objective identification of accounting/marketing interfaces and the most rational and sustainable means to integrate them competitively.

5. There must be varying roles for people, technologies and business mechanisms in integrating accounting and marketing information systems for a specific competitive advantage on case by case basis.

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Artificial Intelligence in the UAE Oil and Gas Sectors: Challenges and Opportunities

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Abstract¹

In the last 12 months specifically, there has been exponential growth in the development, deployment and use of artificial intelligence ('AI') across all industries, and the oil and gas sector has been following this trend. In the case of the UAE, important AI regulatory policies, such as the UAE National Strategy for AI, have been implemented.

Meanwhile, governments and industry are taking bold steps towards decarbonization, looking to economical ways to meet ambitious sustainability targets through improving sustainability across their entire value chain by deploying advanced technologies. Such deployments should be assessed from a legal, governance and sustainability perspective with respect to their challenges and opportunities.

The research considered a benchmarking analysis concerning both upstream and downstream segments of national and international oil companies based in the UAE and respective service providers pursuant to information available from annual reports and interviews. By way of illustration, case studies to be considered shall be related to:

- 1) optimised business monitoring of fuel delivery and respective management of workforce implemented by ADNOC Distribution via AI-backed solution of machine learning models;

¹ The wording has been slightly adapted in relation to the approved abstract, as the benchmarking is not taking place via survey questions anymore due to unavailability of candidates with the required skill in the UAE.

- 2) automated drilling systems to collect from simulations to help the drill operator understand the environment, accelerating results and reducing maintenance and costs implemented by Shell; and
- 3) data centres of cloud solutions to accelerate data analysis and faster decision making on drilling process via AI-machine learning implemented by BP.

Some of the questions to be addressed are: What was purpose of the AI implementation; What benefits have been achieved? How the decision-making process and governance framework would be impacted?

Such study shall benefit and guide the literature, oil and gas professionals, regulators and overall oil and gas stakeholders in their understanding of and the need for further assessment of the complexities of AI. Developers, users, policy makers and regulators will better understand requirements to strategically evaluate the challenges and opportunities associated with AI, in reaching ambitious sustainability targets whilst achieving ground-breaking innovation. In addition, given the global dialogue on AI guardrails, rules and regulations early adopters of new technologies and respective innovators with an appreciation of these risks and opportunities are best placed to benefit from the ability to contribute for the development of such regulations.

From one side, with respect to opportunities, AI technology is an important tool for the development of business as it allows efficient and innovative ways to manage time-consuming, repetitive jobs, and automate huge amounts of data in faster, more accurate and more consistent ways than can be achieved by humans. On the other side, with respect to challenges, AI systems' ability to make decisions and perform tasks can raise issues and concerns about fairness, accountability and integrity which rises the demand for sound ethical governance of AI.

The dynamic development of the 4th industrial revolution ('4IR') in the UAE is empowering oil and gas companies to take better control of their environmental footprint, enabling them to take an active role in achieving sustainability goals.

1. Background, Context, Problems and Propositions

The essential background of this research concerns the effectiveness of governance transformation in oil and gas companies in the UAE, pursuant to certain AI initiatives. Given the unavailability of professionals to carry out the proposed survey mentioned in the conceptual abstract, specific suitable public case studies have been selected and highlighted in detail in the appendix.

In the last 12 months specifically, the growth has been exponential in the development, deployment and use of AI across all industries. The public launch of OpenAI's large language model Chat-GPT in November 2022 sent business leaders reeling and was a source of global disruption. The oil and gas sector is following this trend with increasing POCs, pilots and deployments of diverse use cases for example, optimizing production, predictive maintenance, modelling and predicting oil corrosion risk, Healthy and Safety Environment ('HSE') monitoring, and energy management and emissions monitoring.

In this regard, PwC Middle East (2023) points up that the Middle East are beginning to realise the shift globally towards AI and advanced technologies. They are faced with a choice between being a part of the technological disruption or being left behind. When we look at the economic impact for the region, being left behind is not an option. According to PwC, the Middle East is expected to accrue 2% of the total global benefits of AI in 2030 (equivalent to US\$320 billion).

The UAE is not far from this trend where important AI regulatory policies, such as the UAE National Strategy for AI, have been implemented with the establishment of a dedicated Ministry of AI and the appointment of a Minister of State for Artificial Intelligence in the United Arab Emirates, his excellency Mr. Omar Al Olama.

In similar approach in relation to the UAE AI strategy, Al Dhaheri et al 2019, reinforces that AI could significantly raise the UAE's economic growth rate by 182 billion dollars in annual growth and help to address a wide range of economic and social challenges, ranging from oil prices to rapid urbanisation.

Olama (2023), emphasises that the UAE existing extraction industry already uses modelling software and algorithms to support its operations. As the UAE makes the transition to renewable energy supplies and more efficient water desalination, there is also an opportunity for AI systems to play a fundamental role in energy sector innovation. There is an opportunity to open up this sector to more companies and provide support for proof-of-concept systems developed first in the UAE. The UAE is planning a proof-of-concept to utilize AI systems in order to focus both internally, to make energy saving decisions, and globally to understand supply and demand for oil.

As becomes evident from the identified case studies, a few AI initiatives in Oil and Gas companies is to accelerate procedures due to predictive analysis, machine learning which reflected in considerable efficiency with respect to cost saving and the timeline of decision making. However, those opportunities bring new governance challenges that require attention to ensure they remain within regulatory guidelines.

Pursuant to this background, the overall objective of this research is to contribute to knowledge with respect to the challenges and opportunities of AI initiatives of oil

and gas companies with physical presence in the UAE pursuant to addressing the following propositions:

- 1) What kind of AI initiative has been implemented?
- 2) What are the challenges and opportunities incurred with such initiatives from a governance perspective?

In order to fulfil particular aspects of the above background and objectives, the following research literature review has been developed.

2. Research Aims and Objectives:

Taking into account the background and respective proportions, the overall aim of the research is to contribute to knowledge within the realm of sound corporate governance pursuant to the assessment of AI initiatives of Oil and Gas companies.

Thus, after some preliminary assessment of potentially helpful theories, initial research indicated the Control Theory to be appropriate theoretical frameworks. This theory helps determine knowledge by evaluating relevant empirical research data and obtaining fresh insights relating to corporate governance controls of AI initiatives to accelerate its decision-making processes.

3. Research Relevant Literature

The previous chapter stressed the of AI initiatives in the oil and gas industry which have shown considerable focus on acceleration, efficiency and therefore governance transformation. Based on this perspective, the literature review was based on the Control Theory for the theoretical framework and selection of empirical insights based on selected case studies of oil and gas companies based in the UAE.

a. Theoretical Framework

The theoretical framework(s) provide(s) a grounding base for a consideration of research literature, fulfilment of the research objectives, and importantly, the research design and methodology (Saunders et al., 2023).

With respect to the Control Theory, Miles 2012 defends that it examines self-regulating systems, both mechanistic and humanistic. The theory's central ideas have been around for many decades (for example, Cannon, 1929), but Wiener (1948) is generally attributed with establishing control theory as a distinct body of thought. Control theory has had a major impact on a diverse number of fields, such as management, engineering, applied mathematics, economics, and health care.

Reflecting about such theory and endorsing its importance to AI, Russel (2023) defends that it works when machines are stupid. And if you provide the wrong objective, then you can reset them and fix the objective and hope that this time what the machine does is beneficial. But if machines are more intelligent than humans, then giving them the wrong objective would basically be setting up a kind of a chess match between humanity and a machine that has an objective that's across purposes with our own.

b. Empirical Considerations

A detailed analysis of selected case studies is provided in the Appendix and further considerations set out in the section 4.6.2 (data analysis). It is noted that there is a benefit in common in every selected case study which is related to either acceleration and efficiency which, therefore, might result in governance transformation.

- Opportunities of Governance Transformation

Initially, A. Waqar (2023) reinforces that it is highly useful for accelerating the learning process and improving the applications of the latest AI-based technologies, which are supposed to create tremendous improvements in oil and gas projects. Technological advances are directly related to increasing project productivity.

In similar thoughts, Mittal et al (2023) highlights the following opportunities: (i) speed to execution: apply AI to accelerate time to operational and business results by minimizing latency in decision making and action; and (ii) comprehension of complexity: apply AI to improve understanding and decision-making by deciphering patterns, connecting dots and predicting outcomes for increasingly complex data sources.

In the view of Z. Tekic (2023), oil and gas companies are much quicker to adopt new technologies than to experiment with and change their business models, their AI's primary target (and other digitalization) efforts are to improve efficiency. In practice, that typically means to accelerate processes and reduce risks.

H. Shel (2023), however, stresses that generative AI has a pivotal role in the energy industry in increasing operational efficiency, reducing health, and safety, minimizing emissions and accelerating the energy transition. In addition, he points out that analysis of extensive textual and visual data can improve decision making (e.g. processing well logs and looking at interpreting geological surveys and images to aid an existing optimization of exploration and production decisions and strategies). Finally, he concludes that the energy industry can benefit from predictive insights as they have the potential to prevent equipment failures and drive proactive maintenance which leads to optimised production.

Notwithstanding the above, the overall relationship between Governance and AI is assertively assessed by Moton et al (2021) whereby relevant contributions are noted. He highlights that AI may be a useful way for generating and communicating data and evidence in a way that enables decision makers to better navigate a complex environment.

In his view, a Governance Transformation should require fundamental changes in structural, functional, relational and cognitive dimensions of linked socio-technical-ecological systems.

Moreover, he summarises the following important benefits of Governance Transformation in the context of Ai initiatives: 1) shared and collective understanding of particular systems where AI would ensure that decision makers are well informed and able to override or interrogate AI outputs where needed; 2) governance triggering a transformation process by providing intervention on a particular system by providing quantitate insight to inform decision-making process on which interventions should be prioritised; 3) mitigating agency-oriented regimes by providing transparency on how and by who a change in the decision processes can be enacted.

- Challenges of Governance Transformation

Nonetheless the benefit of the efficiency and acceleration is absolutely needed, it is also important to review empirical considerations on the challenges that such initiatives might bring. In this regard, McKinsey Digital (2023) stresses the following key uncertainties:

- Cybersecurity and privacy concerns are prevalent, notably around data leakage risks and vulnerabilities (including leakage of customer and protected data).
- Ethical considerations surround the responsible use of generative AI, including data governance, justice and fairness, accountability, and explainability.
- Regulation and compliance might affect research into generative AI and its potential applications.
- Copyright ownership and protection of content generated by open-source models remains an undefined issue.
- Environmental impact may increase as training models expend exponentially more computational resources.

In similar thoughts and after carrying out a survey on the subject, DLA Piper Law firm (2023), emphasizes that AI-specific regulatory reform is adding disparate rules to data

protection, confidentiality and intellectual property. Governance frameworks, policies and practices are generally not fit for the AI era. Partner and vendor arrangements also take on a different complexion where demand for innovative AI solutions is so high. Against this backdrop, it is unsurprising that 99% of survey respondents ranked governance as a critical AI challenge. They struggle to define what good governance looks like in their organization. Overseeing AI initiatives to ensure they remain within regulatory guidelines is also a top challenge for 96% of companies.

In connection with the mentioned Governance Challenge, Bolton et al (2023) explains that transformations should be carefully engineered with significant effort to reframe problems. In this sense, transformation should consider: 1) to provide confidence that AI-informed decision is democratically sound; 2) to ensure that AI decision making don't give rise to agency problem by being dependent on private actors who own and operate AI models and infrastructures and the consequences to be considered arising from these breaches.

According to Davenport (2023), the decision making should be assessed and classified in fast and complex decisions, being the first option for those ones that are repetitive and can be subject to analytical approval (e.g. pricing, hiring and inventory). On other hand, complex decisions involving strategics matters should require some time for discussion particularly as they would require independent and diversity of judgement.

Similarly, according to IBM Boards often have limited visibility and authority to assess all possible AI use cases and instead depend on ad hoc, reactive reporting by the business which sometimes lack specialised training on risk or ethics to uncover technology ethics concerns. Consequently, IBM suggests that not only an AI ethics Board should be established but also companies needs to operationalise AI ethical principles with actionable guidance provided by dedicated workstreams about different use cases to ensure that the risk based approach assess the right risks to be escalated to the Board (Gartner, 2022).

From the UAE perspective, and recognising such challenge, Olama (2023) highlights that the speed of developments in AI is a challenge for governance. With vast research efforts

around the globe, it is difficult to ensure this technology is developed in a safe and ethical environment. As governments and leading AI thinkers around the world grapple with this challenge, there is an opportunity for the UAE to learn from the best and collaborate with others to ensure effective governance and regulation of AI, both domestically and internationally.

Given the above considerations, it is evident that AI initiatives can certainly bring relevant value with opportunities bringing efficiency and acceleration towards the decision-making process of oil and gas companies. However, this process requires careful review, and specially control, to ensure that regulatory requirements are met, and complex and strategic decisions are not taken without the sufficient time and diversity that they require.

4. Research Methods & Methodology

4.1. Research paradigm

The planned research is to predominantly use an interpretivist (interpreting the meanings that human actions on governance transformation in connection with AI initiatives) philosophy - so employing a (mainly) inductive approach, with an axiology that examines the small sample of selected governance transformation studies of the most relevant oil and gas companies based in the UAE.

4.2. Research approach

As stated afore, in the main, the research is to employ an inductive approach. It will initially employ an inductive (pattern recognition/explication of selected governance transformation case studies with AI initiatives) approach. This will enable the possibility to confirm/reject and/or further examine and question the appropriately spawned research propositions as previously stated.

4.3. Research strategy

Fundamentally, the research is an archival research exercise. It has drawn virtually all its requires data from archived (electronic and/or physical) repositories.

4.4 Research Time-Horizon

The research data has been obtained from recent news, media releases and overall websites of the selected oil and gas companies. To that extent, the research follows a cross-sectional approach.

4.5 Data Considerations

4.5.1. Data (Cases/Variables) Sourcing, Collection, Ethicality and Limitations

Research Cases

To the extent that oil and gas companies are subject to several types of AI initiatives, the research investigated only those related to acceleration and efficiency of decision-making process of the main oil and gas companies based in the UAE.

Data Sourcing (Identification/Selection of Cases)

Saunders et al, (2023) describe the population as the “full set of cases from which a sample is taken”. Accordingly, in this research the source population is potentially and substantively the most relevant oil and gas companies based in the UAE and public information concerning their AI initiatives towards efficiency and acceleration.

Data Ethicality

With respect to the issue of ethicality, it is appropriate to state that all the collected data is sourced from publicly accessible sources. Accordingly, such data is accessible to and by, all different stakeholders. Thus, no ethical issues relating to data confidentiality and privacy are envisaged.

Data integrity (reliability and relevance)

The research itself is predicated on publicly available media releases of the investigated companies as well as further independent analysis of related digital players in the AI industry.

Data Limitations

With respect to key limitations, the first one to highlight is that all the information is

extremely new and is subject to further analysis by the market.

The second limitation is the sample size which is limited to only the identified 5 oil and gas companies that have provided further details of their AI initiatives to the public domain. Nevertheless, the section of Data Analysis (immediately following) gives some further details as to how these limitations are managed.

4.6.2 Data analyses

Overall, the research employed a qualitative analysis. Based on the data obtained with the selected oil and gas companies, it is evident from that AI initiatives have to accelerate procedures due to predictive analysis, machine learning which reflected in considerable efficiency with respect to cost saving and the timeline of decision making. However, those opportunities bring new governance challenges that require attention to ensure they remain within regulatory guidelines.

As it can be noted from the data extracted from the sample of oil and gas companies, the purpose of the AI initiatives has been mainly to expedite decision-making which is something essential for the industry. It is also noted that a few oil and gas companies have implemented new AI initiatives pursuant the implementation of cloud platforms.

According to KPMG (2018) whilst these technologies are empowering consumers and forcing enterprises to adapt or be left behind, a risk-based approach to data protection assumes greater significance with emerging technologies—including cloud computing which requires assessment on the cloud user organizations which need to balance supporting innovation in the cloud with having a risk-based governance structure that includes policies, procedures, and personnel.

5.0 Findings

Earlier chapters of the thesis set out that its fundamental research propositions towards 1) the type of AI initiatives; and 2) challenges and opportunities of such initiatives from a Governance perspective. The answer to these questions was sought based on the

relationship of the Control Theory with the materiality of decisions.

In that context, AI initiatives that are focused on analytical and repetitive procedures should have a different treatment than those considered complex and strategic one, which are, therefore required to have a greater level of oversight and control which can be in place by different ways depending on the specific corporate culture of the relevant oil and gas company.

In this regard, AI Governance is herein considered not only procedures towards the Board of Directors of oil and gas companies but the overall policies and procedures to ensure ethical considerations surround the responsible use of AI, including data governance, justice and fairness, accountability, and explainability are embedded across the entire decision-making process of oil and gas companies.

6.0 Research Originality and Policy Contributions/Implications

The technology can be an important tool for the development of business as it allows efficient and innovative ways to manage time-consuming, repetitive jobs, and automate huge amounts of data in faster, more accurate and more consistent ways than can be achieved by humans. On the other side, with respect to challenges, AI systems' ability to make decisions and perform tasks can raise issues and concerns about fairness, accountability and integrity which rises the demand for sound ethical governance of AI. The dynamic development of the industrial revolution is empowering companies to take better control of their environmental footprint, enabling them to take an active role in achieving sustainability goals.

Therefore, appropriate and effective policies towards AI governance are key for the development of the market and the appropriate treatment of the overall AI stakeholders.

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Appendix - Summary of illustrative AI Initiatives by key market players in the UAE Oil & Gas Industry

Company	Type of AI initiative	Type of business	Benefit ²
1. BP	Cloud-based geoscience platform using AI. The platform has a string of unique capabilities including specially-designed 'knowledge-graphs'. BP experts feed the platform geology, geophysics, reservoir and historic project information. It intuitively links that information together, identifying new connections and workflows, and creating a robust knowledge-graph of BP's subsurface assets (BP, 2023).	Upstream	Accelerate data analysis and faster decision making on drilling process via AI-machine learning.
2. ADNOC Distribution	Built a more accurate model to predict fuel consumption across each station to ensure operational excellence and maximize efficiency without losing sales	Downstream	The fuel delivery process itself has been automated, ensuring that fuel is delivered from the nearest fulfilment centre. This streamlines the delivery process and reduces wait times for fuel replenishment.
3. ADNOC Drilling	Though drilling and scanning rock samples must remain manual processes, image classification is now much faster and more automated. Because Watson can analyse 527 images per second, analysing all of the samples taken from a single reservoir now takes only minutes—not months (IBM, 2023).	Upstream	Image classification is now much faster and more automated. The newly built models reduced inventory loss from 0.8% to 0.12%, the scale of which translates into tens of millions in revenue gain
4. TotalEnergies	The Digital Factory implemented by TotalEnergies brings together around 300 developers, data scientists and other digital specialists to develop digital solutions to optimize our industrial resources (environmental impact, availability and costs) and offer new services to customers.	Upstream	For example, the "E" digital solution provides a real-time estimation of energy consumption by the different equipment in a drilling rig, along with the related greenhouse gas emissions. The solution was deployed on the Maersk Voyager 1 in 2020, resulting in fuel savings of around 7% and 1,000 tons of reduced CO2 emissions over one year. "E" was deployed on two additional rigs in 2022.
5. Shell	The fundamental principle behind the OSDUTM platform is that it is "open" and provides a level playing field and a more accessible marketplace for vendors. With cloud-based storage, data lineages and audit trails are clearer, and it becomes easier to manage data entitlements and obligations and to control access. For situations where data movement is restricted, local implementations of the OSDUTM platform can retain data within their country of origin, with only meta data (tags that indicate the existence of the data) being available to users beyond that geographical region. (Shell, 2023).	Upstream	Benefits from cloud-based data and workflows: • better and faster capital investment decisions; • asset teams can more easily optimise the operational performance of existing fields; • delivery of higher ultimate recovery of hydrocarbons by helping find bypassed zones in existing reservoirs; and • interpretation teams identified potential efficiencies as they can concentrate on high-value activities rather than mundane aspects such as transferring and version checking of data.

Role of Artificial Intelligence in Building Intellectual Marketing Capital

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Abstract:

Being in the digitization era, technological tools have taken over in every operative Aspect of major industries. Consequently, even modern management and marketing theories have been challenged from operational Aspects due to the disruption caused by these technological tools. Disruptive technologies comprising internet of things (IOT), big data analytics, blockchain integrated with networking infrastructure, and artificial intelligence have created innovative ways towards data driven decision making thus operation of business. Artificial intelligence (AI) is the umbrella term that describes the effort to mimic human skills and replicate human intelligence with machines. Most modern AI uses a technique known as machine learning. Machines learn from examples in the form of training data used to find patterns and Associations in data and to make statistical predictions. As a result, AI with respect to anticipating consumers' needs by continuous learning will add to marketing capital to more than 20% attained by old marketing methodologies to know hidden 80% of human needs.

There are various implementation tools of the AI. Companies like Google and Spotify use AI platform tools such as IBM Watson, Google Assistant from strategic perspective to build on their marketing capital to serve consumers proactively not merely just in time. Recent survey via MIT Technology Review Insights 2020 version clarified that AI is the priority technology for sales and marketing functions with 24% of US companies already using AI and 60% expected to use it by 2022. According to Valvic,B.

Corbo, L. Costa e Silva, S. and Dabic, M.(2021) various journal including European Journal of Operational Research and Marketing Intelligence and planning, and a lot more have discussed role the evolving role of AI in marketing. Moreover, it is clarified that AI is an integral part on the macro-marketing level for the client benefit.

Reviewing relevant literature critically, academic and practice gaps have been identified for role of the artificial intelligence to capitalize on the marketing function. Firstly, for the Aspect of academia artificial intelligence has been mostly discussed as a concept of defense in terms in negating replacement of the human function from the knowledge management theory. Secondly, from the industrial operative Aspect, AI has been mostly elaborated within various tools of the disruptive technologies aiding in Assessing intrinsic human needs. Suggested paper will examine role of the AI within stochastic marketing. Stochastic marketing is relatively new term investing in the capital for digitized marketing area. It embeds real time interaction with customer based on AI online and offline simultaneously. In other words, synchronization of marketing models with artificial intelligence system in real time. Research findings are expected to argue for a value-added model that will involve synchronized human expertise and artificial intelligence technology execution.

Introduction

Being in the digitization era, technological tools have taken over in every operative aspect of major industries. Consequently, even modern management and marketing theories have been challenged from operational aspects due to the disruption caused by these technological tools. Disruptive technologies comprising internet of things (IOT), big data analytics, blockchain integrated with networking infrastructure, and artificial intelligence have created innovative

ways towards data driven decision making thus operation of business. Artificial intelligence (AI) is the umbrella term that describes the effort to mimic human skills and replicate human intelligence with machines. Most modern AI uses a technique known as machine learning. Machines learn from examples in the form of training data used to find patterns and associations in data and to make statistical predictions. As a result, AI with respect to anticipating consumers' needs by continuous learning will add to marketing capital to more than 20% attained by old marketing methodologies to know hidden 80% of human needs.

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Reviewing literature review, a business and academic gaps have been identified for role of the artificial intelligence to capitalize on the marketing function. Firstly, for the aspect of academia artificial intelligence has been mostly discussed as a concept of defense in terms in negating replacement of the human function from the knowledge management theory. Secondly, from the industrial operative aspect, AI has been mostly elaborated within various tools of the disruptive technologies aiding in assessing intrinsic human needs. Suggested paper will examine role of the AI within stochastic marketing. Stochastic marketing is relatively new term investing in the capital for digitized

marketing area. It embeds real time interaction with customer based on AI online and offline simultaneously. In other words, synchronization of marketing models with artificial intelligence system in real time. Results will introduce an added value model that will involve synchronized human expertise and artificial intelligence technology execution to achieve intellectual marketing capital

Literature Review

Artificial Intelligence

Tsui, E. Garner, B.J. Staab, S. (2000) stated that artificial intelligence (AI) researchers are considering knowledge management techniques clarifying they aren't distinctive from AI concepts. Knowledge management regards the goals of the organization. Knowledge management is engineering knowledge for establishing strategies on micro and macro organizational levels. There is no comprehensive artificial intelligence system that can replace human intelligence. AI techniques are used in various business core functions that include user profiling methodologies, user personalization of interaction between human and computer, content creation and management, and retrieval of information which are core to marketing capital.

Jarek, K., Mazurek, G. (2019) clarified that origin of artificial intelligence (AI) is information technology usually named automation or robotics. Reference to Oxford Dictionary (2019), AI is "the theory and development of computer systems able to perform tasks normally requiring human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages" The technology used in artificial intelligence can simulate some cognitive attributes similar to the human brain including problem solving. Consequently, AI can process specific data to execute specific tasks defined as narrow intelligence carrying out specific tasks. Prior authors added current capacity for the intelligence of AI is limited in specific areas and tasks performed within machine learning, deeplearning, and natural language processing.

Machine learning is concerned with role of the algorithms used in AI; it comes with a package of pattern identification, systems modeling, predictive analysis, and data analysis.

Artificial Intelligence in Marketing

Mariani. M. Perez-Vega, R. Writz, J.(2021) clarified that marketing and AI support in the decision of the consumers from a behavioral perspective. Equally, using big data is also considered a chance to comprehend consumer behavior. Moreover, research showed that using predictive technology enhances probability of predicting consumer demand. Another AI builds on marketing automation to attract customers, create and retain relationships with customers. Marketing automation utilizes active and passive methods of knowing about current consumers. Active means comprises direct interaction with consumers whereas passive means utilizes data and analyzes information accordingly to create consumer profiles.

(Vlačić, B. Corbo, L. Costa e Silva, S. Dabic, M. 2021) added the technological evolution in marketing enticed organizations to explore deeper technological enhancements for studying consumer behavior thus identifying needs and delivering better offers. Current area of research for marketing examining the outcomes and the application of various technologies aiding marketing performance. Recently, research has been focused on the hybrid integration between AI and marketing. There are calls for research enticing identification of AI roles in marketing. Calls are supporting the aspect that AI tools are computational which is different from previous ideology of considering AI to be limited to machinery.

Stone, M. Aravopoulou, E. Ekinici, Y. Evans, G. Hobbs, M. Labib, A. Laughlin, P. Machtynger, J. and Machtynger, L. (2020) also added that the definition of Marketing AI as “the development artificial agents that, given the information they have about consumers, competitors, and the focal company” suggest a

hybrid integration between marketing discipline and artificial technological tools. From a strategic direction, AI is integrated in marketing of innovative companies like Google, Rare Carat, Spotify, and Under Armor and technology companies providing AI based platforms like Microsoft Cognitive Services, Amazon Lex, Google Assistant, and IBM Watson. Such coupling enables marketing team to work marketing forecasting and automation; in addition, it increases customers' interaction through innovative marketing channels. Artificial intelligence has been identified as rising influential technology for business, with growth from \$10.1 billion in 2018 to \$126 billion by 2025.

The impact of artificial intelligence usage of tools in marketing practices is also reflected in research, with impact from 2017 onwards. After two decades from 1980s, research among industry practitioners and researchers include three main aspects: the development of Big Data; the scalability of the computational power, and the enhancement of AI techniques and technological platforms. Artificial intelligence coupling with marketing discipline enables new strategic directions like personalization, customization, and association with high end, luxurious brands. Also availing premium brands through e-commerce platforms enabled large market size. Progressive development of artificial intelligence directly impact marketing strategies creation. The strategic direction is aligned with market opportunities through AI tools.

Verma, S. Sharma, R. Deb, S. Maitra, D. (2021) tackled the aspect of the implementation of AI in the marketing context. Implementation of AI based marketing innovative solutions have improved business model decision making, new product creation, communication, pricing, customer sales management and customized mobile branding strategies. Also, various services of AI including analysis are sources of innovation creating a cost leadership edge strategy. For service tasks that depend on learning data behavior (new markets or new services and personalization), a quality leadership edge is pursued via thorough analysis of AI. For services that depend on experiential learning such

as customers' interaction, a relationship advantage is targeted through perceptive type of AI algorithms.

Literature on AI and marketing calculates performance via two separate aspects. Firstly, methodology of AI tools and algorithms targeting performance compared with conventional tools and methods. Such a comparison is valuable in attaining higher accuracy versus higher cost trade off via conventional methods. AI, through its technological algorithms are prerequisites for its development. Continuous development enables high performance in nonlinear relationships between input and system output. Secondly, contribution to performance competitive advantage efficiency, sales performance and value retaining for customers.

They added that companies can translate big data into knowledge since it benefits from AI algorithms creating efficient marketing models and enhanced sales strategies. This directly impacts competitive advantage by using AI aligned marketing tools; consequently, customers' behavior can be predicted. AI impacts companies' sales volume, processes and accordingly performance. Besides current performance, companies can use AI to forecast trends and changes of consumers' behavior in demand. Forecasting future trends is executed via AI development tools like "the Adaptive Neuro Fuzzy Inference" system and the modular "genetic fuzzy" forecasting system.

Ma, L. and Sun, B. (2020) confirmed that AI will continue to change marketing executive processes in the digital and advertising platforms, social media engagement, mobile tracking and online customers' transactions as well as offline shopping experience. Artificial intelligence algorithms entice technology powerhouses like Google, Amazon, and many marketing technology companies. Machine learning has enforced major trends in marketing, which created challenges to drive the evolution of both machine learning and marketing methodologies creating a dual feedback loop.

Mustak, M. Salminen , J. Plé , L. Wirtz, J. (2021) discussed that Internet, social platforms and advanced mobile devices have increased the interactions between companies and consumers via information embedded in rich media formats like texting, imaging, and video. It is crucial for firms to understand customers' preferences and get brand positioning information based on the media content. Moreover, designing informative and interactive content to develop awareness, brand positive effect, and consequently brand liking. Although media content is natural for humans, it isn't for machined. AI tools built on machine learning algorithms can generate insights and propose solutions in an engaged interaction and rich media with high scalability.

Marketing effectiveness is measured by the ability to create personalized consumer appealing experience. Engaging rich data and digital channels ease personalized experience to offers; moreover, machine learning tools are work on a highly scalable large content targeted to a highly personalized experience. Segmentation operates on highly precise microsegments which directs behavioral data consequently personal preference creating personalized consumer experience. For example, brands pages followed on Facebook, any search on Google, installed applications on cell phones are incorporated into segmentation. Continued enhancement leads to a more personalized experience, where each customer prefers a unique segment by receiving customized offerings based on individual profile.

Jain, P. Aggarwal, K. (2020). discussed the extending customized offerings, preferences are continuously changing. Efficient targeting not only matching the right offer to the right consumer, but also delivering on time and in the correct context. Personalization targeting is driven by machine learning algorithms and continuous enhancement practices drive evolution. Marketing environment has been always exceeding the scope of human analysts through intuition and manual capacities. Segmentation and consecutive customer engagement make it crucial to enhance and speed up the path. Moreover, adding marketing

strategies more multiple segments makes targeting possible. Since target is automation, hundreds of sub segmentations are required and real time engagement and response; for example, a limited time window exists to deliver an offer. Automation and real time optimization are the pillars of modern marketing via machine learning algorithms.

Companies are taking the entire personalized consumer journey from a holistic view. Digital technology enables gathering specific detailed customer information which changes the view of the purchase cone from the company's perception to the view of iterative decision journeys with continuous feedback iterations of individual consumers. Drawing complete frame of the consumer journey is valuable for firms to retain consumers and gain enhanced competitive advantage in the market. This is also achieved by collecting timely and right information, to provide services and offerings at the correct context. In addition to targeting consumers through specific initiatives, organizations can extend to target longer term strategy to include the complete journey. For example, pushing a customer via creating the awareness, personalized exposures to any of the company's promotions via advertising would create targeted impact.

Looking forward through the complete customer journey, more exposure to detailed customer attributes is further achieved by digging deeper through deep learning and reinforcement learning algorithms. This enables firms to articulate decision making of the customer journey. While customers search of specific product, companies can monitor content generated from platforms to predict or shape the demand. A holistic view of the customer journey helps create targeted programs to accompany customers through purchasing phase.

When executing the program, the firm monitors the actual endpoints and channels assessing real time and adjusting accordingly to customer needs consequently creating conversion. Post conversion, real time engagement continues to ensure delightful customer experience, positive impact and

communication, and optimal value. Machine learning algorithms play a crucial role in managing customer decision making journey, which would attain marketing excellence.

Rekha,A. Abdulla, M. Asharaf, S.(2016) explained that due to AI, marketing mix decision making is shifting from qualitatively to quantitatively. Pricing strategy decisions, channels, and location decisions are made using dynamic quantitative models. Moreover, e-commerce is taking advertising to a digitized and personalized shape. Machine learning algorithms underlie various e-advertising tools and services, targeting customers based on profile features and behavioral analysis in real-time taking decisions in milliseconds. Product advertisement creative designs used to be conducted via qualitative measures; however, having machine learning algorithms for assistance, hybrid decision making strategy is created accelerating the transition.

Bag, S. Gupta, S. Kumar , Sivarajah, U. (2021 urged that companies focus on consumers' decision journeys; intelligent bots help consumers' interaction alongside to enhance experience. When customers browse online websites, targeted advertisements are delivered through bidding systems and automated web pages created using AI algorithms assisting in targeting customized information and generate personalized interest. When customers visit physical stores, sales applications generate analysis to assist in delivering personalized experience, and AI tools such as augmented and mixed reality and virtual fitting rooms enhance shopping experience.

After purchase operation is complete, automated following up for the offer usage maintains customer interaction and loyalty. Machine learning algorithms identify customers' preferences from the pool of online data and assist in providing engaging content to direct attention. Powered by complex AI engines in the cloud, virtual agents such as Amazon Alexa reply to customers' voice queries to provide information or performing purchase transaction. Chat bots

enabled by AI algorithms represented in speech recognition and natural language processing addressing pre and post purchase phases inquiries.

Through the entire customer journey process, AI driven innovations are re-adjusting customers' interactive means hence practices. Google conducts various search techniques via the deep learning based Rank Brain algorithm. It aids in identifying relevant results and robustness of the results. From marketing capital perspective (building on content), engine enhancement is done via the machine learning algorithm such as Can I Rank or the Alli AI. Keyword is well known in the traditional form of online search, machine learning tools and engines are operating on other content models. For example, voice detection and recognition, natural language processing, and text to speech conversion, conversation analysis technology tools such as Dialogflow can detect voice search. Also, other engines like Synthetic's style intelligence agent can enable visual search.

Suggesting the appropriate products to prospected consumers can elevate marketing efficiency hence marketing as a capital value is also elevated. Recommender systems works on machine learning algorithms whether itemized or content related filtering. Their accuracy and robustness have increasingly improved optimization of newer versions of algorithms, e.g. matrix factorization. Recently, deep neural networks have been optimized to improve performance. Data analytics of millions of customers coupled with the choice of products to calculate matching percentage, recommender systems are major attribute in marketing. As a result, products and consumers are successfully matched digitally.

Nair, K. Gupta,R. (2021) illustrated that using digital marketing channels and endpoints (mobile phones, laptops, touchpads) engagement comes the crucial need to achieve successful conversion rates via purchase. the. In older era, conversions were performed using simple techniques like the touch because it

easier to be done however it isn't a real conversion rate. Companies are currently shifting to model conversion based methodology. Starting with logistic regression to further advanced classification models, various sophisticated classification models and PGMs, a wide range of machine learning algorithms are being updated and adopted to provide accurate feedback reflecting true performance of the targeted consumers and providing as well feedback loops for the digital channels.

Marketing Capital

(Kortam, W. Mourad, M. 2011) elaborated on using knowledge based marketing as a competitive advantage for creating and sustaining intellectual marketing capital. This comprises the identification and analysis of current marketing knowledge associated with the consecutive planning monitoring and control outcomes to develop marketing knowledge. Competitive advantage is built on assets to achieve the firm's organizational marketing goals. The process for generating market information and its suggested transformation into intellectual marketing capital is achieved via knowledge based intelligent marketing system as a holistic management context and framework coupled with automation and AI algorithms to create feedback loop.

Knowledge grounded marketing practices are devised to establish an integrated automated system for turning all marketing data into intellectual intelligent marketing capital through integrating human capita and advanced technology hardware and software. It is crucial to create, sustain, and invest in such capital. Marketing knowledge investment initiative leads to designing, developing and maintaining governance and advanced marketing information systems frameworks to achieve the designated and configured intellectual marketing system. Once a tuned integration of the different levels of marketing knowledge is achieved by the four main pillars of marketing intelligence creation and coupling of the marketing research, knowledge economy frameworks,

motivated and capable human knowledge creators and adopted modes of artificial intelligence technology, that marketing knowledge would be the innovate driver to activate the knowledge based marketing system. Converting this knowledge into required versions of intellectual marketing assets for purposes of capitalization, development and calibration into the robust knowledge management and organizational learning systems. Also, a driver to couple and disseminate marketing knowledge through alignment of specialized and motivated knowledge workers for creating, updating, and sustaining intellectual marketing capital; accordingly, making it an integral part of the accountability system for every member of the organization. To elaborate, since it is difficult to couple marketing knowledge with employees, there should a motivation to record, share and use marketing knowledge achieved in consumer engagement means. Effective motivators include agile organizational culture and knowledge performance related reward systems Firstly, the innovative creation of intellectual marketing capital through knowledge based marketing exits through the recognition and awarding of marketing knowledge-coupled business outcomes. Secondly, it exists in direct relation with determination and development of formal and informal marketing knowledge networks. Thirdly managing marketing knowledge as intellectual capital urges establishing organizational marketing repository through coupling documentation and artificial intelligence tools and technology. Attracting creative developers of marketers, retaining and continuously upgrading them via achieving and agile culture across the organization strategic levels incorporating entrepreneurs and intrapreneurs.

Stochastic Analysis

Pflug, G. (2003) clarified that stochastic models are present in various industries; for example, modeling process for manufacturing production. Inventory systems are stochastic in nature. Marketing models use stochastic models for describing buyers' behaviors and their demands. Moreover, decision

making in context of uncertainty, the target is to minimize cost. So in order to take decision within uncertainty, simulation of the proposed model to provide insights about consumers' behaviors. Accordingly, optimization of models is required continuously. Wagner, U. and Taubes.A (1987) clarified that Empirical findings about customers' behaviors regarding frequently purchase, relatively inexpensive customer products symbolize stochastic behavior. The observation of the customers changed the brand of limonade calculated as 55 percentage of the cases although they clearly stated that it is the most preferred one. Although the decision process is determined, it is deducted there a stochastic probability in the customer behavior.

For considering an accurate measurement of all exogenous variables and an adequate representation of the choice mechanism 'in the consumers' heads' is not possible. The main target of all frameworks is to couple buying decision making process of the consumers as the end result of a stochastic process calculation. This does not infer that one considers the consumers purchasing phase is not known at random but rather deduces the aspect of uncertainty about in the purchase decision making process. Finally, when considering the development of a stochastic marketing model of customer behavior decision making process, it is possible to measure various brand selection statistics (Henry Model). Also, the role of measuring the total switching is to be considered (entropy Model) The Hendry Model also provides a means of identifying market segmentation. This is achieved by putting the assumption that brand specific switching is constant and segmenting the market directly relates to the identification of these segments of brands which describes switching reasonably well.

J. Barquín, E. Centeno, J. Reneses (2004) added that market is represented via conjectural variation approach. The adjustment of operation that companies will entice as response to a price change is assumed to be linear and it could be shown that constrained with some realistic assumptions, the solution via market

equilibrium constraints is equal to the solution of a minimization problem with variables that are similar to classical methodologies however optimized via stochastic analysis. market optimization representation technique by stochastic analysis is to allow the consideration of uncertainty in some of the market factors. The structure of the optimization stochastically is appropriate to fit in the stochastic alignment of the market operations.

Also, prior authors added that five factors of uncertainty can be determined when issue is related to intermediate generation operation includes but not limited to system demand and competence behavior. Any of the factors can be tackled as stochastic with concentration based on a model of tree representation. The stochastic technique for analysis is specifically interesting from a practical aspect. The reason is that it is capable to compute robust decisions for large scale systems and tools providing detailed description of technical characteristic of the system. That determines the frame of the categories of cost functions affecting pricing strategies for consumers and market equilibrium analysis by optimization models and techniques attainable for the stochastic analysis.

Shafie-khah, M. and Catalão, J. (2015) added that the main objective to get the customers' behaviors in advance of the articulation and objectivity of the forecasted information of the market major players. Consequently, various reports have indicating the modeling of the competition in several industries' markets. Most of these models have been presented to measure the uncompetitive behavior of market players by means of gaming mechanisms. Via a stochastic model of gaming mechanism has been provided via statistical reinforcement mode. In a stochastic game methodology, the study of challenging markets via algorithms is complex.

Moreover, network limitations can form locational market strength whereas some reports state that limitations have been associated with the market

simulation. However, there are security considerations have not been represented. One of the main target of the “independent system operator (ISO)” is to ensure security of the data in order to influence market prices.

From the market players’ strategies perspective, in order to target motivates consumers from the ISO’s ideology, the optimized equilibrium points of the markets are achieved via using “security constrained unit commitment (SCUC) and security constrained economic dispatch (SCED)”. From the industrial point of view, to model day ahead and real time markets, creating a multi-layer market model based on stochastic multi agent systems modeling of the behavior analysis of the new market stakeholders. Considering the modeling of decision making of the uncertain behavior of customers and based on their journey, suppliers of the products are determined.

Liu,G. Xu, Y. Tomsovic, K. (2015)added another level of usage of the stochastic analysis in the optimal bidding in the day ahead of the mircogrid bidding mechanism, storage, dispatch mechanisms and price response. The microgrid bidding mechanism synchronizes production for the day ahead prediction and real time marketers minimizing operating cost. The bidding aspect is challenging due to various unpredictable factors included but not limited to day ahead and real time unpredicted behavior consequently determining market pricing strategy.

A hybrid stochastic and robust optimization model is suggested to minimize the expected cost, for example, expected total cost of operation excluding benefit cost for the consumers’ demand. This measurement can be executed via linear programming. The uncertain unpredicted output considered with the day ahead market price is framed via probabilities of the forecasted results while a robust optimization is suggested to contain the unbalanced strength in the real time market considering the uncertainty of real time market pricing. Numerical simulations are also on a core measurement for the microgrid bidding

mechanism and a responsive load clarified the pros of using stochastic optimization, and also robust optimization

Lak, O. Rastegar, M. Mohammadi, M. Shafiee, S. Zareipour, H. (2021) added that using hybrid stochastic modeling and robust optimization modeling for the micro grid bidding issue result in minimizing the predicted net cost and cost of operation excluding the benefit cost of the demand. The buying pricing strategies required for the real time market are considered greater than the day ahead market pricing, whereas the selling prices for production in the real time market are usually lower than the day ahead market pricing. Microgrid bidding is expected to provide maximum profit in the day ahead market. Moreover, real time market prices determination, to a large extent, is set based on unpredictable market conditions making challenging to set its underlying stochastic mechanism. For the mentioned justifications, the uncertainty of the output of the day ahead market price is modeled via justifications determined based on forecasted results; whereas a robust optimization is suggested to limit the instability in the real time market issues taking into consideration the unpredictability of the real time market pricing. Robust optimization model is calculated timely by bidding curves to be inserted to the day ahead market.

Franke, R. & Westerhoff, F. (2011) added the agent based financial market modeling based on the stochastic models related to finance. Invoking the types of trading mechanisms, Stochastic models consist of four factors price classification by excessive buyer's demand; a herding mechanism that enables adjustments depending on the input to the equation. An urgency arises regarding the pricing determination due to incorrect alignment versus marketing demand provided by the consumers. The above infers providing structured stochastic volatility methods in case of returns. The estimated volatile stochastic model is conducted via the methodology of simulated scenarios. Moreover, it is combined with bootstrap and Monte Carlo known methods. Suggested hybrid mechanism found to be measuring matching specific moments in the trading

phase providing satisfactory results. That has been achieved identifying by the stochastic hybrid model to determine the targeted market.

Exploratory Evidence

There is an academic gap in the literature concerned with actual modeling of the artificial intelligence system and the stochastic marketing system in relation to the marketing capital. There is also an industrial gap in activating this artificial intelligence system and stochastic marketing system in order to achieve marketing capital represented in successful conversion rates creating a delightful customer base and achieving high organization profit margin.

Context of the Exploratory Work

Established in July 2021 by The British University in Egypt, the Advanced Marketing Research Centre (AMRC) is dedicated to advancing marketing theory and practice in all its dimensions, with a strong focus on knowledge based marketing. AMRC's mission is to provide a comprehensive range of community services in marketing, including training, consultancy, and sponsorships by establishing long-term partnerships with suitable local and international governmental and non- governmental organizations to initiate and execute relevant advanced marketing research projects, publications, and events and branding. AMRC will be base center of excellence for stochastic marketing system derived from its core strategy and mission. AMRC has gone through great partnerships on local and international levels achieved in a very short period required for branding of all kinds. The National Council for Artificial Intelligence (NCAI) followed by the ministry of Communications and Information Technology (MCIT) acts as the main delivery arm of Egypt's AI strategy to serve the region providing expertise, methodology, and tools to help governments and businesses of the ecosystem benefit from Artificial Intelligence in the digital transformation efforts. Its AI projects' areas of applications include agriculture, greenhouse, and fisheries management, healthcare chronic disease

management, infrastructure and manufacturing tracking and predictive maintenance to enhance public safety forecasting traffic flow and intelligent planning. Also its includes economic development by analyzing large scale data to determine right mix of economic activities. NCAI has established international industrial, academic, and world international bodies to execute Egyptian AI strategy. Amazon Egypt is one of the technical leads in AI implementation of digital transformation infrastructure and studying behavior of a wide range of customers. The marketing capital initiating brand value has been impacted by the AI behavioral analysis of the digital infrastructure. Amazon main strategy is cutting costs and excellence in serving customers. The behavioral analysis provided by the AI tools in the digital transformation helps in studying market hence conducting marketing campaigns online which is relatively lower in costs versus offline marketing. Also, digital platforms aid in studying buyers' behaviors through studying and tracking their purchase mechanisms and enhancing consumers' purchase journey.

Conceptual Framework

Marketing managers collect, analyze, monitor, and communicate consumers buying power for decision making purposes. Consequently, managing and analyzing marketing information has become a very important competitive organizational resource due to deregulation of industries, vast technological changes, globalization of markets and extreme changes in customer behavior in the digital transformation era. Marketing knowledge has also become a main driver for economic growth as the infrastructure for competitive advantage. Accurately measuring customer behavioral data through gathering and using marketing information intelligently in an information based and market data driven economy. Using artificial intelligence architecture and stochastic marketing architecture as a measurement framework for creating and sustaining intellectual marketing capital assets in Egypt involves the identification and analysis of available and required tools, models, innovative

human calibers, managerial levels and the concurrent planning and control of the framework to develop marketing data driven knowledge assets so as to attain organizational marketing goals Figure (1) depicts the flow process for generating consumers' buying journey through the artificial intelligence architecture and stochastic marketing architecture and its proposed transformation into intellectual marketing capital within a data driven decision making marketing system as a complete management context and model. Data driven marketing principles can be considered priorly to create an integrated system for turning all marketing data into intellectual marketing capital through artificial intelligence architecture and stochastic marketing architecture. Transforming all baseline investments is vital for people, hardware and software to innovate, sustain and invest in such capital. The marketing advanced information management initiative should lead to designing, developing and maintaining crucial governance and advanced marketing information systems to manage the desired and configured intellectual marketing system. When an advanced portfolio of the artificial intelligence architecture and stochastic marketing architecture is established by the four main drivers of marketing information creation and sharing arising from advanced marketing research, artificial intelligence algorithms, stochastic robust optimization empowered and capable human information creators and adopted modes of the digital transformation technology, that marketing base would be the main driver to function the advanced marketing system to turn this knowledge into required models of intellectual marketing capital assets. The outcome would entice development, maintenance and inclusion into the broader information management and organizational learning systems for marketing industry. Artificial intelligence architecture and stochastic marketing architecture comprise the products, technological tools, and cultural contexts, systems that an organization owns or adopts to enable it to achieve its strategic marketing goals. In terms of strategic payoffs, this paper suggests aa conclusive output

that the underlying rationale of artificial intelligence architecture and stochastic marketing architecture are the thrust for creating and sustaining intellectual marketing capital in the Egypt ecosystem targeted by the centers of excellence the Advanced Marketing Research Center (AMRC) in the British University in Egypt (BUE) and the National Council for Artificial Intelligence Center (NCAI) following Ministry of Communications and Information Technology (MCIT) which are expected to lead to the following major strategic marketing rewards, which can be consequently formulated as testable hypotheses : 1) leveraging marketing value added across the value chain of beneficiaries from AMRC and NCAI, 2) enhancing advanced marketing competencies of these beneficiaries , 3) creating advanced marketing information systems strategies of these beneficiaries, 4) delivering consumer data driven services by these beneficiaries locally and internationally, 5) establishing alliances and partnerships between AMRC and NCAI various stakeholders and 6) enabling Egyptian artificial intelligence leadership by Egyptian in targeted market segments.

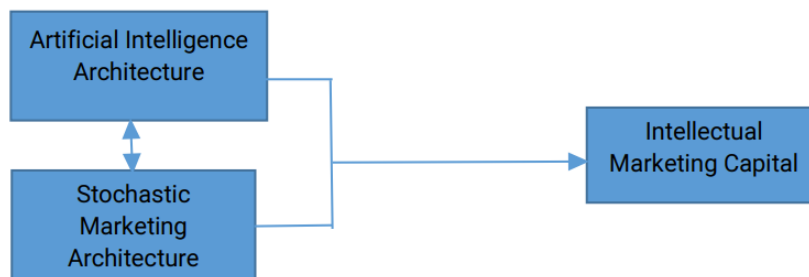


Figure (1): Conceptual Framework

Research Questions

The suggested research questions can be tested on any sector serving the market to Artificial Intelligence Architecture Stochastic Marketing Architecture Intellectual Marketing Capital study the impact of the artificial intelligence architecture that includes tools, human calibers, and the various management

strata that represent the variable of the artificial intelligence along with stochastic marketing architecture that comprises stochastic models for marketing and data analytics teams representing the stochastic marketing system measuring the intellectual marketing capital which is represented in attaining the marketing strategic objectives in terms of market share, brand power and customer continuous delight. The main research question includes the following:

- What are the conditions for attaining a robust artificial intelligence architecture?
- Do certain institutions' cultures foster agile model to attain the artificial intelligence architecture?
- What are the conditions for attaining a robust stochastic marketing architecture? • How can a stochastic marketing model aid in achieving marketing goals in context of the artificial intelligence architecture?
- What is the value added for adopting artificial intelligence and stochastic marketing architectures for elevating marketing capital in terms or marketing goals, brand power, and sustaining customer delight?

Conclusions and Managerial Implications

The literature review showed that the complex artificial intelligence architecture and the stochastic marketing architecture as the base for the advanced marketing information could be executed. Moreover, it comprises integrated process information creation and application and continuous development. It is argued by this paper that one of the major critical areas to reflect this impact is how intellectual marketing capital and knowledge management assets are created and maintainer with special forces of AMRC and NCAI. Various conclusions ought to be derived based upon this discussion and analysis so as to couple the artificial intelligence and the stochastic marketing architectures,

tools, and algorithms in real time to create and sustain intellectual marketing capital in the Egyptian ecosystem accessed via AMRC and NCAI beneficiaries.

There must be also a driver to integrate and share artificial intelligence tools and the stochastic marketing models through allocation of specialized and innovative data analytics engineers and knowledge workers for devising and sustaining intellectual marketing capital. This would enable the intellectual marketing capital to be an integral part of the accountability system for every member of the beneficiaries. In other words, since it is challenging to integrate advanced marketing information system, there should a motivation to share and use marketing insights gained from stochastic marketing analysis and purchase decision journey gained from machine learning algorithms used in artificial intelligence architecture.

Also, the creation and sustainability of the intelligent intellectual marketing capital through artificial intelligence architecture and the stochastic marketing architecture in the Egyptian marketing industries context take place through the achievement of advanced marketing information related business goals concurrent with personalization and development of marketing knowledge networks within the beneficiaries of AMRC and NCAI Moreover, managing advanced marketing information as intellectual capital for the beneficiaries necessitates: 1) building organizational marketing memory through adoption of artificial intelligence architecture and the stochastic marketing architecture, 2) attracting, retaining and digital creators of advanced marketing information systems across all AMRC and NCAI activities, 3) Enticing a stochastic marketing culture across strategic stakeholders that encourages artificial intelligence methodology and stochastic marketing mindset, 4) and finally security of the proposed framework should be highly considered since data is predicted stochastically faster than the market pillars forecasts.

Finally, future research is required to go beyond the current limited literature on managing artificial intelligence architecture and stochastic marketing architecture within the contextual boundaries operating in a highly competitive digital era. The focus should be managing customer journey within an agile methodology with special reference to creating new agile rules of execution via working in squads agile models and advanced marketing platforms, enticing new advanced designs for marketing information systems, suggesting new governance mechanisms for building and sustaining intellectual marketing capital and creating innovative methodologies for the various levels of marketing tools and agile management mechanisms for execution through investing in digital transformation emerging technologies.

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A Roadmap for a Cradle-to-Cradle Approach to Achieve a Sustainable Management System for Waste Lithium-Ion Batteries in the Egyptian Market

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Abstract:

Depleted Lithium-ion batteries from damaged or end-of-life equipment are becoming more abundant in the light of mass production and trade of electronics as laptops and cellular phones, and especially upon the rising commercialization of Electric Vehicles utilizing Lithium-ion batteries. Market research and scientific conclusions indicate that 1) lithium-ion batteries are exported for recycling by experienced industries if not already thrown away irresponsibly in landfills, 2) no specific protocol/policy is set in Egypt to recycle spent batteries in a safe manner, 3) lithium-ion recycling process still lacks a universal standard and could be dangerous if not handled properly. This paper is presenting an attempt to Assess the possibility of developing a suggested framework to authorize and permit potential local lithium-ion recycling solutions, and management improvement of batteries at the end of life (EoL) through the formal waste handling channels. The findings presented in this study highlight the significant potential for adopting sustainable economic growth within the energy storage and waste battery recycling sectors.

Introduction

Resource conservation and responsible production and consumption are primary goals set by International Financial Institutions and United Nations SDGs (Sustainable Development Goals). A number of national initiatives, research, and

corporate activities in Egypt are active in the fields of sustainable solid waste management.² But accounting for the past and current usage of battery-powered electronics and the moderate (but inevitable) rise of electric vehicles in Egypt, consumption and hence the disposal of energy packs (lithium-ion batteries) are anticipated to increase. Lithium batteries contain precious metals as Lithium, Zinc, Cobalt, Iron, and Titanium. A shortage of Lithium and some of the transition metals currently used in Li-ion batteries may one day become an issue.³ It is important to note that there is a possibility Egypt electricity grid would rely on supplementary power as battery energy storage systems (BESS) basically made of lithium-ion, to manage the power supply intermittency.⁴ Transitioning to a low carbon economy (UKRI, Industrial Strategy Challenge Fund, 2020, accessed 20.09.2020.) requires building new, more powerful BESS all around the world.

The flow in demand for batteries would lead to a proportional increase in production and large quantities of LIBs reaching end-of-life (EoL). Hence, that will cause an increasing trend of battery waste that should be managed accordingly.⁵

Egypt is a huge, significant market for consumer electronic equipment and devices [CAPMAS (2019)]. In Egypt, depleted lithium-ion and alkaline batteries are usually sold with scrap steel, disposed of in landfills, and occasionally mixed with solid wastes and refuse-derived fuel (RDF) to be burned in cement kilns⁶. This paper explores the possible management systems to be adopted or deployed in an attempt to achieve a sustainable economic growth in energy storage and battery/electronic waste recycling.

The Problem: Negative impact of depleted batteries on the local environment and sustainability

² <https://www.undp.org/egypt/press-releases/launch-e-tadweer-e-waste-management>

³ Naoki Nitta, Feixiang Wu, Jung Tae Lee, Gleb Yushin, Li-ion battery materials: present and future, *Materials Today*, Volume 18, Issue 5, 2015

⁴ <https://enterprise.press/hardhats/viable-battery-storage-solution-egypts-electricity-oversupply-problem/>

⁵ M. A. Rajaeifar, O. Heidrich, P. Ghadimi, M. Raugei and Y. Wu, *Resour., Conserv. Recycl.*, 2020, 161, 104905

⁶ Interview with Solid Waste Collector Syndicate in Egypt

The main structure of Li-ion batteries contains graphite or graphene as the anode, Lithium oxide for cathode, lithium salts dissolved in organic solvents as an electrolyte, and a separator made of polyethylene or polypropylene. Li-ion batteries are very dangerous if not disposed of properly and can cause serious harm to human health and the environment.⁷

Currently, there are no universal or unified standards for waste disposal of LIBs. Improper processing and disposal of spent batteries leads to contamination of the soil, water and air. The toxicity of the battery material is a direct threat to organisms on various trophic levels as well as direct threats to human health.⁸

Extraction

The extraction process of lithium is very resource demanding and specifically uses a lot of water in the extraction process. It is estimated that 500,000 gallons of water is used to mine one metric ton of lithium. Furthermore, toxic chemicals used in the separation process, such as hydrochloric acid, can leak from the evaporation pools into local water supplies and also affect air quality.⁹

Disposal

Lithium-ion batteries contain metals such as cobalt, nickel, and manganese, which are toxic and can contaminate water supplies and ecosystems if they leach out of landfills.¹⁰

Additionally, fires in landfills or battery-recycling facilities have been attributed to inappropriate disposal of lithium-ion batteries.¹¹

The toxicity of the battery material is a direct threat to organisms on various trophic

⁷ T. Nakajima, in Adv. Fluoride-Based Mater. Energy Convers., Elsevier, 2015, pp. 147-172.

X. Zheng, Z. Zhu, X. Lin, Y. Zhang, Y. He, H. Cao, Z. Sun, Engineering 2018, 4, 361-370.

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⁸ Energy Environ. Sci., 2021,14, 6099-6121

⁹ Bauer, Sophie (2020-12-02). "Explainer: the opportunities and challenges of the lithium industry". Dialogo Chino. Retrieved 2021-12-14

¹⁰ Jacoby, Mitch (July 14, 2019). "It's time to get serious about recycling lithium-ion batteries". cen.acs.org. Retrieved 2022-09-05

¹¹ US EPA, OLEM (2020-09-16). "[Frequent Questions on Lithium-ion Batteries](https://www.epa.gov/frequent-questions-lithium-ion-batteries)". www.epa.gov. Retrieved 2022-09-05

levels as well as direct threats to human health. Identified pollution pathways include leaching, disintegration and degradation of the batteries, however violent incidents such as fires and explosions are also significant. Disposed lithium batteries, which may be holding a charge and contain flammable electrolytes, may trigger, amplify and prolong landfill fires.¹²

Case Studies and literature

Research on battery waste handling and management in Egypt has been assessed in a number of issued reports. One of which is a study conducted by CEDARE¹³ (Center for Environment & Development for The Arab Region & Europe) revealed that the precious and base metals refining process, even which is carried out by the existing formal sector, produces products of low yield as proved by the end processing of these materials. The reports indicate that refining outside Egypt is a solution for this problem; therefore, the export of the e-waste fractions (batteries) was investigated. It was found that the export of PCBs (Printed Circuit Boards) and lithium batteries is a common practice in the formal sector, but some challenges are facing the battery exporters such as:

- The profitable amount of PCBs and lithium batteries to be exported (**50 tons/month** is the minimum quantity that may achieve profit)
- The formula between the exporter and the refining facility
- These challenges could hinder the activity of small waste management enterprises, thus, working within business partnerships could overcome these challenges

Challenges facing the formal WEEE recycling sector also comprise legal constraints as no legislations are developed addressing waste management for WEEE in Egypt. Thus, solutions or methodologies to legally specify the collection of WEEE as an input to a formal business or industry is not formulated. As it is

¹² Wojciech Mrozik et al, Environmental impacts, pollution sources and pathways of spent lithium-ion batteries, *Energy Environ. Sci.*, 2021, 14, 6099

¹³ Assessment of WEEE dismantling business opportunities, Formal Sector – 2017, SRI/CEDARE

complicated to define WEEE as a fraction by rigid law, according to the study. Dominance of the informal sector is another main challenge. The informal sector in Egypt controls the WEEE and threatens the business future of the formal sector. Formal companies are suffering the lack of input flow due to the monopoly of the informal sector. This concludes that the current formal sector is of limited capacity and shares a limited market segment; in the contrary of the informal sector that dominates the market and operates in lack of regulations or environmental measures protecting workers and the environment. Furthermore, local solutions for lithium battery recycling or extraction of precious materials are unavailable. Precious and base metals extraction from rechargeable Lithium batteries is not processed in Egypt, and export of such components are professionally processed and refined in specialized companies outside Egypt.¹⁴

Further studies confirm that Li-ion batteries have no local recycling potential or processes. Soliman and Boshra (2017) estimated the e-waste generated in Cairo area and presented the amount of each material in the collected e-waste and the method of management. The largest volume generated is the PCBs and plastics respectively. This could indicate that recycling of these two streams are potentially feasible industries in Egypt. However, they have stated that exporting PCBs and lithium batteries is the most appropriate business model due to the unavailability of the required technology for material recycling in Egypt. Egypt is the highest e-waste generating country in Africa, producing more than 20% of e-waste generated in African countries, but has no reliable infrastructure for e-waste management. Improper handling of e-waste shall lead to serious impacts on community health and environment.

¹⁴ The task was carried out within the framework of the Sustainable Recycling Industries (SRI) project being implemented by the Swiss Federal Laboratories for Materials Sciences (EMPA) as mandated by the State Secretariat of Economic Affairs (SECO) of Switzerland.

A reference document [ITU- UNEP- UNU]¹⁵ revealed that 2342 kg of rechargeable batteries were generated from hotel and education activities in Jordan in 2018, of which 9% only were disposed of via delivery to a recycling specialist, 4% was “sold”, and 87% was disposed of into a dumpsite. The workshop document presented by WMRA also stated that previously e-waste was improperly managed by informal sector in Egypt, as e-waste was either burnt or manually dismantled without occupational safety considerations.

Understanding of Li-ion battery types



Figure 1 Types of battery cells

Understanding the types of li-ion battery commercial types could assist in their local handling, collection, storage, sorting and treatment at the EoL. It is of high probability that small-sized li-ion batteries are used by domestic consumers and thus usually mixed with the municipal solid waste, while heavier batteries, as the ones in utility power supplies and EV cars, can be collected from battery repair agents or corporate buildings.

The following types lithium ion battery types are identified from different sources:

¹⁵ The Status of Electronic Waste in Egypt: Dr. Shaimaa El Sayed Mohammed, Director of Final Disposal Department, WMRA Agency, Egyptian Ministry of Environment, Egypt

¹⁶ Tran, M.-K.; DaCosta, A.; Mevawalla, A.; Panchal, S.; Fowler, M. Comparative Study of Equivalent Circuit Models Performance in Four Common Lithium-Ion Batteries: LFP, NMC, LMO, NCA. *Batteries* 2021, 7, 51. <https://doi.org/10.3390/batteries7030051>

- LCO (lithium cobalt oxide - LiCoO_2): It was originally commercialized by SONY, used in the majority of commercial Li-ion batteries in mobile phones, laptops and digital cameras
- LMO (lithium manganese oxide - LiMn_2O_4) used in power tools, medical devices, electric powertrains
- NCM (nickel cobalt manganese oxide) or Lithium Nickel Manganese Cobalt Oxide (LiNiMnCoO_2) - used in mobility applications as E-bikes, medical devices, EVs, industrial
- NCA (nickel cobalt aluminum oxide, LiNiCoAlO_2) - Medical devices, industrial, electric powertrain (Tesla)
- LCP (lithium cobalt phosphate) - used in backup battery and Electric Vehicle (EV) applications
- LFP (lithium iron phosphate, LiFePO_4) - Portable and stationary needing high load currents and endurance
- Lithium Titanate (Li_2TiO_3) – LTO - UPS, electric powertrain (Mitsubishi i-MiEV, Honda Fit EV), solar-powered street lighting
- LTS (lithium titanium sulfide - Li-SO_2) - This kind of battery cell is mainly used in defence applications, alarms and security wireless devices, mobile asset tracking, utility metering or electronic Meters (Water, Gas, Electricity), professional electronics¹⁷¹⁸¹⁹

Identification of local waste management players in formal and informal sectors

Local waste recyclers are classified into formal and informal players. The formal players are legal corporations or entities established and operating with a registered Tax card, commercial register, environmental approval from a competent authority where relevant, and conforming with the recent waste law No.

¹⁷ Naoki Nitta, Feixiang Wu, Jung Tae Lee, Gleb Yushin, Li-ion battery materials: present and future, Materials Today, Volume 18, Issue 5, 2015Pages 252-264, ISSN 1369-7021, <https://doi.org/10.1016/j.mattod.2014.10.040>.

¹⁸ <https://aliumbatteries.com/products/primary-batteries/li-so2-battery/>

¹⁹ <https://batteryuniversity.com/article/bu-205-types-of-lithium-ion>

202/2020 and executive regulation no. 722/2022 requirements.

According to interviews, informal sector waste collectors are entities operating under a cultural socio-economic norm. The sector could be visualized, at times, as intertwined communities that have a deep knowledge of the municipal waste generators and generate income from waste collection and processing. Such waste processing is unregulated, unsafe, and mostly unmonitored (by authorities) in terms of quantity and classification.

UNDP (2018) reports indicate there are few data on release of hazardous substances from e-waste. Most of e-waste including batteries is still being collected informally or simply dumped with obvious harm for the environment. The report refers to the improper dumping of at *least 50 tons of batteries or other e-waste containing PTSs* (Persistent Toxic Substances) that could be prevented. Although projects on the collection of batteries have been implemented in the past, most EoL (End of Life) batteries are still being dumped. Targets of the end project list a requirement for a pilot project for collection scheme e-waste containing PTS - as mercury, lead or cadmium - built on the experience of similar projects (i.e. the Waste Mobile Battery Collection and Recycling (2005-2006) implemented, resulting in the collection of at least 10 tons of e-waste. Although projects on the safe collection of batteries have been conducted in the past there is still low capacity in the collection / management of EoL batteries and CRT (Cathode Ray Tube) monitors as the recycling of this waste is “not profitable”.

Exports of EoL batteries involve e-waste initiatives from large corporate companies as per the UNDP/GEF report:

- In the summer of 2011, Nokia partnered with Resala NGO for the recycling of mobile phones, batteries, chargers and other mobile accessories.

- Mobinil (now known as Orange) has been conducting limited but effective recycling actions since 2005, through implementing mobile handsets and mobile batteries collection and recycling schemes under the UN Basel Convention and in cooperation with the Ministry of Environment. Mobinil carried out the following initiatives: Office Waste Recycling (since 2002); Waste Mobile Battery Collection and Recycling (2005-2006); Bridging the Digital Divide”
- Vodafone Egypt is implementing various initiatives as part of its CSR program, such as an instore mobile handset and battery collection initiative, against an incentive recharge card.

Initiatives developed by Vodafone Egypt and Orange were as follows: Waste Mobile Battery Collection and Recycling (2005- Alexandria Dry Cell Collection and Safe Dumping (since 2008); Ewaste Learning Center (2009); Participation in Mobile Phone Partnership Initiative (MPPI).

According to NORCAP (2022) explaining e-waste management for off-grid solar solutions, Li-ion batteries should remain intact and are treated as their own fraction by waste companies until transported to final recycler.

United Nations University concluded that the top three African countries with the highest domestic e-waste generation (in 2014) in absolute quantities are Egypt (0.37 Mt or 370 million metric tons), South Africa (0.35 Mt) and Nigeria (0.22 Mt). The total e-waste generation in Africa was 1.9 Mt, hence Egypt represents almost 20% of annual e-waste generation. That is compared to global quantity of e-waste generation in 2014 which was around 41.8 million metric tons, where only 6.5 million tons were collected by formal recyclers (UNDP, September 2020)²⁰²¹. Accounting for the estimated percentage by the World Bank (2014), lithium-ion battery fractions are present in small quantities, less than 2% of the total weight of

²⁰ Baldé, C.P., Wang, F., Kuehr, R., Huisman, J. (2015), The global e-waste monitor – 2014, United Nations University, IAS – SCYCLE, Bonn, Germany.

²¹ Medical and Electronic waste Management project – UNDP/Ministry of Environment

e-waste²², thus, the generated quantities of EoL li-ion batteries can be estimated to be 7,400 tons/year. This is only accounting for the domestic e-wastes that were registered through formal collectors.

International regulations, standards and guidelines

Batteries are considered WEEE within a legal context as they form either a basic component of electric or electronic equipment or standalone energy packs providing electric power. International regulations and standards set the features for the management of WEEE, including but not limited to the below.

- **WEEE Label OF Excellence (WEEELABEX):** developed new standards for WEEE recycling processes that are becoming international benchmarks and defines the rules and trained auditors to ensure that achievement of the required standards is effectively assessed and communicated via the new WEEE Label of Excellence.
- **EU directives**

The EU Battery Directive (Directive 2006/66/EC) contains provisions on the collection of batteries at EoL, but does not explicitly state that member states should collect li-ion batteries. It sets targets for the collection and recycling of waste batteries. The directive requires EU member states to take measures ensuring the sustainable collection (systems) and treatment of waste batteries to achieve the following targets:

- Article 11 of the Directive sets a target for the collection of waste portable batteries, aiming for a minimum collection rate of 45% by weight of portable batteries placed on the market in the three years following the directive's implementation.

²² Preparatory Information for the Implementation of an Electronic Waste Pilot Project in Egypt – The World Bank, Original date: April 2nd, 2012, Amended: August 6th , 2014

- Article 13 establishes a target for the recycling of waste automotive batteries, with a minimum recycling efficiency rate of 50% by average weight of automotive batteries and industrial batteries.

Member states are responsible for designing and implementing collection systems aligning with the directive's objectives. Specific details on collection methods and infrastructure may be outlined in a national regulations or plans adopted by individual member states.

Batteries Directive, adopted in 2006 and amended in 2013 (Directive 2013/56/EU), is meant to standardize the end-of-life management of batteries and accumulators across the EU states in order to mitigate the impact of batteries and accumulators on the environment. To ensure effective collection, **it is required that distributors takeback waste batteries at no charge and that convenient collection points are established**; this enables the fulfilling of the minimum collection rates set by the directive. **Energy recovery or disposal in landfills are kept as a final resort for member states after treatment has taken place or when no available technology is available for recycling and treatment.** The directive is spreading awareness and knowledge among consumers; this can be achieved through the clear visible labelling of batteries and accumulators with the symbols set by the directive (Directive 2006/66/EC of the European parliament and of the council of 6 September 2006 on batteries and accumulators and waste batteries and accumulators and repealing Directive 91/157/EEC).

Key modifications of Directive 2013/56/EU to the previous 2006 Directive include:

- **Transportation Provisions:** provisions related to the transportation of waste batteries

- **Registration of producers:** As the directive requires battery producers to register with national authorities and provide information about the types and quantities of batteries distributed in the market.
- **Minimum Recycling and Disposal Targets:** It set specific targets for the recycling and environmentally sound disposal of waste automotive and industrial batteries, further promoting sustainability in the battery industry.
- **Labelling Requirements:** The directive included updated labeling requirements for batteries to provide consumers with more information about their environmental impact and proper disposal.
- **Reporting Obligations:** Producers and member states were required to report data on the collection, treatment, and recycling of batteries, promoting transparency and accountability.

WEEE Directive 2012/19/EU, the "Waste Electrical and Electronic Equipment Directive" (WEEE Directive), includes the management of batteries in electronic and electrical equipment. It complements the EU Battery Directive (Directive 2006/66/EC) and addresses disposal and recycling of waste batteries as part of WEEEs, and states:

Article 7: "From 2019, the minimum collection rate to be achieved annually shall be 65 % of the average weight of EEE (Electric and Electronic Equipment) placed on the market in the three preceding years in the Member State concerned, or alternatively 85 % of WEEE generated on the territory of that Member State."

Moreover, an EU proposal (for a regulation) concerning batteries and waste batteries, repealing Directive 2006/66/EC and amending Regulation (EU) No 2019/1020 has been publicized and states the following:

“Battery development and production are strategic imperatives for Europe in the context of the clean energy transition. It is also a key component of Europe’s automotive sector. In the EU, transport is responsible for roughly a quarter of greenhouse-gas (GHG) emissions and is the main cause of air pollution in cities.”

“Creating a reporting system for automotive and industrial batteries requires collecting information that is already generated at national level. Moreover, for automotive and electric-vehicle batteries, the reporting system could be built on top of the system set up by the End-of-life Vehicles Directive.

The recycling efficiency target for lithium batteries is set at 65% starting in 2025. Eurostat²³ has collected data on recycling efficiencies for lead, cadmium and other batteries on a yearly basis since 2014. It would therefore be a minor addition to include the recycling efficiency of lithium to the established data collection procedure. (EU Battery directive).”²⁴

- **Publicatiereeks Gevaarlijke Stoffen (PGS) 37 guidelines**

The guideline of PGS 37 version 1 focuses on Energy Storage Systems (EOS or Energie Opslag Systemen in Dutch) where large amounts of energy are stored - also known as ‘neighborhood’ or ‘community’ batteries.

PGS 37 version 2 deals with the storage of lithium-based energy carriers, as waste battery collectors or users who (temporarily) store lithium batteries.²⁵

²³ Eurostat is the statistical office of the European Union (EU), responsible for collecting and providing statistical information and data related to various aspects of the EU's economy, society, and environment. It is one of the directorates-general of the European Commission, the executive branch of the EU. - <https://ec.europa.eu/eurostat/>

²⁴ <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52020PC0798&rid=1>

²⁵ <https://publicatiereeksgevaarlijkestoffen.nl/publicaties/online/pgs-37-2/2022/0-1-maart-2022/#1>

The guideline is developed for Lithium-ion batteries and accumulators which are defined as storage devices used for personal applications (in telephones, laptops, e-bikes, household appliances), in vehicles (fully electric or hybrid), for e-ships on inland shipping and in the future also for seafaring.²⁶

Local Regulations

The waste law 202/2020 and executive regulations 722/2022 require that all contractors functioning in the waste activities should adopt and contribute to an integrated waste management system. Companies operating as part of the waste of the integrated waste management system have to be approved by the competent administrative authority, WMRA (Waste Management Regulatory Authority).

WEEE is categorised as hazardous waste under a list issued by the Ministry of Industry (Decree 165/2002), item 16. Accordingly, it is regulated by the articles addressing hazardous waste management in the Environmental law number 4/1994.

Storage Requirements for the WEEE shall then match with hazardous wastes storage requirements in Article 28/1(executive regulation of Law 4/1994 & 9/2009 and its amendments and executive regulations).

The National Committee for the Sustainable Management of Electronic Waste was established among the relevant ministries to assess the health and environmental impacts and track electronic waste according to the Minister of Environment Decree No. 124 of 2019 on 4/23/2019. **But local law does not stipulate specific training requirements for the management of WEEE/batteries.** Batteries possess hazardous properties that require specialised training, and that would be part of the training required as per the occupational health and safety requirements in

²⁶ <https://publicatiereeksgevaarlijkstoffennl/publicaties/pgs37-2/>

Decree 134/2003. This ministerial decree can be possibly modified to include

Perception of the current batteries flow system on a national level

The current consumer market is based on importing electronic and electric equipment, and EEE components that may be assembled at local manufacturers. The annual import quantity of lithium batteries within those EEEs is undetermined. EEEs are distributed to retail and local markets so that consumers use the devices till the EoL of the lithium batteries. Usually, batteries are disposed of by consumers as regular domestic or municipal waste and thus collected by informal and formal waste collectors in dumpsites. Upon better practice, sorting of the wastes occurs and the hazardous e-wastes are separated, then disposed of in landfills or mixed with refuse-derived fuel (RDF) for incineration in cement kilns. Figure 2 shows a schematic of the typical route of li-ion batteries.

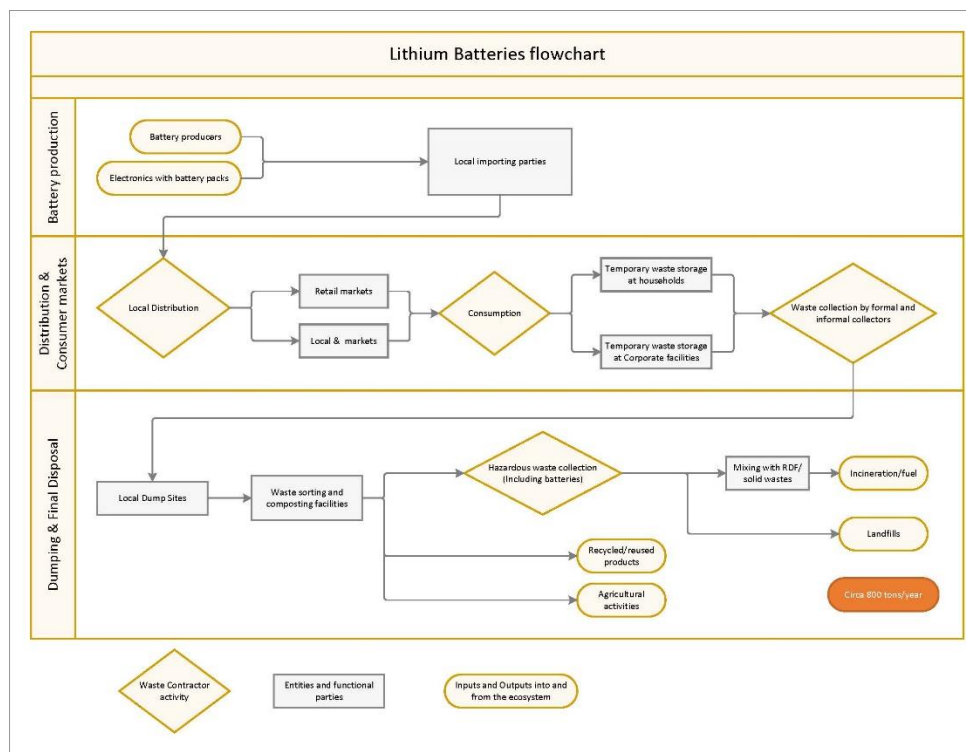


Figure 2 The current used batteries as part of the hazardous wastes management system

Industrial solutions

A- Current Solutions

Phone applications

The Ministry of Environment has launched a national campaign for safe electronic waste disposal through a mobile application, E-Tadweer, in 2021. The application is thriving to achieve a system for collecting e-waste from individuals by providing reduction vouchers (as incentives) to dispose of electrical and electronic waste. Along with this tool, the ministry has promoted the campaign on social media platforms and launched campaigns to raise awareness for various “society groups” about the necessity of safe disposal of their electronic waste using the E-Tadweer electronic application in a safe manner.²⁷

Practical usage of the application has concluded that lithium-ion batteries are listed as one of the accepted e-waste categories. The authors of this paper tested the application by requesting the disposal of one old li-ion laptop battery. The application then generated a request code, displayed a coupon from a purchase-saving app, and directed the author to selecting one of three branches in Cairo to drop off the laptop battery. The request took 5 processing days and resulted in rejection of the used battery for no specific reason, as per Figure 3. The collection center is a branch of a corporate electronics manufacturer and seller; Raya Holding.

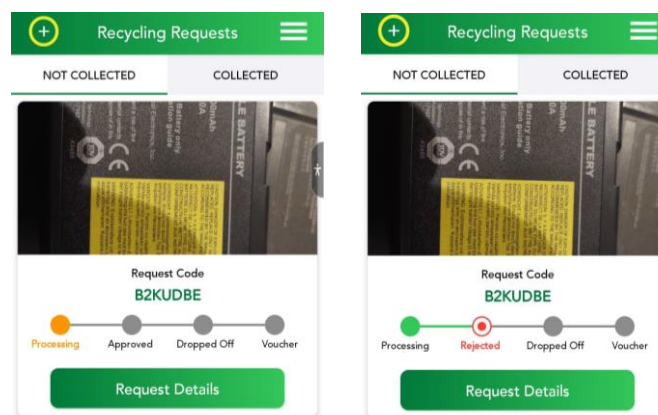


Figure 3 Experiment on E-Tadweer app in attempt to dispose of one li-ion battery

²⁷ <https://www.undp.org/egypt/press-releases/launch-e-tadweer-e-waste-management>

The E-Tadweer approach in battery (or e-waste) collection is operatable, yet has limitations in practicality as per the experiment. The process limitations include:

- 1- The necessity for commuting to a collection point in Cairo - or four newly added governorates in September 2023
- 2- Incentives, basically redeemable discount coupons up to 25%, are most probably not attractive to target groups/consumers
- 3- Chain of custody is not obvious, final disposal destination and processing is not declared to consumers
- 4- Limited knowledge of the Egyptian citizens of the existence and benefits of this application or initiative

One of E-Tadweer's head executives was interviewed to understand the local case with waste batteries and stated that the battery collector (Raya) might have perceived that the battery (requested for submission) was possibly damaged, and usually waste collectors avoid handling damaged batteries due to the high possibility of hazardous material leakage or fires. It has been reported by E-Tadweer that they collect 30 tons of WEEE annually, and li-ion batteries are usually embedded in them representing approximately 15% by mass, i.e. **4.5 tons/year of generated waste li-ion batteries**. E-Tadweer also reported significant market indicators for li-ion batteries:

- 1- Damaged batteries (swollen) are usually disposed in dumpsites then transported directly to El Nasreya, a hazardous waste treatment, disposal, and landfill facility in Alexandria; and has been developed within the overall legal framework of the Egyptian Law for the Environment²⁸.
- 2- Used Li-ion batteries are of very low price ranging from EGP 18-25 / kg, damaged or swollen batteries are even cheaper at EGP 5/kg
- 3- Raya and other corporations avoid collection of damaged or used low quantities of waste batteries to avoid risks of fire or hazardous material leakage

²⁸ Ramadan AR, Kock P, Nadim A. Nasreya: a treatment and disposal facility for industrial hazardous waste in Alexandria, Egypt: phase I. Waste Manag Res. 2005 Apr;23(2):167-70. doi: 10.1177/0734242X05053689. PMID: 15864958.

- 4- The cost of collecting waste li-ion is perceived as much higher than the cost of recycling, which infers that the li-ion recycling business is not economically feasible in Egypt
- 5- EPR systems could pose a financial risk on local electronic equipment importers and manufacturers: prices of electronic equipment (as mobile phones for example) already bear the additional cost of duties and levies (VAT, customs duties, taxes etc) which lead to a considerably high price for the local consumer, and a “modest” profit for the producer ranging from 3-4% for every mobile phone. Placing an additional cost on EEE products to support the EPR system shall most probably discourage businesses in this sector as it shall lead to profit reduction.
- 6- A few facilities in Egypt perform waste battery shredding and export, but the collection of feasible quantities is still a huge challenge. Huge E-waste (including batteries) quantities are sold in official auctions to waste management companies, even by official State entities as the Ministry of Environment.

According to WMRA’s workshop, Egypt has 7 e-waste recycling companies operating in compliance with environmental law and possess necessary licenses conforming with Article 55 of Waste Management Law No. 202 of 2020. Through those companies, WMRA is able to follow up/track the waste from “transportation to final disposal”.

In the meantime, the Ministry of Environment strives to provide technical support for giving legal status to the informal waste sector.

B- Solutions under local scientific research

An Egyptian experimental study has been presented in 2020 attempting to recycle Lithium, Nickel, Manganese, and Cobalt hydroxides and demonstrated that the raw materials were successfully recycled from spent Li-ion batteries electrodeposited on nickel foam, and fully characterized using different laboratory techniques. The recycled materials are used as positive electrodes to construct supercapacitor devices. The device shows a coulombic efficiency of 100%, a capacitance retention reaching approximately 90% with excellent cycling stability after 10000 cycles as well as reasonable power and energy densities.²⁹ The study concluded that the proposed versatile recycling approach would open a new opportunity for the synthesis of electroactive films from spent Li-ion batteries and their use to construct devices with reasonable (electrical) performance. A commercial application of the study has not been assessed, but it could be one of the recycling solutions on industrial scale. Yet, it is not a confirmation that retracted materials could be reused as feedstock to production of new batteries.

C- Solutions outside Egypt

In the Netherlands, li-ion batteries are collected as a part of e-wastes. Several collection points are witnessed during the authors' investigation visit and were located mainly at major supermarkets, shops selling electronics, or retail product shops. Bins were indicating the disposal of either Alkaline batteries separately, or electronics (that could contain li-ion batteries), in addition to fluorescent and LED lamps, as per figures 4 & 5.

²⁹ Mesbah, Y. I., Ahmed, N., Ali, B. A., & Allam, N. K. (2020). Recycling of Li-Ni-Mn-Co Hydroxide from Spent Batteries to Produce High-Performance Supercapacitors with Exceptional Stability. *ChemElectroChem*, 7(4), 975-982. <https://doi.org/10.1002/celc.202000081>



Figure 5 Consumer/corporate disposal containers observed in Ede, The Netherlands



Figure 4 WEEE (phones and tablets) collected in a phone store in The Hague, Netherlands

Stichting Stibat Services (Stibat), a Dutch non-profit organization responsible for the collection and recycling of portable batteries and accumulators (rechargeable batteries) in the Netherlands, works to satisfy EU WEEE Directive, which applies to manufacturers and importers of electronics and electrical equipment within EU member states. They must register all equipment sold in a national WEEE register³⁰ and collect at least 65% of the electronics equipment volume sold.

As a consumer or corporate body, it has been concluded that identifying disposal points, or collection points, can be facilitated by an online website (operated by Wecycle) illustrating a map of the closest collection point to the waste generator, as per the figure 6.

³⁰ <https://nationaalweeeregister.nl/rapportage/>

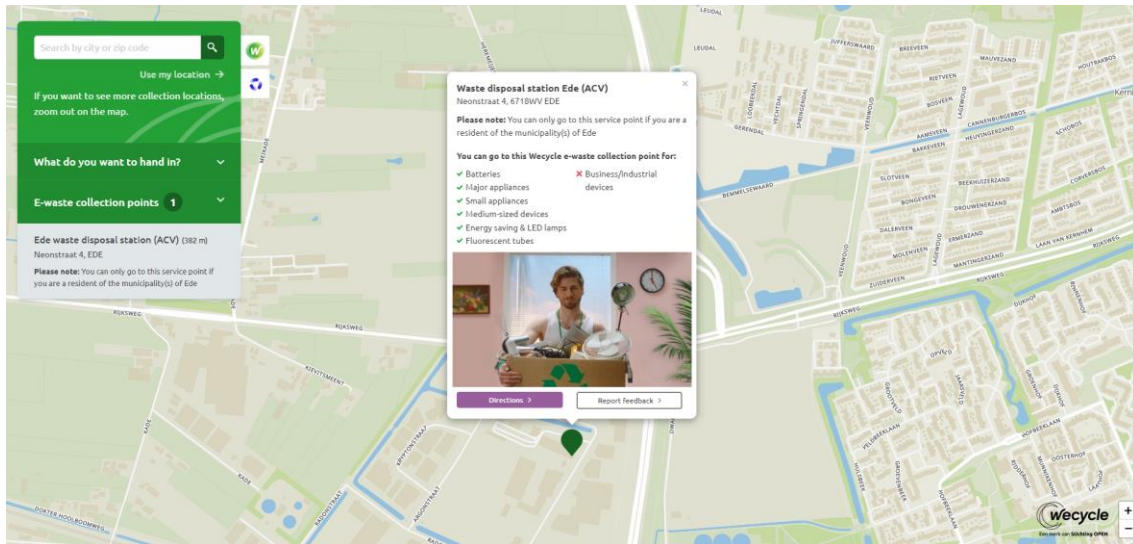


Figure 6 e-waste collection point map for consumers or business end users³¹

The Authors interviewed Stibat to gain a clear understanding of the collection system. The organization's main objective is the fulfilment of their responsibilities aligned with the EU Battery Directive and national regulations related to battery waste management, which includes management of collection points, facilitating transportation of waste batteries to recycling facilities, and promoting public awareness about battery recycling. Stibat works in collaboration with Stichting Open, another Dutch non-profit foundation responsible for collection and recycling of e-waste in the Netherlands on behalf of producers of electrical appliances and works with several partners to collect and recycle e-waste from households, businesses, and institutions.

Stibat confirmed that the retailers have the responsibility to register the imported/produced battery quantities and retrieve - or accept - the batteries after end-of-life. This indicates the requirement for safe temporary batteries storage and thus a permit for storage of large quantities. Recycling is not the only option for non-functional battery packs. Lithium-ion battery (packs), as they are usually

³¹https://inleverpunten.stichting-open.org/?utm_source=watismijnapparaatwaard.nl&utm_medium=website&utm_campaign=coach&utm_content=intro-inleveren

constituted of a pack of lithium-ion battery cells, can undergo refurbishment by local recyclers who eliminate the damaged battery cells from the pack, replace them with functional ones, then reuse the battery packs for an additional lifecycle. As stated by Stibat, recyclers in the Netherlands are paid to recycle waste lithium-ion batteries, unlike Egypt, where recyclers usually buy the waste batteries in auctions.

Though the system is proven functional and effective in the Netherlands, Stibat still faces huge challenges in registering and tracking batteries imported and resold through commercial platforms. Some other types of batteries are problematic and sustainably undesired as LTC primary batteries (non-rechargeable lithium thionyl chloride (Li-SOCl₂ batteries) which are considerably hazardous.

In an attempt to identify the reliability and robustness of the EoL battery disposal system through corporate bodies in the Netherlands, the Authors planned an investigation of the battery disposal via an interview with a local Dutch corporation, Cleantron, a battery manufacturer working mainly on producing mobility li-ion batteries. The corporation is in thorough awareness that they are, as producers, and as per the local regulations, have the duty to “look after” the batteries they place in the Dutch market; and the batteries’ end of life. But obligations to receive or retrieve their batteries at EoL, as producers, do not extend to foreign customers.

If a local Dutch manufacturer of ebikes (an Original Equipment Manufacturer) contracts Cleantron for battery supply, the latter sells the batteries with an additional fee (negotiated with the client depending on battery size and capacity) bore by the buyer, then Cleantron pays the local collector (Stibat) this fixed fee for the pickup and disposal of batteries at the EoL, according to terms of a contract between Stibat and Cleantron.

This fee, enforced by the regulator, guarantees that the waste batteries do not end in a dump yard or landfill, by creating an Extended Producer Responsibility (EPR), a strategy to add the estimated environmental costs associated with a product throughout the product life cycle to the market price of that product, and improves the waste management process.³²

Stibat through its intricate collection network collects batteries at the end of life from manufacturers and corporate bodies as Cleantron, from grocery stores and hypermarkets, and transports the end of life batteries to sorting facilities where different types of batteries are segregated, waste batteries are then reported to be dismantled, discharged and ground, then sent to “recyclers” (as Umicore) where thermal treatment takes place on the battery material producing black mass. This process has been taking place for 10 years and still occurs to current day. Urban mining³³ or the recovery of metals through mechanical and chemical treatment from the batteries, as reported by Cleantron, is not the main approach in the Netherlands, but several industrial initiatives are currently being developed and subsidized. It has been reported that no or very few Hydrometallurgical processes³⁴ are taking place locally on black mass, such processes require subsidies as there are no current reliable economic systems to sustain its independent financial operation. As reported, this business model is still under experiment in Europe.

Producers as Cleantron are approached by Korean battery cell manufacturers to collect scrap batteries at end of life in return for paying negotiated fees, the Korean

³² OECD (2001). *Extended Producer Responsibility: A Guidance Manual for Governments*. Paris: OECD Publications Service. doi:10.1787/9789264189867-en. ISBN 9789264189867.

³³ Renner, Hermann; Schlamp, Günther; Hollmann, Dieter; Lüscho, Hans Martin; Tews, Peter; Rothaut, Josef; Dermann, Klaus; Knödler, Alfons; Hecht, Christian; Schlott, Martin; Drieselmann, Ralf; Peter, Catrin; Schiele, Rainer (2000). "Gold, Gold Alloys, and Gold Compounds". *Ullmann's Encyclopedia of Industrial Chemistry*. doi:10.1002/14356007.a12_499. ISBN 3527306730.

³⁴ Involves using a leaching process, where the black mass is dissolved in a solution, often a strong acid or base. The purpose of this step is to liberate the valuable metals from the black mass, allowing them to be recovered. -

manufactures are said to recover the base metals and battery materials from black mass and feed it in back to the lithium-ion battery manufacturing process.

According to the interview with the battery manufacturer, Cleantron, it has been reported that European battery manufacturers do not produce the battery cell itself, but rather assemble various battery components suitable for certain machinery or equipment as e-bikes, forklifts, electric vehicles, etc. Thus, recycling of waste batteries (to extract the raw materials) is best handled by the original cell manufacturers themselves, which are companies located mainly in Asia; China and Korea. In order to fully close the loop of the li-ion batteries, battery users should deliver or submit their waste batteries to the local e-waste collector (Stibat). Battery producers and importers distribute batteries and accumulators on the Dutch market. Stibat's activity ensures these batteries and accumulators are collected and "recycled". Producers pay the management fee for every battery they put on the market. In accordance with laws and regulations (Batteries and Accumulators (Management) Decree 2008 and the Batteries and Accumulators (Management) Regulation 2008), a company is considered a 'producer' if it is the first in the Netherlands to market the batteries concerned professionally.

Stibat Services currently maintains a collection network of over 25,000 collection points in the Netherlands, with a specific density of at least one collection point per 2,000 inhabitants in every town or city.³⁵ Stibat is reported to transport the batteries (under certain safety precautions) to a dismantling, sorting and shredding facility converting the batteries into a less hazardous material, then exporting material to an Asian battery manufacturer. But this export route, as reported, is not the main current practice in Europe, as batteries are sent to companies (as Umicore) conducting thermal treatment to the shredded material to produce black mass and use it in the construction industry, as in additives to concrete or road markings. No online sources verify what has been reported in relation to use of black mass in construction. But as Cleantron has noted, the new subsidized companies are

³⁵Stibat Services annual report 2020 - <https://jaarverslag2020.stibat.nl/en/results-2020/>

starting to use metal recovery technologies (as hydrometallurgy) in Europe. Future battery cell manufacturers are expected to operate in Sweden, France, and Belgium.³⁶

Transportation (and storage) of the used batteries not only requires considerable safety precautions (figures 7 and 8) and regular audits, but special governmental permits and conformance with newly developed PGS 37-2 guidelines³⁷. It is considered a dangerous activity and actually costly in Europe, once waste batteries are discharged, dismantled, and no longer are deemed a short circuit causing potential fires, transportation cost is drastically reduced.



Figure 8 Safety storage cabinets for waste batteries (at Cleantron facility)



Figure 7 Special waste li-ion battery container for temporary storage containing Vermiculite prior transport by Stibat (at Cleantron Facility)

Whether the black mass is treated and fed into battery cell manufacturing process again in Europe or sent to the battery cell manufacturers back to Asia, the battery lifecycle is directed to closing the loop, and hence, this is a valid sustainable option compared to disposal in dumpsites or landfills. Figure 9 below illustrates a brief flowchart of the investigated waste battery management system in the Netherlands.

³⁶ Based on an interview with Cleantron's Managing Director - battery manufacturer in The Netherlands

³⁷ <https://publicatiereeksgevaarlijkstoffennl/publicaties/pgs37-2/>

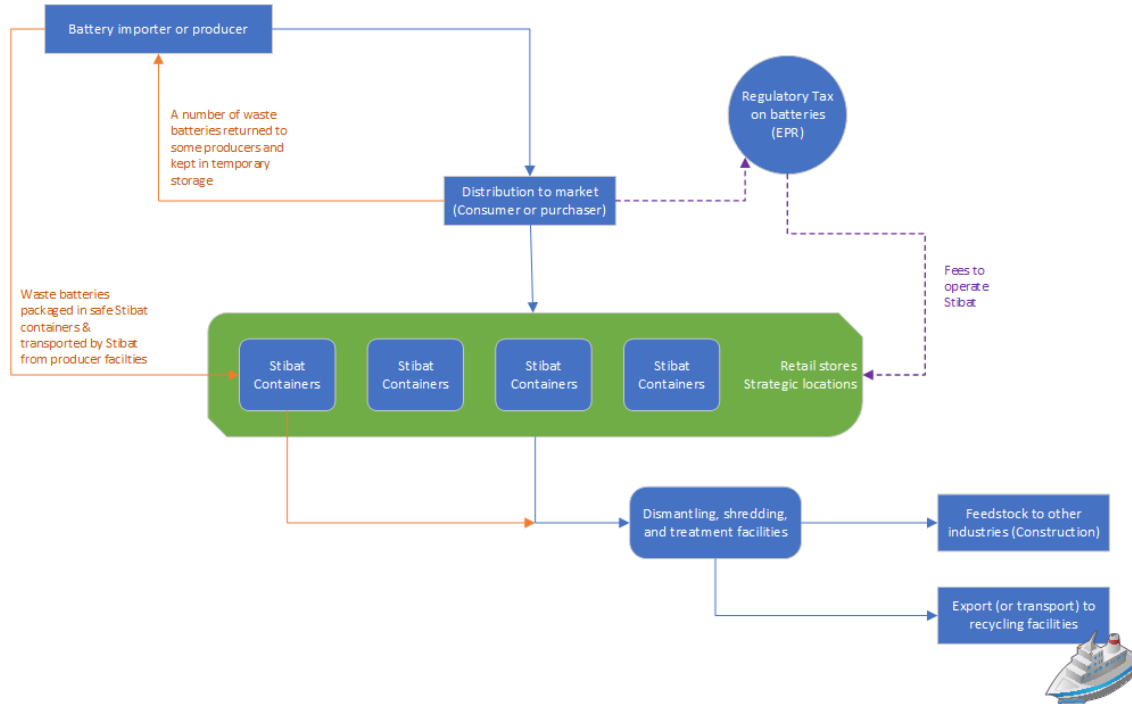


Figure 9 Flowchart of the waste battery management system in the Netherlands

In the United States, Rechargeable Battery Recycling Corp. (RBRC) is an organization that provides public services in the field of rechargeable battery recycling. The corporation administers a nonprofit program, which is the first and sole program of its type in North America, called Call2Recycle. The program is fee-based and collects both consumer batteries and cellphones. The program manages the collection, treatment, safe disposal and reporting which helps manufacturers fulfill their recycling duties entailed by the country and local regulations. It is important to mention that the Call2Recycle program is tailored as per each state or province law to ensure complete fulfillment of recycling responsibilities (Call2Recycle, n.d.). In 2017, the program had around 30,000 collection sites across the US and Canada; this covered around 100 different battery brands and 32 producers participating in the program approved by the Vermont state Stewardship plan, the first recycling program of its type in the USA (Call2Recycle Inc., 2017). One weakness of the program is that it is mainly catered

for the EoL management of rechargeable batteries and not only selected collection sites do accept single-use batteries.³⁸

Proposed Waste Management System

UNDP/GEF report proposes identification of collection schemes and incentives on the basis of the previous experience in Egypt and abroad (for instance the report from the European Portable Battery Association); deployment of collection containers in strategic places awareness campaign to promote collection of batteries. WMRA stated that there is an intention for formulating a new law for EPR (Extended Producer Responsibility) for e-waste.

According to the types of lithium batteries at EoL in Egypt, the following table presents an anticipation of the sources from which EoL batteries can be collected.

Battery type	Local entity where the battery exists
LCO	Consumer homes Corporate facilities Municipal waste dumpsites Waste collection/transfer stations
LMO	Hospitals and medical centres
NCM	Machinery repair workshops
NCA	EV repair facilities
LCP	Corporate facilities
LFP	
Lithium Titanate	
LTS	

³⁸ Sustainability of e-waste Management: Egypt case study AUC thesis - Ahmed Tarek Mohamed

The proposed approach would be considering lessons learned from the Netherlands waste management system, the UNDP/GEF report, and suggestions by waste management experts, and that entails 4 main pillars:

- 1- **Developing a system to specifically identify the current inflow of Li-ion battery quantities:** An assessment has to be conducted on the informal sector to determine the specific quantities of the lithium batteries. This involves also the determination of the final informal disposal destinations.
- 2- **Developing a financial scheme** so as to include a recycling tax on every battery-containing product sold by an importer, seller or manufacturer; and should be considered part of the planned Extended User Responsibility scheme where relevant.
- 3- **Establishment of a joint governmental and social enterprise** entity to deploy collection containers at collection points: collection points should accommodate containers collecting only e-wastes, e-waste containing batteries, or batteries only. The regular collection should be monitored and evaluated against the initial values of the battery quantity inflows.
- 4- **Social awareness campaigns** involving training sessions in corporations, media communication, and awareness campaigns for informal sector players. Changing the culture of the community to care about disposing e-waste in dedicated containers shall require a strategic campaign and considerable timeframe.

Community involvement, contribution, and awareness

Community awareness is considered a major pillar in effective EoL li-ion battery collection/recycling. Upon practically examining the culture in the Netherlands, and the interview with Cleantron, it has been concluded that people are used to segregate wastes, and possess an ethical drive to temporarily dispose of batteries in designated bins all through the country “during the past 20 years”, which was

partially achieved via local media channel commercials. It is reported that children are also educated in a manner to develop such habits of proper disposal.

According to the interview with Stibat, it is estimated that 15% of the li-ion batteries are in household/domestic wastes - after application of the collection system measures. Usually those are separated at waste sorting facilities and landfills.

Though some people still dispose of battery-containing WEEE into domestic/municipal bins, but garbage trucks could potentially catch fire, and thus this implies the necessity of an investigation conducted through the county officials to identify the responsible battery disposer, if the latter has been successfully tracked, they shall be accountable to pay a fine.

Stibat finds that peoples' awareness and education are key to the system's success, that is besides cooperation with municipalities, community/school programs, social media campaigns and incentives where possible. Stibat finds the distance to battery collection points should be convenient or close enough to consumers.

To understand the Egyptian waste battery landscape, and be able to propose a reliable solution, an assessment of the current stakeholders has been conducted and presented in the below table:

Key Stakeholders	Governmental entities: - Ministry of Environment (EEAA) - Ministry of Trade and Industry - Ministry of Finance
	Waste collectors Syndicate - Zabaleen Community
	Waste battery project managers

	Target groups - waste battery owners: Corporations Consumers
Primary stakeholders	Municipalities
	Waste collectors
	Waste Recyclers/exporters
	Electronic devices and battery importers/manufacturers
	Repair shops and workshops
	Educational and research institutions
Secondary stakeholders	United Nations organizations
	Local administrations (Public sector)
	None governmental organizations (Civil society)
	Media companies

Assessment of the Stakeholder power and interests is essential to decide on the effort and potential campaigns required to determine a sound collection process. This is presented in the matrix/graph (Figure 10) below.

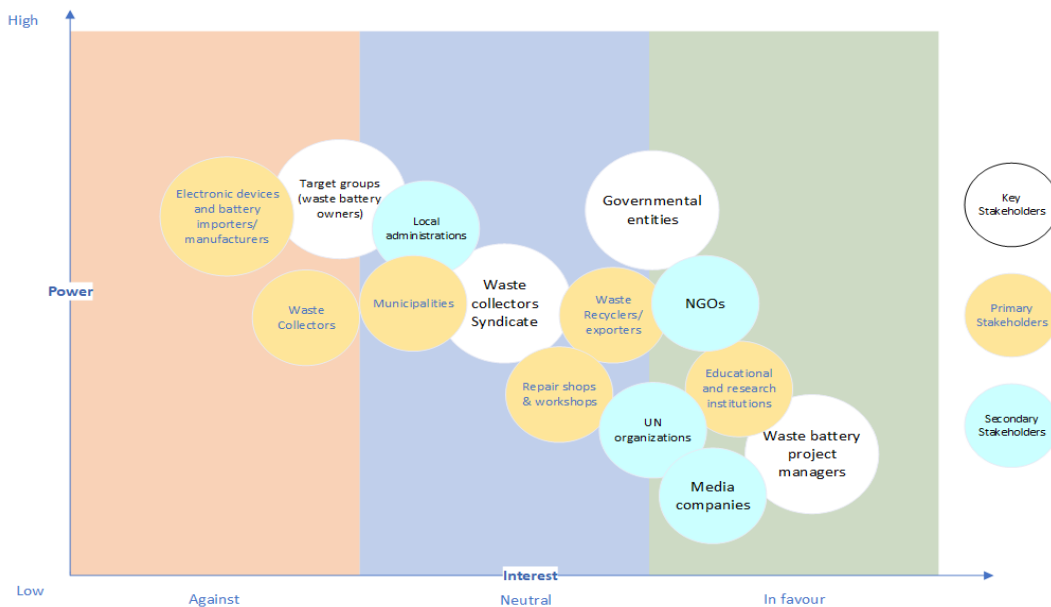


Figure 10 Stakeholder analysis matrix

From the above graph, it is concluded this the greatest resistance to a battery collection project shall be the target groups themselves, the battery producers and a considerable portion of waste collectors (especially informal ones). That is due to great power they possess in the system:

- 1- Target groups (consumers): Power of possessing/owning the consumed batteries, and against the collection system because it requires effort, order, and additional cost on goods
- 2- Producers/battery importers: Power of the primary ownership of the batteries, placing the new batteries in the market, and sustaining the local business environment. They are considerably against an EPR system, additional cost on product posing a reduction in revenue, and additional effort in monitoring waste handling responsibilities.
- 3- Waste collectors: Gain their power from being the waste handlers possessing the waste collection, sorting, and transportation resources. They are potentially against the additional effort of sorting and properly storing the used batteries, and most of all, the legalization of the informal activity.

The three stakeholders shall require a mitigation strategy to influence them being partners for the battery collection system. This is possibly achieved by well strategized awareness and media campaigns (Pillar number 4).

UNDP efforts in 2018 revealed that capacity building components of e-waste management progressed satisfactorily with various stakeholders including customs officers and informal recyclers. The fact that only a few recyclers have approached for the process of “getting approvals” indicates the need to continue the “training” further. The project involved a campaign aimed at creating awareness on e-waste launched on different media (internet, TV, newspapers), providing reference and contact numbers. ³⁹

³⁹ Protect Human Health and the Environment from Unintentional Releases of POPs Originating from Incineration and Open Burning of Healthcare- and Electronic Waste Project in Egypt – (UNDP PIMS#4567; GEF ID 4392) – Mid term review report

Financial components

Economy of scale:

Interview with Cleantron indicate that their communication with Asian battery manufacturers report that the waste li-ion battery quantities deemed feasible for transportation to Asia for recycling into new functional batteries should be equivalent to almost 10-15% of the feedstock raw material quantities (mined lithium and battery raw materials) according to the standard annual production rate of battery cells from raw materials. This also implies the requirement to fill 40 feet shipping containers (with standard volume of 12 x 2,3 x 2,4 m for a 40ft container). The metals produced from urban mining of the waste batteries is intended to be added (in a 10-15% mass percentage) to the main production line system of the battery cells in Asia. This recycling approach proposed by the Korean battery manufacturers is said to be the best financially feasible and technical method to support the main battery cell production process without altering the production system.

Resources:

Interviews with local Egyptian informal waste collectors confirmed that depleted Li-ion batteries have no-low market value. Potential market value in Egypt can be created only if considerable amounts of waste batteries are collected through a wide network, where **sufficient resources** are in place to collect, monitor and transport the battery wastes to centralized facilities. Not to mention the significance of resources and budget to be in place **for raising cultural awareness** and rely on community contribution to the collection process. Improper battery **disposal fines** are another regulatory consideration to stop batteries ending up in landfills and dumpsites.

In the Netherlands, consumers indirectly pay for the stibat collection fee by purchasing the product (battery), therefore, consumers are held responsible by law, to return EoL energy packs to the collector.

Potential local effort:

It is evident that domestic i.e. decentralized recycling will be more profitable than centralized recycling, however, it will take time for the industry to scale up collection, processes and infrastructures. Latecomers are expected to be threatened by the existing industry that may benefit more quickly from the larger economies of scale. Decentralized systems do require a substantial amount of spent li-ion batteries (especially large EV) to reach economy of scale.⁴⁰

Financial components and feasibility of waste lithium-ion battery local recycling projects capable of generating income are still in assessment phase as reported by CEDARE. If local recycling facilities are established based on a financially feasible strategy, it is recommended, by Cleantron, to have a collection, sorting, dismantling and shredding facility in every region to minimize transportation costs; converting defect and EoL batteries into non-hazardous wastes reduced transportation costs. Transportation facilitation (milage) is the major factor to determine where collection points should be placed, and whether a recycling facility should be one single centralized facility or several. Thus, decentralized shredding facilities could be distributed throughout regions, and transportation of non-hazardous battery material is regularly delivered to a central recycling facility.

Initial steps for establishing a local waste collector

As per the battery collection system in the Netherlands and Europe, EPR systems could assist in collecting financial resources from the extra fees placed on products containing lithium-ion batteries. The budget collected by the government could be utilized to establish the resources (collection and transportation containers,

⁴⁰ L. Lander, T. Cleaver, M. A. Rajaeifar, V. Nguyen-Tien, R. J. R. Elliott, O. Heidrich, E. Kendrick, J. S. Edge and G. Offer, iScience, 2021, 24, 102787

vehicles etc.) for the waste battery collector and shredding facilities, and thus the selection and appointment of the waste companies in each region is based on a transparent tender process.

Figure 11 below shows the proposed management system to handle waste lithium-ion batteries in Egypt.

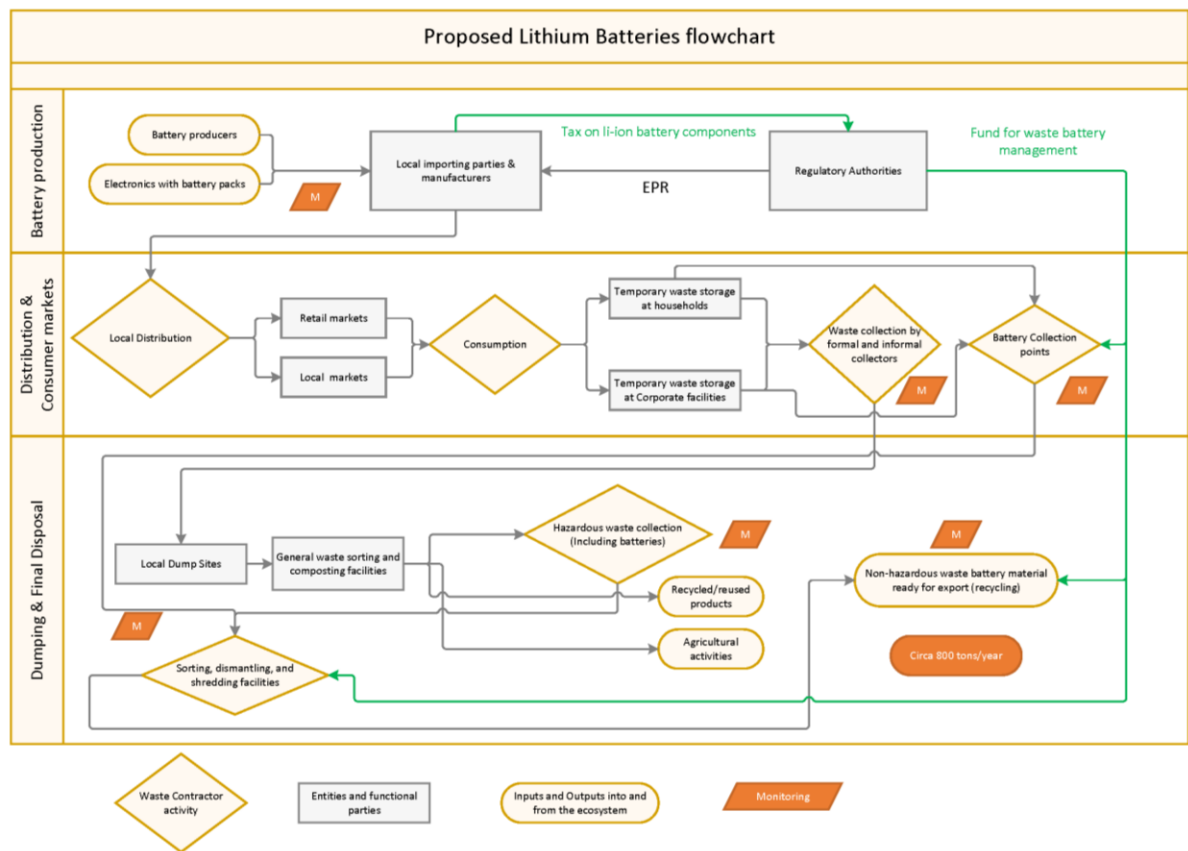


Figure 11 Proposed management system of waste Li-ion batteries

Conclusion

Market research (Assessment of WEEE Dismantling business opportunities) and scientific conclusions (Nageh Allam, 2020, AUC) indicate that lithium-ion batteries are exported for recycling by experienced industries if not already thrown away irresponsibly in landfills, 2) no protocol/policy is set in Egypt to recycle spent

batteries in a safe manner, 3) lithium-ion recycling process still lacks a universal standard and could be dangerous if not handled properly.

Batteries are not a key component in Egypt automotive sector as in Europe, which has set advanced measures via EU directives to maintain sustainable management of waste batteries. But Egypt, as per field surveys and interviews with major waste business players, is in a serious dilemma to tackle the waste li-ion batteries from several electric and electronic equipment. There is an obvious absence of an explicit national regulation or provision addressing the sustainable management of waste batteries in particular, though waste batteries could be defined as hazardous waste falling under the management requirements formulated in the Egyptian waste law 202/2020 and the ERs. There is a possibility that the planned EPR regulation for e-wastes (UNDP/GEF report) could lead to tackling this problem, but no indications have risen to date.

The findings of the local surveys and interviews have encouraged the assessment of the European model in dealing with waste batteries. Hence, actual field surveys and interviews were held at the Netherlands, where it has been concluded and groundtruthed:

- 1- Sound waste battery collection systems were in place supported by online guidance and a number of national organizations (Stibat)
- 2- Considerable public awareness is supporting the waste batteries collection; awareness is developed by media channels and reported to be effective
- 3- Resources for waste battery collection, sorting, and shredding are nationally available and effective
- 4- An EPR system is place, and battery producers have a clearly defined responsibility to submit waste batteries for further waste processing and use in other industries

An essential factor in determining the methodology of handling and recycling li-ion batteries at EoL is the identification of generated waste quantities. There are no clear quantitative assessments of imported lithium-ion batteries nor annually generated waste batteries, but some references were used to conclude guiding estimates. One of the local sources in the WEEE management business reported that 4.5 tons of li-ion batteries are collected annually, and a United Nations University report indicate that Egypt generates circa 7,400 tons/year of domestic e-waste collected (and registered) by formal recyclers; as components in WEEEs. This concludes that over 90% of waste li-ion batteries are either improperly disposed, unregistered, and definitely managed with unsustainable measures. Huge waste li-ion batteries are sold in auctions to waste management companies in Egypt without a developed chain of custody documenting and clearly registering the types, sources, and quantities for further assessment. Investigation in the local market indicate that the system of recycling waste li-ion batteries would only be feasible if quantities are sufficiently abundant to bear the cost of local recycling (to the extent of dismantling, sorting and shredding) and exporting. In the light of the above, battery collection is the main aspect to define the sustainability of the management system in Egypt, as it presents the main bottleneck requiring mitigation measures mainly encompassing community inclusion, raising public awareness through strategized campaigns, and training programs.

Accordingly, a brief stakeholder analysis of the main players in the Egyptian waste li-ion battery landscape was conducted, the results of the analysis concluded that three stakeholders should be encouraged to support the collection and EPR process: consumers, producers/battery importers, waste collectors.

A proposed solution is concluded from the above investigations and literature review and includes the national actions below:

- 1- **Developing a system to specifically identify the current inflow of Li-ion battery quantities**
- 2- **Developing a financial scheme** so as to include a recycling tax on every battery-containing product sold by an importer, seller or manufacturer
- 3- **Establishment of a joint governmental and social enterprise** entity to deploy collection containers at collection points
- 4- **Social awareness campaigns** involving training sessions in corporations, media communication, and awareness campaigns for informal sector players

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Acknowledgment

We extend our sincere gratitude to Stichting Stibat Services and Cleantron (The Netherlands) for their invaluable assistance and open communication. Special thanks are due to Ms. Wendy Wielink, Projects and Safety Coordinator, and Cleantron's Managing Director, Mr. Maurice Van Giezen, for granting us the opportunity to investigate and ground truth waste battery management systems.

We also value the efforts and encouragement provided by the Embassy of the Netherlands in Egypt.

Furthermore, we would like to express our appreciation to the following experts for their generous cooperation in facilitating interviews:

Mr. Karim Dabous (E-Tadweer)

Mr. Abdallah El Etriby (Waste Management Expert)

Mr. Amin Hassan (Waste Collectors' Syndicate)

We also wish to acknowledge the research and efforts of the Ministry of Environment, CEDARE (Center for Environment and Development for the Arab Region and Europe), and the dedicated researchers whose contributions have been influential in reaching our conclusions, which we consider a contribution to our national Sustainable Development Goals (SDGs) and has significantly enriched this scholarly endeavor.

Joint Ventures as a Strategy of Decarbonization in The Maritime Industry - Challenges & Opportunities

Felipe Villasuso – Senior Compliance Officer/ PhD candidate at LSBU

Conceptual Abstract⁴¹

Maritime is a key industry to implement decarbonisation. According to the International Maritime Organisation ('IMO'), the Maritime energy demand has been accounted for around 1 billion tons of CO₂ and 3% of annual global greenhouse gas ('GHG') emissions on a CO₂e. This research intends to assess the challenges and opportunities of the Maritime Joint Ventures ('JVs') considering the increasing popularity of JV announcements to focus on decarbonisation and the relevance of the Maritime sector on emissions as it accounts for 3% of annual GHG emissions on a CO₂e.

The research considered a benchmarking analysis of markets practices across global and local Maritime companies with respect to their practices on their JVs with focus on decarbonisation. Some of the questions to address are with key players of the Maritime industry are: What kind of disclosure has been in place? Have they been disclosed at the JVs partners' own ESG reporting?

Such study shall benefit and guide the literature, Maritime professionals, regulators and overall Maritime stakeholders in the UAE market and globally which are in need of further assessment of the complexities of JVs, with its challenges and opportunities to reach ambitious decarbonization goals. JVs must be carefully managed as the requirement of transparency has become more important in terms of ESG reporting.

From one side, with respect to opportunities, JVs have been an important tool for the development of business as they allow having an effective joint management of collective resources, funding, know-how, technology, greater sharing of network and knowledge of a local market. JVs also provide the

⁴¹ The wording has been slightly adapted in relation to the approved abstract, as the benchmarking is not taking place via survey questions anymore due to unavailability of candidates with the required skill in the UAE.

opportunity to access new markets, distribution networks, increased capacity, risk mitigation, effective cost/liability sharing, cross-selling with synergies between JV partners and their clients. On the other side, with respect to challenges, JVs not always have the same governance standards as subsidiaries as sometimes they are not consolidated in the financial statements which can result in less oversight from the shareholders. JVs can also have potential conflicts of interest situations as they usually have JV partners as suppliers, operator and/or contractor, particularly where they can provide the technology. By understanding the above complexities, stakeholders will have appropriate tools to ensure that decarbonisation targets are met to ensure compliance with the IMO and the Sustainable Development Goals. Leaders must be prepared for the new challenges and explore business opportunities to ensure that companies implement that appropriate path to satisfy the new requirements.

Background, Context, Problems and Propositions

The essential background of this research concerns the use of JVs, which are the most suitable legal arrangement for risk mitigation in the Maritime Industry, which reflect in different Environment Social and Governance ('ESG') risks than their JV partners/shareholders, as a strategy of decarbonisation. Given the unavailability of professionals to carry out the proposed survey mentioned in the conceptual abstract, specific suitable public case studies have been selected and highlighted in detail in the appendix.

According to S&P Global Ratings (2019), ESG risks of JVs are an increasing concern among investors, who no longer appear willing to accept certain behaviours as the cost of doing business. Furthermore, high quality ESG information and disclosures are imperative to ensure that the information of JVs is

effectively captured in such reports and appropriately understood by investors and overall stakeholders of the Maritime industry.

Pursuant to this background, the overall objective of this research is to contribute to knowledge with respect to the challenges and opportunities of the decarbonisation of Maritime companies via JVs, pursuant to addressing the following propositions:

1. What kind of disclosure has been in place?
2. What are the challenges to ensure effective implementation of decarbonisation policies throughout JVs?

In order to fulfil particular aspects of the above background and objectives, the following research literature review has been developed.

Research Aims and Objectives

Taking into account the background and respective propositions, the overall aim of the research is to contribute to knowledge within the realm of sound corporate governance pursuant to the assessment of Maritime JVs and their decarbonisation strategy.

Thus, after some preliminary assessment of potentially helpful theories, initial research indicated the Agency and Stakeholder Theories to be appropriate theoretical frameworks. This theory helps determine knowledge by evaluating relevant empirical research data and obtaining fresh insights relating to the corporate governance of Maritime JVs for an effective decarbonisation strategy.

Research Relevant Literature

The initial literature review has enabled a grounding base within which to accommodate the research objectives and to develop an appropriate research design and methodology. It is noted that theories explain and possibly predict outcomes, based on the variations across the available data (Tan, 2008; Tan and Jolani, 2022 & Saunders et al., 2023).

- *Empirical Considerations*

It is helpful to investigate appropriate empirical evidence. In this regard, whilst JVs are an important vehicle for Maritime companies to diversify their risk/portfolio, they also expose them to a range of ESG reputational, issues and risks. In part, this is a consequence of increased possibilities in terms of issues of bribery and corruption, conflicts of interest with other JV partners, and human rights/environmental risks. Williams and Le Billon (2017), Bamford (2021), Fowler (2021) & the Global Reporting Initiative (2021), all provide much support for such evidence and reasoning.

Additionally, Lopez-de-Silanes et al (2019) provide empirical evidence demonstrating that both good quality corporate governance and ESG reporting improve a firm's corporate behaviour and financial performance. Equally, Freeman and Evan (1990) provide evidence indicating that companies with better ESG performance and take good regard for their wider stakeholder community reflect better financial performances and better valued in the market, compared to those in the same sector that take only limited regard for their comparable stakeholders.

With respect to the decarbonisation, the UAE (2022), Net Zero 2050 is a strategic initiative that drives national strategies towards net-zero emissions by 2050 which will make UAE the first country across the Middle East and North Africa (MENA) to

achieve net-zero emissions.

A relevant framework of decarbonization is called Green Corridor, which is an arrangement that can count with JVs although it's not mandatory as other legal arrangements can be considered, such as the consortium. It follows the best practice within the shipping industry and scale up small-scale successful decarbonization projects into large-scale ocean-going shipping and maritime supply chains. In this context, the term 'green' pertains to emphasizing emissions reduction, potentially involving a transition from low-carbon fuels to greener alternative fuels. Maritime decarbonization hubs provide independent evidence for the shipping industry and inform decision-making for low emissions vessels. Green corridors involve specific trade routes between major port hubs that support zero-emission solutions as a way to accelerate decarbonization (Joeress, et al., 2021).

According to McKinnon, 2018, such a framework maps the complex interrelationship between the economic output of a country or a company and the logistics-related environment effects and costs pursuant to seven parameters: 1) Model split (proportion of freight carried by different transport modes; 2) handling factor (ratio of the weights of goods); 3) length of haul (length of each link in the supply chain; 4) empty running (percentage of vehicles travelling empty); 5) load factor (volume of products density); 6) energy efficiency and 7) GHG emissions. He completes that these parameters, however, may have interests conflicted when making trucking more carbon efficient by raising load factors and fuel efficiency which makes harder competition for the freight market.

By way of analogy with the Egyptian maritime sector, Younis (2017), recognizes such governance issue of conflict of interest and recommends that separation between the ownership and administration - such as Al Sokhna Port, and those managed by governmental concept under the Port Authorities, such as Al Adabiya,

to achieve commercial terms and ensure fair competition between such ports

Although there is no clear green corridor policy framework in the UAE. There are developments meant to realize a cohesive framework in the future (e.g., hydrogen economy). The UAE will become a critical competitive maritime hub, which can open channels for the UAE active role opening collaboration with other nations. As a result, UAE is seeking collaboration with other governments to reinforce the adoption of hydrogen fuels and technologies. For instance, Canada and UAE are the first countries that back the green fuel initiative for the maritime sector (International Chamber of Shipping, 2022). The initiative seeks to facilitate knowledge and information exchange on programs, policies, and decarbonization projects to accelerate the deployment of commercial fuels and technologies for other countries to follow.

Independent initiatives such as Emirates Global Aluminum (EGA) and Kawasaki Kisen Kaisha ('K Line Group') began cooperation in 2022 on decarbonization of bulk cargo shipping (Ismail, 2022). The cooperation brings the two largest shipping groups together for research and initial pilot projects that will decarbonize bulk cargo shipping. Suggested solutions include kite systems, CO₂ capture technologies, and alternative fuels. "K" Line Group will focus on research towards decarbonization opportunities while EGA carries out pilot projects on "K" Line shipping routes, 5 million tons of EGA's bauxite is transported by "K" Line Group each year from Guinea to the UAE, and 1.5 million tons of alumina from Australia to UAE each year (Ismail, 2022).

Moreover, the Emirates Shipping Association (ESA, 2023) began a dialogue for a sustainable future. The group involves industry players, experts, and stakeholders for connections, idea exchange, and the formation of valuable partnerships. ESA seeks to set UAE as a global maritime hub. The maritime dialogue recommended

key priorities including, the UAE registry as a Flag State, the reinforcement of decarbonization efforts in the industry, reinforce the sector's world-class status in anticipation of the upcoming UAE Maritime Law. It shared insights from the International Chamber of Shipping and COP28 teams. Subsequently, the discussion led to collaboration, and exchange of knowledge, and set UAE on the frontline in a global maritime arena (Zawya, 2023).

- *Theoretical Framework*

The two identified theories (Agency Theory & Stakeholder Theory) appear to take regard for issues typically germane to JVs as the intrinsic principal-agent model relationship between and among JV partners and the overall stakeholders might illuminate the issue of spreading political risks by having concessions in a few political stable countries as pointed out by Victor et al (2014).

Reflecting on such Theories, Chavelas (2011) contends that when Boards of Directors employ better and more embrative monitoring tools, there are fewer agency problems encountered between them and the management and shareholder community (as envisaged within Agency Theory). This potentially leads to better financial reporting and sets up a sustainable and efficient value-creation process -that is beneficial to all stakeholders (as envisaged within Stakeholder Theory).

Equally, the Stakeholder Theory broadens the scope of the principal-agent relationship, which is imperative to investigate the interests of the overall community and not only the shareholders of the planned listed entities of this research. There is evidence that companies with better ESG performance have better financial performance and are better valued in the market compared to their parts in the same sector, as highlighted by Freeman and Evan, (1990).

On the other hand, whilst there are other important theories that can relate to the research subject, such as, for example, the Legitimacy Theory, which represents managerial and ethical motivations of Corporate Social Responsibility ('CSR'), and the Signalling Theory, which represents the quality of information between certain parties, they are not relevant for this research which is materiality based on the principal-agent relationship in JVs of Maritime Companies and their overall relationship of their stakeholders.

Given the above considerations, it is evident that the Decarbonisation strategy relies on the development of JVs either to support with risk mitigation or to establish alternative corporate structures, as the Green Corridor. In this context, effective and transparent governance is key to mitigate conflicts of interest and ensure appropriate interaction with the relevant stakeholders.

Research Methods & Methodology

Research paradigm

The planned research is to predominantly use an interpretivist (interpreting the meanings that human actions on the governance of Maritime JVs and their decarbonisation) philosophy - so employing a (mainly) inductive approach, with an axiology that examines the small sample of selected cases studies of the most relevant maritime companies based globally.

Research approach

As stated afore, in the main, the research is to employ an inductive approach. It will initially employ an inductive (pattern recognition/explication of selected JVs case studies within the Maritime industry) approach. This will enable the possibility to confirm/reject and/or further examine and question the appropriately spawned

research propositions as previously stated.

Research strategy

Fundamentally, the research is an archival research exercise. It has drawn virtually all it requires data from archived (electronic and/or physical) repositories.

Research Time-Horizon

The research data has been obtained from recent news, media releases and overall websites of the selected maritime companies. To that extent, the research follows a cross-sectional approach.

Data Considerations

Data (Cases/Variables) Sourcing, Collection, Ethicality and Limitations

Research Cases

To the extent that maritime companies are subject to several types of disclosures, the research investigated only those related to JVs that can have relationship with ESG risks and decarbonisation strategy.

Data Sourcing (Identification/Selection of Cases)

Saunders et al, (2023) describe the population as the “full set of cases from which a sample is taken”. Accordingly, in this research the source population is potentially and substantively the most relevant Maritime companies based in the UAE and public information concerning their JVs disclosures and sustainability reports.

Data Ethicality

With respect to the issue of ethicality, it is appropriate to state that all the collected data is sourced from publicly accessible sources. Accordingly, such data is

accessible to and by, all different stakeholders. Thus, no ethical issues relating to data confidentiality and privacy are envisaged.

Data integrity (reliability and relevance)

The research itself is predicated on publicly available sustainability reports of the investigated companies which are subject to external audit.

Data Limitations

With respect to key limitations, the first one to highlight is that all the information is from 2021 and further changes in the companies' strategies and practices might be in place once this research is published.

The second limitation is the sample size which is limited to only the identified 7 maritime companies that have provided further details of their JV practices in the public domain. Nevertheless, the section of Data Analysis (immediately following) gives some further details as to how these limitations are managed.

Data analyses

Overall, the research employed a qualitative analysis. Based on the data obtained with the selected maritime companies, it is evident from that only a minority of the Maritime companies subject to the benchmarking do disclosure the governance and relevant ESG risks of their JVs. Equally, the strategy for decarbonisation JVs has only been disclosed by a few Maritime companies. Furthermore, it would be extremely important for overall stakeholders to understand what activities are the JVs undertaking and whether there is appropriate control as well as clear strategy for decarbonisation of their activities, similarly to the other entities under the same group.

Findings

Earlier chapters of the thesis set out that its fundamental research propositions towards: (i) the kind of disclosure has been in place; and (ii) the challenges to ensure effective implementation of decarbonisation policies throughout JVs, which often give rise to conflicts of interest situations, even between governments, as described above in the case of green corridors. The answer to these questions was sought based on the relationship of the Agent and Stakeholder Theories which reflect the quality of the corporate governance and relevant disclosure to mitigate situations giving rise to conflicts of interest or mitigate ESG risk of Maritime JVs.

In that context, it has been noted that only a minority of the Maritime companies subject to the benchmarking do disclosure the governance and relevant ESG risks of their JVs. Equally, the strategy for decarbonisation JVs has only been disclosed by a few Maritime companies. Furthermore, it would be extremely important for overall stakeholders to understand what activities the JVs are undertaking and whether there is appropriate control as well as clear strategy for decarbonisation of their activities, similarly to the other entities under the same group.

Furthermore, the Decarbonisation strategy relies on the development of JVs either to support with risk mitigation or to establish alternative corporate structures, as the Green Corridor which reinforces the importance of effective corporate governance.

Research Originality and Policy Contributions/Implications

It is likely that when completed, the planned research will make a significant contextually bound contribution to knowledge in terms of the quality of ESG disclosures within the overall domain of governance. And, this it will do while

employing an Agency and Stakeholder theoretical perspective.

Investors/Shareholders/ESG analysts:

Given the growing body of “ethically directed” investors within the investment community, the ESG insights revealed in the prior paragraph will enable them to make decisions that accord with their particular sensitivities and ethical mind set. Additionally, they will be enabled with some measure of corporate assessment in order to hold relevant Boards of Directors to account - or at least to highlight their (in-) actions.

The research analysis and its benchmarking will allow investors to assess whether investment policies being applied by the relevant sets of Maritime Companies result in, and duly create, enhanced value-added opportunities for investors. In part, this will likely be a consequence of investors being able to understand ESG risks and their attached investment hazards and opportunities.

Key Stakeholders:

Equally, these same insights will “throw a light” on matters relevant to the wider stakeholder community and enable them to also call for appropriate corporate remediation and/or accountability.

Regulators and policy makers:

By comparing practices across the Maritime Industry Globally, this research will allow regulators and policy makers to work for, and contribute towards, a consistent approach in the reporting of Maritime Companies JVs. Equally, the completed research could also enable enhanced guidance in term of ESG disclosure for Maritime Companies JVs in term of effectiveness of their related governance frameworks.

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Appendix - List of Maritime companies subject to benchmarking analysis with respect to their Joint Ventures practices as a strategy of Decarbonisation

Company	Market	Disclosure of JVs	Disclosure of ESG Risks and Governance
1. Scorpio	Tanker	There is no JV disclosure noted in the sustainability report.	- ESG disclosures based on TCFD ESG standard. - There is no reference to ESG in the Committee structure.
2. Teekay	Tanker	Teekay Tankers also owns a Very Large Crude Carrier (VLCC) through a 50 percent-owned joint	- Provided climate related disclosures under TCFD, GRI and SASB standards. - Only stated that ESG is part of the Board agenda with no Committee mandated for that
3. MISC	Tanker	Only reference to JVs as mechanisms of oversight. No reference of decarbonisation	- ESG disclosures based on TCFD ESG standard - Sustainability and risk committee reporting directly to the Board
4. Mistui	Tanker	JV with Italian CEA to verify the production and sales capabilities of facilities for growing crops in a controlled environment, in anticipation of future large-scale production. Although the consumption of fresh produce is on the rise in the Middle East, the harsh local environment	- Provided climate related disclosures under TCFD and GRI standards. - Sustainability Committee reports to a management committee
5. Safe Bulkers	Dry Cargo	There is no JV disclosure noted in the sustainability report.	- ESG disclosures based on GRI standard - ESG is not a Board matter
6. Star Bulk	Dry Cargo	There is no JV disclosure noted in the sustainability report.	- ESG at Board level
7. Genco Shipping	Dry Cargo	In 2021, a JV with the Synergy Group, to increase visibility and control over vessel operations, increase fleet-wide fuel efficiency through an advanced data platform to lower our carbon footprint.	- Provided climate related disclosures under TCFD ESG standard. - An ESG Committee was established but it's not a Board committee.

The Regional Middle Powers: Prospects on Re-Identifying the International System

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Abstract:

At a time when the international system was dealing with an unprecedented crisis, the war in Ukraine broke out. At the intellectual and governmental levels, the international system was in crisis. The United States presided over a unipolar world following the conclusion of the Cold War and the fall of the Soviet Union, but this structure of the international order did not hold up all that well, particularly over the past two decades.

The conflict in Ukraine served to draw attention to the difficulty in describing and identifying the structure of the contemporary international order. As a result of the political machinations they engage in to advance their interests and maintain stability during these tumultuous times, middle powers and regional middle powers play an important role in defining the characteristics of the international system. Examining the nations' votes on the General Assembly resolutions on the conflict and reviewing its remarks that endorsed the balance between the parties can help identify the middle power's policy of remaining neutral for as long as feasible.

As a result, the analysis will look at the following questions: What part did the middle powers play in the conflict? What recent developments/fields have given MENA's middle powers/regional middle powers the chance to participate in global affairs? What are the trump cards that middle powers can play? What are the international organisations and tools that make this possible? Whether through a vote in the General Assembly and Security Council of the United Nations? Or through the coalitions and alliances it created during the first year of the conflict? Is it possible for the middle powers

in the region to exert more or less pressure on the main warring parties? Using the "balance of relations" strategy rather than "balance of power," were the regional middle powers actually able to advance their own interests without major confrontations with the super powers?

Introduction

The response of the Arab countries to the repercussions of the Russian-Ukrainian war constituted a fundamental challenge to the nature and the roles of the active regional powers during the first year of the war.

The countries of the region have continuously and decisively sought to ensure that this war does not undermine their relations with the major direct parties of the global conflict resulted from the war, such as the United States and Russia, and the indirect parties, such as China and Europe.

Accordingly, the foreign policies of the countries of the Arab region witnessed intense dynamism to avoid alignment equations that might be imposed on them by one of the parties, taking advantage of a climate free from the restrictions of ideological affiliations that characterized the stagnation in the bipolar system during the Cold Warⁱ.

As the Cold War between the Soviet Union and the United States did not give the medium and small powers at that time an opportunity to maneuver among themselves for a long period until they settled on supporting one party against the other.

These conditions are not provided by the existing global intellectual, economic, political and security structure in a globalized system that is highly susceptible to continuous and perhaps contradictory changes.

During the first year of the war, it seemed that it had provided an opportunity for some countries in the region to maneuver on specific issues in order to enhance their position and influence, the effectiveness of their policies, and the protection of vital interests, especially in moments of complex regional crises, which affects the changing geopolitical landscape of the region and the re-definition of the region's security agenda.

So, the effects of the Russian-Western confrontation appeared in the balanced behavior pattern of what might be called the "Regional Middle Powers" in the Arab regional system, which provided opportunities and also imposed challenges to strengthen their position in their geopolitical landscape and consequently the international one.

The Research question:

The main research question is represented by the following questions: What is the impact of the Russian-Ukrainian war on maximizing the roles of the middle regional powers in a way that protects their interests and ensures a policy of balance between the two sides of the conflict? How do the middle regional powers try to strengthen their neutral position through movements with other powers within the region? Was the policy of balance and neutrality during the first year of the war able to achieve regional gains for the middle regional powers, or did it constitute a further restriction on their movement? How did this policy adopted by the middle regional powers contribute to restructuring the dynamics of interaction among the countries of the Arab regional system during the first year of the war?

Methodology:

To answers the previous questions, the study will depend on the traditional definitions of hard power, but without placing too much weight on structural explanations.

That is, by examining the flexible sources of power, which are represented by the leverage and influence that these middle powers possess, and by using diplomatic abilities to promote regional peace, stability, and security by adhering to strategies based on balance of relations (BoR), which can more effectively protect its vital interests related to its own security.

Conceptual grounding:

Talking about the role of middle powers, regional powers, and emerging powers is fundamentally linked to the structure of the international system and their relations with super and major powers, as the earliest definitions of middle powers refer to them as those countries that have sufficient power to take positions without the help of other countries.

Hence, all attempts to understand the role of these powers proceed from this point, but this established definition for what comes next remains confined to a limited understanding of the role of middle powers and regional powers that depend on their relationship with major powers and over-reliance on hard power standards primarily in determining the areas of role and ability to influence in the context of their interactions in the international system.

However, since the end of the Cold War, the view on the role of regional and middle powers has evolved. From a perspective that focuses the analysis mainly on the sources of hard and material power, to a perspective that moves away from reliance on material economic and military capabilities and strategic location and focuses primarily on non-material sources in order to understand and analyze the sources, areas and arenas of action of middle powers in an international landscape in which regional influence is growing and increasing.

International interdependence, multilateral cooperation, increased reliance on international institutions - sometimes even the driving force behind the process of

building institutions and blocs - and the emergence of interest in a range of non-security and military issues on the international scene.

It should be noted here that writings on multilateral institutions have contributed at the theoretical and academic level to creating theoretical foundations for understanding the role of middle powers in the contemporary international system during the 1990s; that is, under the unilateral system that was dominated by the United States after the collapse of the Soviet Union, taking into account that the activity of middle powers increases under an international system characterized by flexible unilateralism, which enables them to take more independent positions in the face of major units and dominant powers, alleviating the intensity of competition, international polarization, and strategic stagnation that hinders the resolution of conflicts and crises and stands in the way of efforts to build a sustainable, comprehensive and stable global system.

The definition of middle power from this standpoint is based on three indicators that allow for measurement and expand the sources of middle power to include indicators that broaden the sources of hard power; Capabilities and Power.

The two criteria tend to generally favor the sources of hard power, but when the criterion of influence or leverage is placed next to them, it tends to favor the sources of soft power and transfers middle power to a regional power in the opinion of many scholarsⁱⁱ.

Accordingly, the middle powers, in this sense, have access to military power, economic resources, and a geographical positions, this equation convinces the major powers to mobilize the middle powers to its side and request their support in times of peace, and during the time of war and conflict as well.

Although these middle powers are unable to enter into a direct confrontation with the major power, they may cause some critical damages, depending on how the other states in the international system recognize and accept the position of

this middle power, which means that some of its strength comes from the strength of its alliances and partnerships.

In addition to conventional criteria that rely on a pattern of foreign policy that uses diplomatic power to support regional and global peace and stability, influence significantly relies on unconventional criteria. This boosts its capacity to explore international cooperation partnerships and coalitions. In this situation, middle-power diplomacy is distinguished by three key characteristics: These are what they are;

- A- Its search of multilateral (collective) solutions to global issues and its advocacy of this course of action through international organizations or through preexisting regional blocs.
- B- a tendency to adopt cooperative stances in international disputes and avoid establishing antagonistic coalitions at the global scale by adopting independent stances, in what is known as strategic autonomy, particularly in the face of highly divisive geopolitical issues.
- C- Due to its leaders' conviction that the state cannot effectively influence alone but can influence effectively by working with a group of other middle or regional powers, it has a tendency to form alliances with other middle powers to support its fundamental values and issues of maintaining international peace and security.

This is in addition to focusing the analysis of the external behavior of the middle powers on the global issues in which the state invests its knowledge, capabilities, skills and international standing and which is increasingly linked to the principles of maintaining international peace and security by undertaking initiatives and building alliances supporting these initiatives, and acting as a mediator in disputes between the combatting parties, in addition to their efforts in humanitarian files related to issues of conflict management and peacekeeping, are based on protecting the international system from the threats it faces in light of the

relative lack of hard power sources and achieving a surplus in soft power sources with a strong moral and value base that has enabled them to define their identity on the international level over decades.

Studies and writings generally concentrated on the role of middle powers within the international system and from the perspective of their interactions with the hegemonic power and the super powers, while regional dimension of the role of the middle power were less common in the writings of researchers over the past two decades, despite their importance and direct impact in the regional contexts of cooperation frameworks as well as the explosive international conflicts.

From this point, characteristics of what can be referred to as "regional middle powers" start to appear.

But the "regional middle powers" overlap with what some studies have called "new middle powers," such as Brazil, India, and South Africa during and after the Cold Warⁱⁱⁱ, to distinguish them from the "traditional middle powers" that emerged at the beginning of the Cold War, such as Australia, Canada, the Netherlands, and New Zealand^{iv}.

These traditional middle powers frequently adopted global issues with a humanitarian orientation while acting in roles required by its international dimensions, beyond the boundaries of its regional surroundings^v.

This overlap results from the fact that both traditional and new middle powers use the same approaches and their foreign policy' diplomatic elements are comparable.

While the "new middle powers" are distinguished from the "regional powers" in light of the identical strategies and roles for each of them, the former exercises regional influence and leverage and from there proceeds to try to bring about a fundamental change in the international system in a comprehensive and not gradual manner, in

cooperation with other middle powers as well as with some major or emerging powers^{vi} in the international system, such as China, for example, as recent international transformations have emphasized the effectiveness and independence of these powers, especially the countries of the South, which reject the tendency of contemporary international polarization that stands in the way of efforts to build a just and comprehensive international system.

In light of the unprecedented challenge to the unilateralism system represented by dissatisfaction with the movement's lack of independence and lack of respect for the choices of middle powers, researchers have described it as a "regional power with a global role" to some extent; However, this expression confounds the primary classification criteria that were previously mentioned, as the general criterion for classifying "traditional middle powers" is essentially questioned.

While the criteria for evaluating the new middle powers are primarily related to the regional context and the responsibilities they bear in directly preserving regional peace and security, from there it is possible to move on to the global role, which aims to alter the rules of the unilateral system and push it towards multilateralism or greater flexibility^{vii}.

Here, the study indicates the importance of disengaging and overlapping between the concepts of the new middle powers and the regional powers, which contributes to identifying the features of what is called the "regional middle powers," and then providing a reading in the context of the Arab regional system during the first year of the Russian-Ukrainian war, as the time frame of the study; because of the unprecedented pressing challenge it presents to the structure of the international order that has existed since the end of the Cold War.

When identifying the characteristics of what are referred to as "regional middle powers," it is important to disengage the concepts of new middle powers and regional powers.

Starting from the assumption that the regional middle powers' influence on the direction of regional interactions and their regional activity in border regional interactions that fall within the spheres of their vital field and strategic interest, which intersects with the interests of the major powers and the dominant power in the international system, is fundamental and in principle what gives rise to their status, The middle powers' conventional strategies are centered on diplomatic influence, unconventional power sources, and multilateral frameworks.

such that, in contrast to the new middle powers' direct impact and the removal of the "international influence" component from the core of the categorization of regional powers, their effect on the policies of the dominant and large countries is indirect.

If Samuel Huntington's structural proposal regarding the idea of regional middle powers shows that the hegemonic power's unipolar structure has forced the middle and major powers to adopt policies that tend to break this unilateral pattern and work towards strengthening limited multilateralism or flexible unilateralism, especially in the area of their region. In order to influence the world agenda indirectly, or at the very least to reduce polarization, this idea focuses on the regional context of defending interests and growing power.

The tendency for "middle regional powers" to show caution has increased with the escalation of conflict between the hegemonic power and the rising powers and the growing importance of alignments on competitive geopolitical issues, particularly in light of doubts about the degree of the hegemonic power's commitment to the allies in the international system whose foundations were laid against the backdrop of unilateral policies based on maintaining national interests in recent years^{viii}.

The greater the scope of power and influence in the geographical environment, the greater the ability to protect the policy of balance and neutrality and thus bring about a fundamental change in the rules of the game in the international system, its structure and the paths of its development in the medium and long term.

This proposal focuses on the regional context of protecting interests and building power as the primary factor and primary space for indirect influence on the international agenda, or at least to neutralize polarization.

However, this is related to the existence of a power diffusion pattern in a dynamic strategic environment. It works to achieve stability and balance between conventional and unconventional security strategies in a way that broadens the scope of the regional middle units' operations and increases the scope of their effect.

Additionally, it prevents these regional middle powers from having to face hegemony directly or from being obliged to do so in a way that is contrary to their own national interests.

This study then provides a reading in the context of the Arab regional system during the first year of the Russian-Ukrainian war. because it poses an urgent and unprecedented threat to the foundation of the international order that has been in place since the Cold War's end.

The goals of regional middle powers in a polarized climate.

Accordingly, in order to play an effective role in a polarizing environment, we will generally adopt the criterion of neutrality from both sides of the dispute and their allies while dealing with the views and actions of the average regional powers.

However, the subject of the study is still up for discussion in order to develop and test deeper and more accurate indicators that allow us to understand the necessary function for the average regional powers^{ix}; its domains, the boundaries of its efficacy, its objectives, its tools, and its strategies, which require quantitative analysis in addition to qualitative analysis in order to control the directions of analysis and establishes non-quantitative standards and non-traditional sources of power, such as the interconnected nature of relations in the region, such is the connectivity of the region's relationships, a tangible factor that makes it possible to assess the effectiveness of the role of regional powers in the area, the potential routes to maximize this role, and the obstacles to its geopolitical networks.

Hence, the paper will be limited to an attempt to determine the role of the powers that adopted a policy of balance and neutrality towards the two sides of the conflict in the Arab regional system during the first year of the Russian-Ukrainian war as a limited temporal and interactive space that allows testing the concept and then expanding it as the time period for testing expands.

Approaching these powers' capacity to accomplish the following objectives will help to test the hypothesis:

- 1- Maintaining the policies of balance and neutrality (strategic hedging policy).
- 2- Maximizing strategic interests (building bridges).
- 3- Ensuring regional security and stability (achieving stability).
- 4- Resolving the crises in the region or at least preventing their aggravation (protecting the principles and norms of international peace and security).

1- Maintaining the policies of balance and neutrality (strategic hedging policy).

The Arab countries faced a serious challenge as a result of the new circumstances brought about by the Russian-Ukrainian war, which was the

most critical crisis the international system framework had seen since the Cold War.

Given the escalation of the rivalry between the West and Russia, the United States and China, it contains serious signs of the beginning of a change in the global balance of power. The first year's interactions showed The region's countries often have a propensity to strike a compromise between their long-standing friendships with the West and the extent of their expanding ties with Russia and their solid economic alliances with Beijing in order to avoid conflict, in what may be described as a neutral and balanced approach^x.

The policy of balance and neutrality that has characterized the behavior of the units of the Arab regional system comes from the existence of well-established and traditional relations with the West in parallel with growing interests with Russia and China in recent years, especially in the economic, military, and food security fields.

Although the degree of influence on the units varied naturally, this equation ultimately provided an opportunity for some regional powers to maximize gains, protect vital interests, and maintain regional stability and peace. These factors constitute the fundamental drivers of the movements of the regional middle powers, as previously explained.

But in general, this situation allowed a margin of maneuver that allows the search for spaces of movement between international powers competing for influence outside the constraints of rigid unilateralism that characterized the international system. Which contributes to maximizing gains and in some cases protecting the minimum vital strategic interests and security stability requirements, but without having to abandon one party at the expense of another.

2- Maximizing strategic interests (building bridges).

In light of rising inflation rates and slowing growth rates at a time when the global economy has not yet started to recover from the covid-19 pandemic shock, the impact of the Russian-Ukrainian war in this axis and the multi-front conflicts that resulted between the West, the United States, Russia, and China appear fundamentally on economic issues, particularly on food chains and energy supplies^{xi}.

As a result, the world's economic system is in a state of actual war since it is the only way to challenge unipolarity's supremacy. To put it another way, because the middle powers are the ones that suffer the most directly from the global economic war's competitive challenges, which have led to new kinds of economic alliances. Due to the open economic system's structure, they provide an unconventional source of influence in regional coalitions that cross the Arab regional system.

The positions of the Arab oil-producing nations in OPEC Plus at a time when the West imposed international sanctions on Russian oil reflected a position that is independent of the West and expresses and protects their economic interests in exchange for American pressures aimed at increasing the production of oil barrels, which results in lower prices for producers, including Russia. As a result, European countries tended to enter into partnerships and agreements with the Gulf.

As the percentage of Egyptian gas exports rose over the war first year^{xii} and gas imports from Algeria expanded as one of the alternatives to Russian gas^{xiii}, the strategic economic interests in the area also included gas supply. The markets for energy and food (grains) were used as an arena for direct confrontation and economic experimentation aimed at the regional powers. The nature of other economic criteria varies depending on how each case's economy is unique.

3- Ensuring regional security and stability (achieving stability).

The countries of the region expressed their opposition to attempts to use the region as a battlefield for proxy wars or settling results between rival powers, as well as

their desire to avoid getting caught up in international polarization. Adopting a neutral and unified stance on the conflict and upholding it was a way to accomplish this goal. It also helped to ensure that countries maintain their national security and that the conflict does not escalate as a direct implication of the international globalization between the east and the west.

Attempts were made to strengthen intra-Arab ties and coordinate Arab action in 2022 in response to challenges to Arab national security and meddling in the internal affairs of Arab nations^{xiv}.

4- Resolving the crises in the region or at least preventing their aggravation (protecting the principles and norms of international peace and security).

At a time when the Russian-Ukrainian war forged major alliances between the United States and the West and between China and Russia, regional and trans-regional (new regional) alliances were subsequently formed that protected their economic, political and security interests and formed a buffer against the pressures of international alignments, in light of the stability of crisis management patterns. In addition to the emergence of serious and new attempts to resolve the explosive crises in Yemen and Syria, for example during the first year.

Hence, dealing with explosive crises has thus demonstrated that the constraints imposed by crises that break out in geographical areas relatively removed from the regional scene may constitute opportunities that can be seized in various ways to further the national interests of each country, whether related to geopolitical gains, strategic trade-offs, financial returns, or improving public perception on the global context^{xv}.

In conclusion, the actions of the regional powers in the Arab world during the first year of the Russian-Ukrainian war provided indicators, though limited in space and time, that allowed measuring the idea of regional middle powers in a qualitative

and descriptive manner at this point, and coming close to trying to understand the sources of their power, the limits of their role, the degrees of their influence, and what are the capable cards to exert more influence within the current international system in a way that maximizes the benefits that come from doing so, despite its inequities.

It is apparent that during the first year of the conflict, the forces of the regional order relied more on unconventional standards of force as well as unconventional security issues while attempting to uphold a policy of balance and neutrality.

They also showed a growing propensity to use diplomatic force generally, pursue multilateral initiatives, and come up with collective solutions to deal with the rivalry wave. the expanding global dimension, which increased its mobility potential.

It is clear during the first year of the war that the powers of the regional order relied more on non-traditional standards of force as well as on non-traditional security issues while facing the challenge of maintaining a policy of balance and neutrality, and their increasing tendency to employ diplomatic force in general, pursue multilateral initiatives, and adopt collective solutions to confront the wave of competition. The increasing international scope, which gave it wider scope for movement.

Although the forces in the region took political decisions that were similar in general to a neutral orientation, and were keen to adhere to it, and the behavior of these units was characterized by a kind of independence that allowed them to maximize their influence, or not even be drawn into polarization equations, at the very least, during the first year of the war.

Thus these regional middle powers did not form a clear network of alliances among themselves that would allow talking about a system of intermediate regional

powers, despite its success in achieving its fundamental goals at the national or regional level, as previously mentioned, which constitutes a regional opportunity and a challenge at the same time, that does not mean a state of clear stagnation or complete fluidity.

Here, the debate raises a questions that may be the subject of future research.

Is the continuation of these similar patterns capable of achieving the effectiveness of the regional middle powers in the Arab regional system and further maximizing their role and exercising influence at the points where their interests intersect with those of the dominant and major powers in the international system, or might their effectiveness increase further under certain coordination frameworks that allow By bringing about more significant long-term change Will these trends and frameworks result in a geopolitical environment that expands or strengthens the regional system?

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Decent Life Initiative in Egypt and Sustainable Development

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Abstract:

In 2019, the Egyptian government launched the ‘Decent Life’ Initiative with the aim of providing “a decent life for the most vulnerable groups nationwide and contribute to enhancing the quality of daily public services provided to citizens, with an eye to inhabitants of rural areas” (Presidency Office, 2019). With the increasing international, regional and national emphasis on sustainable development and its associated three pillars ‘economic growth, social equity and environmental protection’, this study aims to answer the following question: To what extent the three pillars of sustainable development, particularly, the environmental pillar, is well integrated into the Egyptian initiative “Decent life”.

To answer the research question, the study utilizes the post-Keynesian theory and employs primary sources, including 5 semi-structured interviews with government officials and other interviews with the initiative’s beneficiaries as well as reports whether on the initiative or the socio-economic and environmental conditions in Egypt. The post-Keynesian theory advocates a kind of growth that brings about a better distribution of wealth, and a renovated principle of effective demand. At the heart of the post Keynesian vision of sustainable development is the connection between the social and ecological dimensions of sustainable development, which requires institutional change to ensure greater fairness and environmental protection that ensures justice for current and future generations. Furthermore, the post-Keynesian theory emphasizes on government investment in housing and infrastructure as the primary source of sustainable competitive advantage for

all three pillars of sustainable development: economic growth, a healthy environment, and a developed society. The purpose of this investment approach is also to create incentives, and voluntary compliance toward environmentally and economically relevant goals through the dynamic dissemination of new technological systems, which promotes innovations for a sustainable society, economy, and environment. This study argues that though the government initiatives have accrued some positive gains on the social, levels, very little attention - if any- was given to the environmental aspect of Decent Life' Initiative.

1. Introduction

In 2019, the Egyptian government launched the 'Decent Life' Initiative with the aim of providing "a decent life for the most vulnerable groups nationwide and contribute to enhancing the quality of daily public services provided to citizens, with an eye to inhabitants of rural areas" (Presidency Office, 2019). With the increasing international, regional and national emphasis on sustainable development and its associated three pillars 'economic growth, social equity and environmental protection', this study aims to answer the following question: To what extent the three pillars of sustainable development, particularly, the environmental pillar, is well integrated into the Egyptian initiative "Decent life".

To answer the research question, the study utilizes the post-Keynesian theory and employs primary sources, including three semi-structured interviews with government officials as well as reports whether on the initiative or the socio-economic and environmental conditions in Egypt. The post-Keynesian theory advocates a kind of growth that brings about a better distribution of wealth, and a renovated principle of effective demand. At the heart of the post Keynesian vision of sustainable development is the connection between the social and ecological dimensions of sustainable development, which requires institutional change to ensure greater fairness and environmental protection that ensures justice for

current and future generations. Furthermore, the post-Keynesian theory emphasizes on government investment in housing and infrastructure as the primary source of sustainable competitive advantage for all three pillars of sustainable development: economic growth, a healthy environment, and a developed society. The purpose of this investment approach is also to create incentives, and voluntary compliance toward environmentally and economically relevant goals through the dynamic dissemination of new technological systems, which promotes innovations for a sustainable society, economy, and environment. This study argues that though the government initiatives have accrued some positive gains on the social, levels, very little attention - if any- was given to the environmental aspect of Decent Life' Initiative.

2. The Decent Life' Initiative

On January 2, 2019, President Abdel Fattah El-Sisi launched the Decent Life initiative with an aim to improve the standard of living for vulnerable societal groups by reducing unemployment and poverty rates, as well as boosting citizens' basic quality of life at the state level. It also contributes to raising the level of daily services provided to the neediest citizens representing 58% of Egypt's population, especially in the Egyptian countryside. There are Nine Goals addressed by The Decent Life initiative, including: 1. Reducing the burden of citizens that are most vulnerable in the countryside and slums in urban areas; 2. Achieving comprehensive development of the neediest rural communities to eradicate multidimensional poverty to provide a decent and sustainable life for citizens at the state level; 3. Upgrading the social, economic, and environmental levels of the targeted families; 4. Providing job opportunities to improve the standard of living for their families and local communities; 5. Making a positive difference in the standards of living for the local community; 6. Promoting civil society organizations and building confidence in all state institutions; 7. Investing in the development of Egyptian citizens; 8. Bridging the development gaps between centers, villages, and

their dependencies, and 9. Reviving the values of shared responsibility among all partner agencies to unify development interventions in centers, villages, and their dependencies (Hayah Karima, 2019).

The Initiative's work areas are divided into seven areas: Housing, health, education, enhancing economy, social interventions and environment. It starts with providing decent housing through raising the efficiency of houses, building roofs, building residential complexes in the villages most in need, and extending water, sewage, gas, and electricity connections inside homes, Infrastructure: by enhancing the micro-projects and activate the role of productive cooperatives in villages. It also involves providing medical services and building hospitals and health units through equipping them with necessary equipment, and operating them with medical staff and Launching medical convoys and providing them with health services such as prosthetic devices (earphones, glasses, wheelchairs, crutches, etc.). In addition, it involves building and raising the efficiency of schools and nurseries, equipping them, providing educational staff, and setting up literacy classes. On the other hand, the initiative enhances economy by training and supporting medium, small, and micro projects. It also provides a set of social interventions including targeting marginalized and poor families, children, women, and the elderly, providing and distributing subsidized food baskets, and establishing nurseries. Lastly, the environmental interventions include providing sustainable sources of energy, energy preservation, lining canals, improving water management, supplying clean water, using modern irrigation methods, enhancing the preservation of biodiversity, protecting natural resources, enhancing waste management and recycling and increasing the number of green areas (Hayah Karima, 2019).

3. The Post-Keynesian Theory

The post-Keynesian theoretical framework represents an unconventional approach to economic thought that places significant emphasis on comprehending

the interrelationships between environmental, social, and economic factors within the context of sustainable development. The post-Keynesian theory asserts that governmental intervention is frequently required to facilitate the process of sustainable development. In line with the post-Keynesian theory, it is asserted that a methodical and intentional approach to “designing rationality” is required to establish a program that enables a balanced and harmonious relationship between economic growth and environmental preservation. It highlights the significance of a comprehensive and long-term outlook in making decisions because it has a wider perspective that includes the ecological system and further the economic and social aspects. There are main four features for Post-Keynesian Theory, which can be summarized as follows:

3.1 The Role of the Government

The government should be involved and contributed in the economy and social policies by increasing its spending and investments in developing infrastructure projects and public goods to attract larger investments, lower the unemployment rate, and achieve economic growth. Post-Keynesians emphasize the value and significance of public goods such as educational opportunities, infrastructure, and health and medical services for long-term economic development and the well-being of society (Ahiakpor, 2001). Additionally, public investment in these sectors should be prioritized since it can have notable positive effects. In addition, government intervention in the economy through expenditures and investments through programs or initiatives helps to implement the competitive market economy concept, providing real competition in the market as no one customer or supplier holds authority over the market, consequently, preventing monopolies in the market. Thus, a multi-supplier market enhances the quality and price of goods, which contributes to increasing the state's exports. However, increasing investments can potentially harm the environment in the future, but it depends on the type of investment adopted (Ahiakpor, 2001).

3.2 The Role of Distribution

The Post-Keynesians focus on the role of distribution, such as the distribution of income and resources, and its impact on economic outcomes. It claims that inconsistent income, wealth, and resource distribution might lead to inadequate aggregate demand since lower-income people prefer to consume more (Ahiakpor, 2001). The post-Keynesian theory highlights the distributional implications of both social and environmental policies, arguing that policies and actions promoting sustainable development should address the interests of marginalized and underprivileged communities to make social well-being and improve the standard of living. Furthermore, the concept of effective demand contends that demand is critical for either current or future generations, which is consistent with the notion of sustainable development, and this illustrates the relative importance of environmental issues. It also argues that environmental measures should be intended to reduce negative distributional impacts, such as loss of employment in polluting industries (Ahiakpor, 2001).

3.3 The Multiplier Effect

The post-Keynesians argue the multiplier effect is the investment multiplier, shown by the rise in total income as an increase in the total investment that would have positive implications on the state's economy. Post-Keynesian theory underlines the Keynesian multiplier effect, which argues that increasing government expenditure can have a positive amplified influence on aggregate demand, resulting in an increase in production and employment. Additionally, the theory argues that the concept of aggregate demand is an important predictor of economic outcomes such as production and employment. It contends that even in the existence of production capability with a weak aggregate demand can result in a higher unemployment rate and inefficient use of resources (Ahiakpor, 2001).

3.4 Emphasizing Ecological Sustainability

The Post-Keynesian theory addresses ecological sustainability within the framework of economic growth (Courvisanos, 2005). The post-Keynesians are deeply aware of environmental challenges, and while they have not made significant contributions in this field, the features that they have proposed correspond with sustainable development evaluations and are opposed to the neo-classical approach, which emphasizes solidarity between generations along with the unbridgeable nature of the environmental constraints, leading the post-Keynesians to oppose the idea of substitutability of the factors of production and emphasize to make a type of harmony that fits perfectly into the concept of sensible natural resource management (Berr, 2015). The post-Keynesians are arguing that all acts performed in the present have consequences for the future, not just for individuals but also for the environment. The post-Keynesian theory argues for rapid economic growth, but this can have a negative impact on the environment owing to resource waste and intense industry that causes pollution. While technology has a high probability of lowering employment, but the usage of technology attracts investments. The post-Keynesian theory here is not to oppose technological usage but to convert it into a tool that helps meet critical human needs while also protecting the environment without affecting the employment rate (Berr, 2015). At the same time. Post-Keynesians demonstrate the necessity for a specific type of planning in their approach to the environment, which includes seeking to use technological progress and decrease the consumption of resources to preserve the needs of future generations, which may be achieved via planning and programs implemented and supervised by states to ensure their optimization. Additionally, the post-Keynesian vision of sustainable development contributes to making ecological development a more operational and effective ideology. Without a doubt, the Post Keynesian School demonstrated the presence of interrelation and harmony with the three pillars of sustainable development, particularly ecological economics (Berr, 2015).

4. Research Methods

The research methodology of this study will be based on qualitative methods, and it will use primary and secondary sources in conducting research, such as official data, reports, and papers. The research is based on a single case study which is Egypt, where primary data is collected from government official documents, such as the “Decent Life” initiative, reports and vision to understand the extent the Decent Life initiative includes environmental sustainability with economic and social sustainability. Furthermore, the study relies on primary data driven from three semi-structured in-depth interviews conducted with the Senior Program and Coordinator Officer at the Ministry of International Cooperation, an Economic Researcher at the Ministry of International Cooperation, the Adviser of the Minister of Finance of Egypt in order to analyze their perspectives and thoughts on how the Decent Life initiative contribute in the socio economic and environmental pillars together and to examine how far the efficiency of each pillar of SD in Decent life initiative from the expert's perspective.

5. A Post-Keynesian Analysis of the Decent Life Initiative

5.1 A Post-Keynesian Analysis of the Socio-Economic Dimension of the Decent Life Initiative

President Al Sisi stated during his speech at the "Shoulder to Shoulder" ceremony that the first phase of the "Decent Life" initiative cost the state 350 billion Egyptian pounds. In relation to the first phase, it is focusing on the construction of sanitation and drinking water facilities, energy, health, educational, and housing services, bridges and roadways, and canal renovation and lining (Zein, 2023). According to an interview with the Senior Program and Coordinator officer at the Ministry of International Cooperation (MOIC), he indicated that the people who live in the villages will benefit from the Decent Life initiative, and they represent 58%. This represents a quantum leap in the lives of people in the Egyptian villages, which

have suffered from being neglected for a long time (personal communication, 2023).

The Decent Life initiative has introduced its target groups which are Seven Differently Targeted Groups including, firstly children and orphans, who needed help due to their weakness and vulnerability, The second category targeted is the most vulnerable families in rural communities due to the need for these families for help and support. The third category is the women, The Foundation for a Decent Life has clear attention to the women of Egypt, especially in rural villages, especially women who are breadwinners and divorced women (Hayah Karima, 2019). The fourth targeted group is the youth, young people who can work have received their share of the interests and assistance of the presidential initiative "A Decent Life", as the Foundation is keen to provide thousands of job opportunities for Egyptian youth, to reduce the unemployment rate in the country and eliminate it once and for all (Hayah Karima, 2019). the fifth and sixth categories go for the elderly and the People of Determination, the "Decent Life" initiative has taken great care of the elderly and People of Determination throughout the state, as the initiative is working hard to develop their lives in various aspects For example, several service centers for people with special needs were established, in partnership with the Ministry of Health and lastly focusing on the Volunteers, as the initiative includes about 21 thousand volunteers (Hayah Karima, 2019). To ensure the effectiveness and achievement of the "Decent Life" initiative, the target groups must be considered at an individual level or village level. This entails using precise units of measurement that appropriately reflect the requirements and features of the initiative's recipients. While the initiative recognizes that a one-size-fits-all strategy which is unsustainable. Instead, it must stress the necessity of recognizing each group or area has special circumstances and needs and providing customized solutions appropriately.

The first phase of the initiative was based on 4 main development goals in all the villages of the project (improving the level of infrastructure services, building the

Egyptian personality, social interventions, and lastly decent housing, economic development, and employment), according to what was announced at the time of launching the initiative, and they are detailed as follows:

5.1.1. Improving the level of infrastructure services:

The Decent Life initiative was focusing on building a sustainable infrastructure through government investments which are compatible with the first feature of the post-Keynesian theory, which is the role of the government, that emphasizes the importance of government intervention in the economy by putting more investments in infrastructure to provide jobs, improve income, enhance consumer spending, besides that Good transportation minimizes logistics costs, supports trading, and enhances access to markets, which benefits firms and increases competitiveness, resulting in high economic growth. The first phase of the initiative delivers the sanitation service to 17.9 million people which represents about 34 % of the targeted village in the three phases. There is some coverage in 217 villages. This is while there are 1,143 villages that are deprived of sanitation services, in addition to more than 10,000 affiliates to whom non-traditional networks will be extended (Zein, 2023). This requires the establishment of 130 new treatment plants (including 25 triple treatment plants) with a capacity of more than 2 million m³ / day to treat the wastewater for all disadvantaged areas, which requires the implementation of 1361 integrated sanitation projects.

In addition to the sector of drinking water, even though the network's drinking water coverage has reached 100%, there is an issue with water sustainability, since the "shift" technique is frequently used in the countryside. However, the project aims to fully sustain water, which necessitates the construction of 51 drinking water purification plants with a capacity of 1 million m³ / day, as well as increasing the efficiency of several existing small stations with 421 projects, as well as replacing and renewing 3 thousand km of worn-out pipes (Zein, 2023). The programs aim to reach 4 million families. Additionally, the Decent Life initiative had stressed

supplying and entering Natural gas to 90 villages, with a total number of units converted to use natural gas instead of butane gas cylinders, amounting to 300,000 housing units Until May 2022. Natural gas networks are currently being extended in 194 other villages in the Decent Life initiative, where the networks will be extended successively to the rest of the villages once the sanitation services extension works are completed. As for communications and post offices, for the first time, high-speed internet service will be introduced to the Egyptian countryside, as well as improving the coverage of mobile networks within villages, and adjusting and developing Egyptian post offices to match population numbers. Although the electricity coverage is 100%, for this purpose, a comprehensive change is scheduled for all elements of the system, such as modifying about 4.5 million meters to the prepaid meter category and 1.1 thousand electric panels, and other sub-projects (Zein, 2023). This shows the application of the second feature of the post-Keynesian theory which is the role of distribution that emphasizes the significance of equal distribution of resources by the government to improve individuals' well-being and ensure an equal supply of public goods through government investments in sanitation, clean water, natural gas, electricity, and infrastructure development to reduce the poverty rate and improve the well-being, all of which are consistent with the theory's second precept.

As for infrastructure, the roads, bridges, and all the streets in the targeted village have been paved and fixed in proportion to the rural environment, with a total length of 14.5 thousand km, with 2047 roads. It is scheduled to construct 617 bridge projects, divided into (470 car bridges and 147 pedestrian bridges), in addition to the implementation of 2,700 km of roads to connect villages and centers. This is in addition to updating more than 80 crossings to contribute to the ease of transportation for citizens (Zein, 2023). In the interview with the Senior Program and Coordinator officer at the Ministry of International Cooperation (MOIC), he emphasized the important role of the initiative in the construction and development of roads and bridges in villages to enhance mobility and better access to urban

areas and basic services to enhance safe and comfortable passage to the people alongside, enhancing the internal trade and business to achieve the economic development (personal communication, 2023).

In addition, the implementation of sanitation services and cleaning water projects in the Decent Life initiative is critical due to its contribution to the achievement of Sustainable Development Goal 6 (SDG 6) and its goals, which focus on guaranteeing access to safe drinking water and sanitation, in addition to the development the infrastructure enhance Decent work and economic growth which is Sustainable Development Goal (SDG8).

5.1.2 Enhancing the Capabilities of the Egyptian People:

The second goal is building the Egyptian human through improvements in educational, health services, and youth sectors. The Decent Life Initiative incorporates Sustainable Development Goal 3 (SDG 3) and Sustainable Development Goal 4 (SDG 4) into its comprehensive efforts by developing the educational and health sector. One of its primary goals is to focus on developing and building the Egyptian human by means of developments of the sectors of education, health care, and youth development.

In terms of the educational structure, it is planned to build more than 14,000 new classrooms during the first phase, in addition to maintaining and enhancing the effectiveness of 25% of the current schools, with more than 1,250 existing school buildings, to provide basic education services and work to address the issues with rising rates of densities within the classrooms (Zein, 2023). Furthermore, the plurality of school periods, in addition to striving to serve places lacking educational resources, and to raise the rate of accommodating kindergartens, by constructing more nurseries and offering them for children under the age of four or five. Additionally, In the field of health, the decent life initiative will provide support to the supply of infrastructure and construction in all the towns and villages targeted in the initiative's first phase with the goal of accelerating the implementation of the full health insurance system by boosting the effectiveness of all health facilities in

Egypt's rural areas, as 24 hospitals are expected to be established throughout the first phase. For the first time, a new central hospital includes about 1,374 clinics and units in addition to the opening of a new ambulance point, a treatment convoy of 1,000 convoys, and the installation of 40 mobile CT scan convoys outfitted with the most recent advancements in this field from around the world.

These projects were built in the health sector in an effort to meet the requirements of providing integrated health services to citizens of these targeted villages. In an interview with a Senior Economic Researcher at (MOIC), he highlighted that the Decent Life initiative worked to reduce the burden on rural women, he illustrates an example such as it allocated early detection units for infertility, moreover, early detection was carried out periodically on children under 5 years, to conduct comprehensive examinations in the targeted villages by implementing early interventions in aspects related to communication and the nervous systems and also he said that the initiative focused on improving and developing the medical infrastructure such as getting modern medical devices alongside constructed a number of medical units and hospitals in targeted villages (personal communication, 2023). The second goal of the Decent Life Initiative is to build up and develop Egyptian capabilities which correspond to the first feature of a post-Keynesian theory which is the role of the government in implementing medical and educational projects is an influential role in improving people's lives by assuring accessibility to good educational and medical services. This approach corresponds with the theory's reliance on the government's role in making investments in public goods and improving people's lives. The implementation of the second feature of the post-Keynesian theory which is the Role of Distribution showed in the government's efforts to ensure equal distribution through the initiative to better the lives of individuals across different areas by distributing its resources and investments in the shape of basic services such as education and health sectors to achieve social welfare. In the sector of youth and sports, it is scheduled to build and refurbish around 1,000 youth centers, 271 of which will be new, in order to

provide care for children and youth in Egyptian communities (Zein, 2023). The third feature of the post-Keynesian theory is the Multiplier Effect, which aims to increase government projects and private investment to provide job opportunities to enhance the employment rate. The multiplier effect happens when the government increases its spending and investments to boost economic growth. The initiative's focus is on improving the growth of infrastructure and construction investments, such as the building of hospitals, schools, and youth centers, thus providing hundreds of job opportunities. Subsequently, effects positively the standard of living, employment rate, and well-being.

5.1.3 Social Interventions and Decent Housing

The third goal is government societal interventions to reduce the poverty rate and enhance social wellbeing. The Decent Life effort includes several key sub-initiatives that are carried out to improve the variety of services available in a decent life. The Foundation for a Decent Life launched initiatives that helped millions of the poorest and most vulnerable citizens, including the "Linking Goodness" (Wasl Al Kheir) initiative, from which the number of beneficiaries reached 1.5 million, and the "Back to Education" (Ragèin Netalem) initiative, from which the number of beneficiaries amounted to 40,000 male and female students, as well as the "Education is Life" (El Talèim Hayah) initiative 24,000 have benefited from it, and the "You are life" (Enta Al Hayah) initiative - which is a comprehensive social, health, cultural and environmental awareness convoy - from which 52,000 citizens have benefited, and the "Joy Lasts" (Ydooom Al Farh) project, which focused on family counseling for those about to marry as well as preparing females about to marry about 800 girls benefited from the project. In terms of education, 834 schools were constructed, in addition to the growth of 1519 schools, and a good living did not overlook the great number of illiterates in the countryside, so 74091 persons were educated (El Sharkawy, 2023).

The Ministry of Planning and Economic Development examined the results of eight years of raising the standard of life for Egyptian citizens between July 2014 and June 2022 in a study that was published. The number of financial resources and significant governmental expenditures that the state made over the last eight years to broaden social security services and social safety nets, enhance drinking water and sanitation facilities, advance poverty development, and foster transportation are clear indications that this goal was the primary focus (Ministry of Planning and Economic Development, 2022). The government intervention to make social protection and provide decent houses for vulnerable communities through the initiative of a decent life targeted Sustainable Development Goal 11 (SDG11) which aims to renew and build sustainable cities and villages that are livable, achieved through the initiative's works (United Nations, 2023).

The Decent Life initiative aims to offer a social protection umbrella and make them a key partner in rural development within the framework of the Egyptian National Rural Development Project. The "decent housing" initiative is at the top of this list of social interventions. The first phase targeted 377 villages that were most in need and most susceptible to violent extremism and ideological terrorism, with a total of 756 thousand households, or 3 million people. A person from one of the eleven governorates (Mohamed, 2023). Projects were implemented during the first phase at a cost of around 5.4 billion pounds, benefiting 4.5 million residents in 342 localities. Among these initiatives are efforts to improve efficiency and the construction of 16,000 dwellings to serve as "Decent Housing". The plan seeks to construct 350,000 houses for farmers. In addition to 163 pavement projects and 216 environmental, security, and firefighting projects. the first feature of the post-Keynesian theory which is the Role of Government in the Economy is shown by the government's strong intervention in the development of rural areas, subsidizing housing projects, and delivering a social safety umbrella. In addition to the second feature of the post-Keynesian theory which is the role of the distribution feature is shown in measures to disperse resources equally through upgrading and building

new housing and other infrastructure services in underprivileged regions which reflects the efforts of the government in ensuring equal and fair distribution. in addition to interventions in the construction of decent housing or home renovation. The list was compiled as part of the "decent Housing" effort, which aims to improve house efficiency, construct roofs, and construct housing complexes in the most impoverished areas.

Regarding social interventions for people of determination, it is planned to establish 20 new service centers for people with special needs, in partnership with the Ministry of Health and Population, to provide the various services required for them (Mohamed, 2023). The third feature of the post-Keynesian theory which is the Multiplier Effect is seen in government spending on constructing new housing and service centers, which stimulate economic growth and create temporary and permanent job opportunities alongside it improves the private sector by allocating the projects attending to the numerous requirements of vulnerable groups, notably persons with impairments. According to an interview with the Senior Program and Coordinator officer at the Ministry of International Cooperation (MOIC) emphasized that The Egyptian government promotes economic development and welfare programs through the Decent Life initiative of many villages and cities that have been marginalized for decades, through building decent houses and basic infrastructure services such as providing electricity, potable water, and sewage networks, and improving and developing services to provide a decent life for the Egyptian people (personal communication, 2023).

5.1.4 Job opportunities and employment:

The Decent Life initiative focuses on improving economic growth and opportunities for increasing the employment rate, which is aligned with SDGs 1, 8, and 10. The plan of initiative intends to accomplish the growth process and avoid migration to cities or outside of Egypt by generating work opportunities in rural areas to achieve overall economic development. Based on an interview with the Adviser of the Minister of Finance of Egypt, he highlighted that the Decent Life initiative enhanced

the Employment proportion within the temporary job opportunities created during the implementation of the initiative's projects, and permanent job opportunities after the operation of new projects in the initiative (personal communication, 2023). There are several efforts, including vocational training programs and support and finance for small and micro-projects, are being undertaken to create long-term and permanent job prospects for all Egyptians (United Nations, 2023).

All aspects of development performed in Egypt's countryside must be complemented by the creation of job opportunities in the villages. Due to a lack of work prospects, growth is incomplete, resulting in continued migration to cities or beyond Egypt. The goal of this massive initiative is to provide long-term work and temporary throughout the development process, as well as the execution of several vocational training programs for young men and women in these areas. Multiple measures are being done in terms of permanent employment, whether through the Small and Medium Enterprises Development Agency or others (Egypt Projects Maps, 2021). As part of the initiative's first phase, small and microprojects in the villages are expected to receive funding totaling 1.4 billion pounds. These projects will be funded by Egyptian banks as well as the local development, planning, and economic development ministries, and will be designed to create jobs for women and young people. If managed by the private sector, it is also intended to establish 333 small craft complexes on an acre of land in each village's local unit, with workshops and exhibitions centered on the crafts and opportunities specific to each community. Furthermore, by 2021, the decent living program has created 123,000 job possibilities within the first phase of the "a decent life" harvest (Zein, 2023). However, the figure may now be increased to reach 250,000 employment openings. The third feature of the post-Keynesian theory which is the Multiplier Effect feature is seen through the government's investments in infrastructure, education, vocational training programs, health, and funding of small and medium enterprise projects to encourage the growth of the economy and creating job prospects to produce more and to increase the income which makes the GDP

increase rapidly which makes economic stability. The first feature of the post-Keynesian theory which is the Role of Government in the Economy is seen in the initiative's focus on generating employment opportunities and encouraging economic growth in targeted rural regions and governates through financing a number of small and medium enterprises and training, thus demonstrating the government's role feature of the theory in the economy. The approach attempts to foster equitable development and prevent migration to cities by addressing a shortage of job opportunities.

Additionally, the operation of 20 family development centers to raise family awareness, besides, the provision and availability of family planning services and means, as well as the mechanization and linking of their databases. This, in addition to giving different training programs to educate them on fundamental trades and train them on new technologies in light of the world's present digital transition and what the pandemic enforced, has already been offered. This sector's phases must be hastened. When it comes to financial inclusion. The rapid implementation of the project demonstrates the government's attempts to fill the development gap between urban and rural areas and achieve sustainable development (Zein, 2023). The United Nations has listed the "Decent Life" initiative in the registry of organizations for Partnerships for Achieving Sustainable Development Goals for Example: eradicating poverty and hunger, achieving a good education, good health, and well-being, providing decent work, and economic growth in rural areas (Zein, 2023). The second feature of the post-Keynesian theory which is the Role of distribution is shown in the initiative's holistic approach to improving the standard of living reflects the role of distribution, guaranteeing a fair allocation of resources to improve housing quality services and financing projects in the underprivileged regions to reduce the harmful consequences of economic inequality and achieve social justice and maintaining social cohesion.

5.2 Post-Keynesian Analysis of the Environmental Dimension of the Decent Life Initiative

The Decent Life Initiative includes an environmental aspect, which encouraged the creation of an environmental department in the Decent Life Foundation. The first feature of the post-Keynesian theory which is the government's role appears in the founding of the Decent Life Foundation's environmental department, emphasizing the government is seeking to handle and mitigate ecological issues. The environment department has held several awareness workshops at the governorate level of "A Decent Life" with the goal of developing environmental awareness in the Decent Life villages and attempting to change village behavior to be more environmentally friendly. The environment department also helped educate farmers about the transition to modern irrigation, which helps to achieve effective water usage, which is a vital aspect of water conservation. The first feature of the post-Keynesian theory which is the government's role seen in emphasizing the government's engagement in the cooperation established by the Decent Life Foundation and the Ministry of Environment illustrates the willingness of the government to integrate environmental and climate factors into The Decent Life initiative.

Thus the commitment of the Decent Life Initiative in the environmental field, especially since the Foundation's main goal is to protect the most vulnerable families, farmers, youth, women, and all target groups within the "Decent Life" villages, and this can only be accomplished through an environment that fulfills all the requirements, whether healthy or Those related to facing climate changes and working to provide an ideal environment for them (Amer, 2022). There is also a collaboration between the Foundation for a Decent Life and the Ministry of Environment to include environmental and climatic criteria in the Foundation's work in the first stage the communities that are intended to be turned into ecologically friendly villages, such as Fares, are 175 villages, which are the villages that require

rapid environmental intervention, and not this total number, because “Decent Life” works in more than 4 thousand villages (Amer, 2022).

5.2.1 Modern and eco-friendly irrigation systems

The initiative's projects include modern irrigation and drainage systems, canal lining, creating and growing drinking water purification facilities, covering drains, triple sewage treatment, waste recycling, and extending organic agriculture. According to an interview with a Senior Economic Researcher at the Ministry of International Cooperation (MOIC), he explained that the Decent Life Initiative contributed to protecting the environment by improving the process of managing and distributing water, ensuring easy access to irrigation water to agricultural lands, solving problems of water delivery at the ends of canals, increasing agricultural productivity, and overcoming health and environmental problems, as the Egyptian governorates witnessed under the umbrella of Decent Life Initiative the largest process of developing and lining canals in Egypt history which is a major axis of developing the Egyptian countryside and improving the standard of living for citizens (personal communication, 2023). The initiative's effort also involves supplying communities with fiber optic networks to give fast internet access, constructing communication towers, and executing digital transformation under the new government complexes system (State Information Center, 2022). In the interview with the Adviser of the Minister of Finance of Egypt, he emphasized that the Decent Life initiative has focused on environmental aspects, and he provided examples such as the Lining of canals and reducing pollution rates in irrigation water (personal communication, 2023). In addition, the Decent Life Initiative is concerned with numerous initiatives, such as raising road efficiency and lining canals, and it may appear that they are unrelated to the environment, however, this is not the fact. Improving highways, for example, would result in clean, ecologically friendly roadways, and sanitation projects would conserve the environment while simultaneously protecting humanity from damage caused by sewage problems. As a result, the Decent Life Initiative is regarded as one of the most important projects

in the field of climate change adaptation and mitigation. In addition to its other goals, it is an ecologically responsible endeavor. Based on an interview with a Senior Economic Researcher at (MOIC) explained that The Decent Life Initiative has held many awareness seminars and workshops for the following objectives: Raising environmental awareness in villages, Attempting to modify the behavior of individuals in villages to be environmentally friendly behavior, in addition to Urging farmers to switch to modern irrigation, helping achieve optimal use of water (personal communication, 2023).

5.2.2 Natural Gas and Biogas

As part of the Decent Life initiative, the petroleum sector planned the execution of natural gas supply operations to more than 50 centers and 1,436 villages as a first stage, benefiting around 4.1 million homes (Ratb & Saeed, 2022). The fourth feature of the post-Keynesian theory is ecological sustainability focused on enhancing investment in renewable energy, eco-friendly energy, and clean technology, as part of the move to a more sustainable economy. In the interview conducted with the Adviser of the Minister of Finance of Egypt, he mentioned that entering natural gas into rural homes not only represents the social pillar but also an important development as an alternative to other pollutant types of energy as eco-friendly fossil fuel (personal communication, 2023). The Decent Life initiative generated a plan to spread biogas technology in the initiative's villages, which is regarded as one of the simplified models for the concept of the sustainable economy, as the household biogas unit provides biogas equivalent to two butane gas tubes per month, as well as liquid organic fertilizer sufficient to fertilize three acres all year. Biogas technology is an Egyptian success story in dealing with agricultural waste and animal dung by training youths to establish businesses that operate these units in rural areas, producing biofuels and organic fertilizers in a way that accomplishes development's environmental, economic, and social goals. After the first phase is completed, the building of 65 biogas units in Gharbia

Governorate and 20 biogas units in Fayoum Governorate will be completed and others in different targeted villages (El Basyouni, Suleiman, & Hassan, 2022).

5.2.3 Building Sustainable Agriculture in Rural Areas

The second feature of the post-Keynesian theory is the role of distribution tackled through the initiative's emphasis on protecting and developing marginalized households, farmers, youth, and women within the initiative's works to ensure a good living for all target groups by distributing resources and opportunities equally through services center and policies that support labor rights which seen here as farmers. As of the oldest geographical aspects in human past times, the Egyptian rural requires ongoing developmental initiatives and approaches due to its constant geographical allocation (Eisa, 202). In terms of agriculture, it is proposed to employ modern irrigation to regulate and develop 3.7 million acres of ancient lands, boost agricultural production from 10% to 20%, and make all agricultural services available to farmers in one convenient location. It is planned to build 332 agricultural complexes as well as enhance the system of dairy collecting centers. Its goal is to build government complexes that house all government services supplied by government departments, and a considerable number of concrete structures (many stories) have already been constructed (Zein, 2023). The third feature of the post-Keynesian theory is the multiplier effect which could be seen in the initiative's numerous efforts of initiative, which include sophisticated irrigation and drainage systems, water purification services, and organic agriculture. These measures not only have immediate environmental benefits, but they also create a multiplier effect by stimulating economic activity and generating job opportunities for employment. The "Decent Life Initiative" works to improve living conditions as well as services for people, particularly in rural regions. The decent life initiative seeks to raise farms' living standards to grow Egypt's rural. According to the Minister of Agriculture and Land Reclamation, there are 332 agricultural service complexes scattered throughout 20 governorates and 22 centers, with services covering 1413 communities. Furthermore, 262 water stations were installed, 132

groundwater wells were sunk, and 83,000 acres were irrigated using modern irrigation technologies (El Basyouni, Suleiman, & Hassan, 2022). In the interview with the Adviser of the Minister of Finance of Egypt, he emphasized that decent life doesn't miss the agricultural sector and he provide examples such as constructing logistical markets combined between numbers of villages, especially in professions related to agricultural manufacturing such as packing, cooling, packaging, and others to raise standards of living and stimulate the economy (personal communication, 2023).

5.2.4 An Example of Environmental Initiatives under the Decent Life Initiative: Fares Villages in Aswan

The Decent Life initiative implies the planting of over 100,000 trees in various communities around Egypt to fight against climate change, lower air temperature and purify it, reduce wind speed, and boost urban biodiversity. The fourth feature of the post-Keynesian theory is ecological sustainability stressed social-ecological responsibility through increasing the green lands, and the recycling process to preserve the environment. In addition, the initiative also includes workshops for producing various goods from palm trash. To teach women how to recycle palm debris and to work to cleanse the Nile water of any environmentally damaging garbage. It is worth mentioning that the "Decent Life" initiative's programs are wide and multidimensional, encompassing renewable energy, green design, and environmental sustainability. Furthermore, the decent life is increasing solar power generating projects, implementing green construction standards, solar lighting for government buildings, biogas units, solar street lighting, and energy-saving technologies (State Information Center, 2022). The Foundation for a Decent Life, the Ministry of Planning, and the business sector collaborated to transform Fares Village in Aswan into an ecologically friendly community. The environmental sector held seminars on recycling palm trash into environmentally friendly items and transforming the community into an ecologically friendly hamlet that encourages tourism, as visitors did not visit the region previously. Because the

village has no tourist attractions and has a distinct culture from the rest of Aswan, we held workshops and a tourist delegation visited, and the boats began operating, environmental awareness workshops were organized, and work was conducted on the problem of waste and water purification in the Nile Aswan University participated in the planting of 1,000 trees in the village of Fares in cooperation with the Decent Life Foundation. Furthermore, a variety of seminars and workshops were held to educate villagers about how to deal with environmental problems and establish green sustainability in their communities (State Information Center, 2022).

In this regard, the "Green Village" program was inaugurated at the Climate Change Conference "COP 27" in the "Decent Life" communities. The village of "Faris" in Aswan Governorate has been selected as the first green village in the Republic of Egypt with the goal of preparing the villages of the initiative to meet international environmental standards, and it is expected to move to the rest of the villages of the initiative during the coming period. This massive project is the most demanding of all the significant projects executed in the initiative during the last years. It is planned to continue executing on a scale of 4,500 villages, each with its unique set of conditions and environment. The projected workload was not as easy as the government agencies could do on their own (Zein, 2023).

6. Conclusion

Unlike the socio-economic aspects of the Decent Life initiative, the environmental pillar of Initiative corresponds with the features of post-Keynesian theory by emphasizing the government's responsibility in tackling ecological challenges and incorporating environmental aspects into development activities. Sustainable energy, water management, biodiversity preservation, waste management, and recycling are among the aims of the effort. It utilizes a variety of measures, including governmental implementation, public awareness, the promotion of clean technologies, and the expansion of green spaces. The initiative's attempts to

create environmentally friendly settlements, promote renewable energy, and apply biogas technology indicate its dedication to environmental sustainability. The focus on farming sustainability in the initiative, as well as the multiplier effect and ecological responsibility caused by government interventions and support of rural prosperity, thus can be viewed that the government can promote economic growth with ecological sustainability. Furthermore, the initiative's linkage with the SDGs demonstrates its dedication to social-ecological responsibility. However, the environmental part of the Decent Life Initiative is marked by significant weaknesses and constraints in meeting its stated goals. Despite the importance of modern irrigation systems as a fundamental aim, their use remains limited and small. Green areas are clearly very few according to Egypt area, and recycling actions are severely limited in scope. Furthermore, it shows that natural resource preservation is ineffectual, and the use of nonrenewable energy sources is mostly ignored, with one notable exception of the comparatively eco-friendly usage of gas. Despite the availability of awareness-raising programs, there remains an absence of active civic involvement in environmental issues. Clean technology is extremely absent, and truly innovative environmental technology is scarce. While the Decent Life Initiative has an environmental component, despite some of the implementations of environmental goals but is still very broad and ineffective regarding the initially intended, it has a limited presence, reach, and impact.

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From Top-Down Environmental Policies to Limited Bottom-up Environmental Policies: An Analysis Before and After Adopting the SDGs in Egypt

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Abstract:

In the recent few years, sustainable development and environmental protection became widely visible in the media and on government agenda in Egypt. Yet, Egypt has a history of ineffective environmental regulations (McKenna, 2013, Al-Shaabani, 2018; Eltayb, 2021). While Al-Shaabani criticised the lack of awareness and efficiency among monitoring entities, Eltayb (2021), after reviewing the Egyptian government's expenditures on the environment, finds that the limited funding obstructs the impact of any government activities taken to protect the environment. Thus McKenna noted that Egypt is still in critical need of sustainability. This paper questions whether the Egyptian government managed to create a balance between the needs of businesses in Egypt and the environment. The paper argues that the Egyptian government adopted a top-down participation in its environmental actions that disregarded the private businesses' inclusion in setting the new environmental goals. This has eventually increased the struggle of firms in accepting the government's environmental actions or complying with their environmental obligations. The paper is going to assess the businesses' inclusion and participation in the making and implementation of Egypt's Environmental Sustainability strategy as well as environmental laws and actions. It is going to identify the stages - if any-where the private businesses were included and the degree the Egyptian environmental sustainability strategy was influenced by the participation of such businesses. The importance of this research lies not only in identifying the level of

businesses' inclusion but also in exploring the level of government involvement and control. The findings can, hence, serve in providing lessons for better environmental policies making.

1. Introduction

In the recent few years, sustainable development and environmental protection became widely visible in the media and on government agenda in Egypt. Marking the beginning of a new era, Egypt has launched its sustainability vision for 2030, which promises environmental sustainability in firms. Subsequently, green investment laws were established in 2020. (Ministry of Planning and Economic Development, 2021). Yet, Egypt has a history of ineffective environmental regulations (McKenna, 2013, Al-Shaabani, 2018; Eltayb, 2021). While Al-Shaabani criticised the lack of awareness and efficiency among monitoring entities, Eltayb (2021), after reviewing the Egyptian government's expenditures on the environment, finds that the limited funding obstructs the impact of any government activities taken to protect the environment. Thus, McKenna (2013) noted that Egypt is still in critical need of pursuing environmental sustainability. However, McKenna (2013) suggest that sustainability would remedy the limited success of regular laws; the institutional obstacles that have been encountering the Egyptian government for over thirty years. Nevertheless, the author did not identify how this would work in practice. Instead, he relied on sustainability (in theory) to work automatically on balancing economic firms with the environment with minimalist interventions from the government side.

Hence, this paper aims to understand the dynamics and process of environmental sustainability policies in Egypt. The purpose of this study is to compare between the environmental policy-making before introducing the global Sustainable Development Goals and the type of participation involved, if any. The paper argues that while the Egyptian government followed a top-down participation model in its environmental policies before the adoption of SDGs, it has gradually moved

towards a more, yet still limited, bottom up approach after the adoption of the SDGs. Thus, while old environmental policies disregards the private businesses' inclusion in setting or implementing the environmental goals and eventually increased the struggle of firms in accepting the government's environmental actions or complying with their environmental obligations, most recent environmental policies presents an improvement in this regard. However, this bottom-up participation was limited to the participation of green corporations and it maintained the top-down policies in dealing with Non-green Corporation.

This study assesses businesses' inclusion and participation in the making and implementation of Egypt's Environmental Sustainability strategy as well as environmental laws and actions using primary sources. The primary sources include environmental laws and regulations, data from governmental releases and two semi-structured interviews with a lead officer in the Unit of Sustainable Development at the Ministry of Planning and Economic Development as well as the Senior Advisor of the Minister of Environment, who has over 33 years of experience with the UN organs working on Environment. The content gathered is then analysed and compared in light of the theoretical lenses of bottom-up and top-down participation to fully address the research question and conclude the study.

The importance of this research lies not only in identifying the level of businesses' inclusion but also in exploring the level of government involvement and control. It is going to identify the stages - if any-where the private businesses were included and the degree the Egyptian environmental sustainability strategy was influenced by the participation of such businesses. The findings can, hence, serve in providing lessons for better environmental policies making.

2. Top-down vs. Bottom up Approaches to Policy Making

The essence of the top-down approach lies on the premise of trickle-down. It would begin with governments imposing laws and society executing them. As it was stated

in the last section, the 20th century was characterised by intensive-polluting activity in the northern world. Initially, the top-down development showed relative success. It was expected that the spill-over effect will lead to improvement in the quality of citizens' lives, eventually. All southern countries adopted similar developmental approaches and replicated the experience (Willis, 2010). After a certain time, the deteriorating situation necessitated that a new type of development shall replace this one.

Regarding the participation of other actors, it was not clear if they played a role at all or not. As stated above, there is a huge gap in time between the emergence of top-down development and bottom-up development. Scholars, barely, mentioned "other actors" in the analysis. Collected evidence from the literature on top-down development supports the argument that other actors have an implicit role in executing decisions. However, they play an obedient role (Sabatier, 1986; Crescenzi and Rodríguez-Pose, 2011, p.4). Sabatier referred to a very important point that in top-down participation the government ignores other actors. Sabatier admitted their existence in the process at least during the implementation phase. When he attempted to differentiate the top-down from the bottom-up decision, he recognised the involvement of the actors in the top-down decision as recipients of governmental decisions. (Sabatier, 1986, p.33)

This type of participation dominated the literature review. A group of scholars, representing the first strand, was biased towards using coercive laws to achieve environmental sustainability. This explicitly appeared in their efforts to assess the rigidity of governmental laws. Additionally, other scholars suggested even with the incentives to attract the private sector to respond to it, private corporations responded in an asymmetric pattern that, often, challenged the purpose of the laws. This destined failure was summarised in Pike, Rodríguez-Pose & Tomaney's (2006) idea that the lack of coordination resulted in the low performance of the recipients.

On the other hand, the bottom-up participation gradually replaced the top-down

policy on the international scene. The new approach called for innovative solutions that starts with the local communities. Willis (2010) proposed two possible reasons for that. The first is political, to decentralise power and include other groups in the decision-making process. The second is economic, to allow for more efficiency in implementation (Willis, 2010). Unlike top-down development, this approach prioritised the quality of development over quantity to avoid repeating the mistakes of top-down development. The limited economic view was widened to include the environment, standards of living and others. (Pike, Rodríguez-Pose & Tomaney, 2006, p.24).

In the aftermath of top-down development atrocities in the south, the UN produced Global Governance which means that the UN and its representatives on the international level co-decide on global crises with governments (Willis, 2010). With this system growing in popularity, the UN achieved progress in the international agenda of the SDGs which paid great attention to the participation of societies in choosing the developmental methods, along with governments. The UN conditioned governments to take decisions with the inclusion of all actors.

The developers of bottom-up development related to the core concept of participation. Generally, the rationale for bottom-up participation was to give local communities the power to develop their strategies (Sabatier, 1986, p.16). The author stressed the horizontal and vertical channels through which they communicate and make decisions eventually (Sabatier, 1986). However, the developers radically detached the empowered society from the higher authority. They assumed that the developmental process would start and end with the local society. This intriguing idea is subjected to criticism as it undermines the government's role. At the same time, it contradicts the guiding rules of global governance.

This paper does not question the validity of these arguments. The main concern, however, is to form the big picture of bottom-up participation that engage the private sector in the decision-making process at the early stages of setting the agenda.

That is what it consults the bottom-up approach as represented by the UN. This includes the decentralisation of power and influencing the implementation and accessing information (The United Nations, 2021).

3. The Environmental Policy in Egypt before the Adoption of the SDGs

This section demonstrates the environmental decisions that were issued before integrating environmental suitability policies. The Egyptian government relied on laws and released an environmental plan to regulate the environment. Noting that the sample represented is not inclusive of all environmental regulations. However, it is to elaborate on scholars' conclusions about the Egyptian case that accentuated the low credibility of policy regulations and the lack of commitment among corporations.

To begin with laws, the history of environmental regulations goes back to the year 1962 when the government issued a law that regulate the liquid waste discharged by individuals or legal personalities to protect the waterways from any harm. In 1967, the government banned waste burning (Marai, 2017, p.11). More importantly, the law of the year 1982. This law is specialized in protecting the River Nile from any polluting factors. Although these laws were applied to corporations to guideline the protection of the environment, McKenna (2013) has projected that these extracted laws were contextualized for other purposes of curbing environmental pollution caused by other actors too (including individuals) rather than targeting and treating the symptoms of the environmental deterioration caused by businesses. Consequently, it was hard to judge whether old laws mainstream businesses' role in protecting the environment.

In the year 1994, the government issued a set of laws to protect the environment. It became known as the action plan of environmental protection of 1994. This set of laws is one of the most rigid regulations in the history of environmental protection in Egypt (McKenna, 2013). It incorporates many dimensions of environmental protection. For instance, it requires stakeholders (private sector) to hand in an

evaluation study for the possible environmental impacts of their Project and get licensed before starting the project. For that reason, the government created The Egyptian Environmental Affairs Agency (EEAA). Also, it puts restrictions on the use of pollutants (Ministry of State for Environmental Affairs, 1994). The government also adopted legislation to penalise polluters; whoever violates this environmental code, gets charged and/or faces imprisonment (Ministry of State for Environmental Affairs, 1994, Law no. 4 Articles 79, 84-101). Finally, the Egyptian government established the MoE in 1997 and from thereon integrated the EEAA into it.

Although the debate on environmental regulations was extended to other laws, the aforementioned plan of 1994 remains the main guide of businesses' desirable operating systems by the government. Marai (2017) regards that set of regulations as the first environmental policy in Egypt that is specified in dealing with environmental protection. Despite the amendments that this regulation, specifically, has witnessed, the substance of the penalties has not altered. Consequently, these legislations received heavy criticism from scholars that could be organized as follows.

The first pitfall is the blind laws of 1994 dealing with pollution cases. "The Polluter pays" is one prominent principle in fighting environmental deterioration in Egypt. Yet, its terms are not properly imposed. The charges on the polluters expose that environmental regulations do not distinguish between polluters in terms of their pollution levels in relation to the consequences of their acts. The laws entail that no matter how much pollution, the polluter faces the same destiny. Assessing these penalties, Darwish (2014) found that private corporations tended to pay the charges and maintain the status quo to avoid costs that deduct from their profits. He referred to it as a poor-structured law.

The second pitfall is the format in which all these laws are brought is far from being enforced and on the same distance as voluntary regulations. On the one hand, these laws do not incentivise the corporations to comply. Darwish reveals that the environmental performance of corporations is weak and that corporations are not

committed to executing laws or mitigating their activities' environmental impact because they do not find incentives in doing so (Darwish, 2014). On the other hand, the penalties of these laws are described as weak in structure. In more detail, McKenna (2013) and Darwish (2014) admitted that the policies operating the system of managing the environment are permissive; the institutional restraints and weak implementation work together for failing the system of protecting the environment.

The discussion over these laws constitutes clear evidence of how the government operated on voluntary compliance that was represented in the literature by alternative words of weak and unenforced laws. Some laws did not even address the pollution originating from private corporations' activities specifically. The following section analyzes environmental policymaking that resulted in a low commitment to policies and drove scholars to judge their inadequacy.

3.1 Analysing the Environmental Policy: Participation in the Decision-Making Process?

Regarding inclusion in making decisions (policy formulation), Egypt adopted a top-down approach to making decisions. The laws originated in the context of the government's commitment and compliance with international regulations not in the needs of businesses. Marai (2017) revealed that all environmental decisions have followed the international standards as specified in the binding international agreements that Egypt had signed and without discussion with the relevant actors. One law issued in 1994 within the environment plan treats international laws as a source for legislation that goes into effect without any localisation process.

On the positive side, these policies meet internationally-recognised criteria. For example, the agreement on hazardous materials that forbidden the use of pollutants that risks human health in 2003. Another example is the regional African agreements on protecting natural resources and the environment in 1971. Yet, the problem with these imported policies is that, sometimes, the country could not extract criteria and the capability for implementation. Based on Sharawy's (2020)

analysed data, private corporations continue to consume hazardous materials. Additionally, McKenna (2013) contended about the environmental regulations in Egypt replicating international organizations' suggestions that it produced alien laws. Even with the establishment of the MoE, the plan of 1994 remained one of the long-existent legislations.

The MoE has developed its amendments and laws based on its observation of the environmental situation and on an authoritarian basis which raised concern that the work of the MoE and its superiority in environmental protection conflicted with other involved ministries. This tells about the centralisation of policy formulation inside the MoE that even other ministries were detached from its work (McKenna, 2013). The centralised decision-making process is an evident representation of top-down participation. There was no participation of the corporations in setting these policies or influencing implementation strategies. The government overlooked corporations' interests and relied on imported policies that ignored the internal context that was exported. Furthermore, the corporations' interests were ignored. This leads to the discussion on the implementation process and its success.

3.2 Analysing the Environmental Policy: Participation in the Implementation?

Regarding the implementation process, the Egyptian government relied on two main agencies to execute and monitor the policies; EEAA and the MoE. The EEAA was regarded as an executive branch to set and manage the environmental plans for specific Industries (Ministry of State for Environmental Affairs, 1994). Additionally, it opens new horizons for offering consultation and guidance in setting environmental strategies as well. Nevertheless, based on McKenna's study of its work, this agency lacks both the institutional capacity and the know-how (McKenna, 2013). The author evaluated the consolatory role as insufficient. In some cases, the work of the providers of these services is merged into other departments, which reflects the absence of independent professionals. Similarly, this fragmentation affects professionals' performance within businesses as well as within government departments (McKenna, 2013).

Additionally, the MoE was held responsible for supervising all environmental agencies, developing new methods for detecting any environmental degradation or pollution and putting its source accountable for the harm it causes. It coordinates with other environmental agencies on how to monitor and charge polluters (McKenna, 2013). However, the absence of the required expertise to operate these agencies, allowed for corruption and bribery which shows the disadvantages of the top-down implementation. The MoE report, in 2009, on the performance of these environmental agencies admitted the defect in the work of the monitoring systems (Environmental Affairs Agency, 2009).

As a result of the centralised decision-making, the implementation process was constrained to the limited governmental capabilities that allowed for deficiencies that hindered the work of the monitoring system. The centralization of the agencies working on implementation marginalised other governorates and allowed for corruption and clientelism. Private corporations were expected to abide by these policies. Yet, all evidence about corruption and manipulation refutes that. Darwish (2014) revealed that corporations tend to prioritise their interests in dealing with environmental degradation.

Reflecting on the theoretical approach, the Top-down approach did not only manifest itself in the decision-making process and implementation but also in the consequences on the environment. McKenna (2013) in his field study on Egyptian policies proved that despite the insignificant contribution of Egypt to global pollution rates, Egypt had exacerbated its environmental issues by relying on environmental policies that are not adequately enforced.

Moawad, (2020) identified Egypt's environmental concerns in the poor management of resources and pollution and air pollution in particular. The management of resources and waste was central to the analysis of many scholars. The author went beyond analysing the situation to recommend recycling waste and replacing hazardous materials with more environmentally-friendly ones.

According to Eltayb (2021), there is huge gap between the environmental challenges that Egypt faces and the policies dealing with it. This also shows the top-down policy deficiencies that do not only undermine the businesses interests but also burdens the government. Abaza (2020) has also asserted that the Egyptian government has took it upon itself to protect the environment. Yet, this came at the expense of the government expenditures on environment.

4. The Environmental Policy in Egypt after the Adoption of the SDGs:

In the beginning, it must be noted that the new policy kept most of the environmental laws of the protection plan of 1994. These inherited laws have been emphasised in the MPED published handbook for sustainability standards. Most notably were the maintenance on the inefficient environmental penalties and charges. The samples of the inherited laws imply that these laws are outdated and do not fit into the new context of sustainability besides the top-down participation that is evident in these laws. For this reason, McKenna (2013) demonstrated that the SDGs must build on adequate laws. In an interview with the Senior Advisor of the Minister of Environment, he pointed out that these type of laws goes against the enabling conditions principle that guarantees the inclusion of private corporation in other stages of making environmental policies. In the words of the Senior Advisor of the Minister of Environment, during the interview, “this is not how Egypt should envision its future,” he added (personal communication, 2023).

Nevertheless, the government has issued new policies that were meant to serve environmental sustainability goals achievement. According to the Egyptian vision for 2030, the environmental sustainability goals could be classified into two categories. The first deals with enhancing environmental sustainability in existing projects. The second targets the transition to the green economy.

On enhancing the use of renewables, the government developed incentivising laws. For instance, law number 72 for the year 2017 states that the government will deduct 30% from the net taxes imposed upon businesses for all projects that rely

on or produce renewable energy (Ministry of Planning and Economic Development, 2021, p.17). Other laws that followed granted free-tax imported equipment to attract investors who are willing to operate green projects. (Elsobky, 2017, p.21).

In assessing environmental sustainability laws, the Senior Advisor of the Minister of Environment, referred to them in the interview as stimulating laws that incentivise private corporations. He contended that the laws play a decisive role in determining the way Egypt chose to take and they are a truthful indicator of participation. It is a simple equation of “Strong Enabling laws open the door for participation and vice versa,” he described. In further elaboration, the interviewee brought attention to the term “the enabling conditions” (personal communication, 2023).

However, Elsobky (2017) suggests supplementary regulations to support the governmental position on renewables. These are granting the producers of environmentally-friendly products some exportation incentives (Elsobky, 2017, p.23). Noting that Kandil (2020) maintained that the producers are still trapped by the high prices of renewables despite all the measures taken to ensure the rapid transition to renewables.

Moreover, the government incorporated the feed-in tariff policy. This policy is designed to increase the total amount of electricity generated from renewable energy and sold by the private sector to other entities (Ministry of Planning and Economic Development, 2021, p.43). Undoubtedly, this policy will diversify the sources of renewable energy and encourage the private sector entry and competition in the green industries. KarmSolar is a pioneering Egyptian private corporation that managed to benefit from fulfilling environmental goals by installing solar plants at homes and enterprises. (Ministry of Planning and Economic Development, 2021, p.64).

Unlike the regulatory laws that aim at stimulating businesses' environment, Green investments have clear and more decided goals in their nature. Therefore, the attention was centred on motivating the private sector to invest in green projects. In the year 2020, the government introduced green-bond investments in the Egyptian

market. These issuances are perceived by Eltayb (2021) as a long-aspired and inevitable step for the transition to environmental sustainability. In more detail, the author highlights some of the advantages of these issuances. These are offering low-interest loans and prioritizing green projects over others. This all facilitates hitting environmental sustainability targets. The author's analysis of the promising future of these green bonds is driven by reviewing the outside world's experience with green bonds.

The commentary on environmental laws varied between optimism and criticism of the current environmental sustainability laws in Egypt. This section spotted the inherited regulations and criticised running the environment with such inefficient laws. When asked during the interview to assess these laws, the Senior Advisor of the Minister of Environment asserted that to they constitute stimulating policies. Yet, the green bonds and the feed-in tariff policies were perceived as an advancement in environmental protection.

4.1 Decentralisation in Making Decisions

Power decentralisation is a decisive factor in searching for bottom-up participation. Decentralising power by including private corporations in the position of taking decisions for their sector has been emphasised by the government in the VNR that have explicitly written that all decisions have been taken with systematic collaboration between different stakeholders. The two reports used the term “golden triangle” to refer to the government, civil society & international organisations and private corporations (Ministry of Planning and Economic Development, 2021, p.86).

In the interview with the lead officer in the Unit of Sustainable Development at the Ministry of Planning and Economic Development, she was asked to elaborate on the different inclusionary statements in the voluntary reviews of the Egyptian government. The interviewee reported that special meetings are being held with the participation of all stakeholders including a representative sample of the private sector. “The government understands that no matter how effective the imported

policies were; this does not necessitate its effectiveness in the local context,” she emphasised (personal communication, 2023). Nevertheless, the government, as the VNR explained, due to the spread of COVID-19, couldn't pursue regular meetings with stakeholders (Ministry of Planning and Economic Development, 2021, p.10).

In the interview with the lead officer in the Unit of Sustainable Development at the Ministry of Planning and Economic Development, she asserted that the government extracted encouraging policies for the transition to the green economy. In the year 2020, the government introduced green-bond investments in the Egyptian market. These issuances are perceived by Eltayb (2021) as advantageous. It offers low-interest loans and prioritise green projects over others. This all facilitates hitting environmental sustainability targets. Eltayb (2021) drew a positive relationship between the government opening different doors for financing and the willingness to establish new projects. This assumption implies that the Egyptian government is intended to inaugurate a new system of permitting the private sector role in boosting green economy projects (Eltayb, 2021, p.33).

Reflecting on the theory, the attempts for power decentralisation are evident in the decision-making process. The government understands the role of private corporations and the need for localisation. The green policies allowed for delegating some of the governmental powers to other relevant actors from private corporations. Furthermore, consulting the relevant actors (private corporations) in formulating policies through meetings is another representation of bottom-up participation.

4.2 Limited Bottom- UP Implementation

As mentioned earlier, the bottom-up approach usually results in more efficiency that stems from knowing well market conditions and the willingness to effectively implement policies. Yet, the Egyptian government, in policy implementation, identified the participation of private corporations through training the private sector

to adapt to the new policies, sharing the costs of projects among different stakeholders and using advanced technology and smart solutions.

4.2.1 Training corporations

With regards to implementation, according to the lead officer in the Unit of Sustainable Development at the Ministry of Planning and Economic Development the workshops were organised with representatives of private corporations to train them on the implementation strategies. She put forward that the government's role at this phase is to keep the private sector on the right track to reach desirable results. (personal communication, 2023). Another display of this type of inclusion was with the United Nations Global Compact Network Egypt (GCNE). The GCNE is responsible for monitoring and modifying private corporations' behaviour to match the SDGs (Ministry of Planning and Economic Development, 2021, p.17). The interviewee added that the government has involved environmental professionals from the private sector, like Dcarbon, for training and providing private corporations with consultations. The role of those professionals, as inferred from the interviewee was complementary to environmental policies (personal communication, 2023).

4.2.2 Participation in Sharing Costs

The huge bulk of the VNR reports was dedicated to public-private partnerships with no specific emphasis on private projects and their independence (Ministry of Planning, Monitoring and Administrative Reform, 2018, p.60). The VNR revealed that public-private partnerships reduce government spending on projects as it shares the costs with private corporations in exchange for incentives (Ministry of Planning and Economic Development, 2021, p.76). In the interview with the Senior Advisor of the Minister of Environment, he asserted that "indeed government spending is now restricted by foreign conditions and that is why it is searching for financing resources" (personal communication, 2023). Furthermore, he reported that the public sector, contrary to what has been mentioned in the Egyptian vision of 2030, continues to compete with private corporations. He revealed statistics

about the role of private corporations shrinking to half of their original contribution to the Egyptian economy from 10 years with 65% to 21% in 2022” (personal communication, 2023).

4.2.3 Participation with Innovation

On the positive side, private corporations possess the advanced technology to implement governmental goals with optimal efficiency. The reports submitted by the government have mentioned the efficiency of the private sector in finding smart solutions and managing resources. The VNR of the year 2021 restated some of the examples in which corporations decide on implementation. icecairo and icealex were some examples that represent corporations fulfilling environmental goals while influencing implementation (Ministry of Planning and Economic Development, 2021, p.64). This claim stems from engaging them in deciding on and selling renewable energy not only for other corporations and individuals but also for the government.

The dilemma that conforms with the analyses from the first section is how the government is mostly concerned with the new green projects at the expense of the existing corporations. The government announced that priority will be given to the highest developmental projects that meet the needs of the citizens (Ministry of Planning, Monitoring and Administrative Reform, 2018, p.9). Conversely, the VNRs have been dominated by this type of green investment which shows the poor coordination between the economic and environmental goals of the country. More importantly, the circular economy and supply chain management were neither adequately emphasised in the reports or in the interview.

The reports have spoken for the deficiencies in environmental regulations. For instance, the VNR of the year 2021 gave an example of the Metro market replacing the old plastic bags with less-harmful plastic bags to comply with environmental rules (Ministry of Planning and Economic Development, 2021, p.58). That turned out to be harmful to the environment too. Eventually, the company could change the plastic bags to environmentally-friendly ones. In this case, the absence of clear

guiding laws costs a lot of money to cope with unexpected changes which distracts efficiency and might be a tool of manipulation.

Although participation in the implementation process was meant to allow for more efficiency, nevertheless, there is no evidence of how private corporations can influence the implementation of the goals. In other words, their role supports the adaptation assumptions not to influence changes. More importantly, is that the government began to utilise private corporations to achieve its environmental goals. Top-down participation was seen in training corporations to adapt to new environmental policies. Although the VNRs have showcased the success of new corporations in commercialising green services and therefore claiming their participation in implementation, the reports tended to undermine employing technology in non-green developmental activities to reduce environmental threats.

4.2.4 Uninformed Corporations?

In an interview with the Senior Advisor of the Minister of Environment, he raised concerns about information access in Egypt. He suggested that non-green developmental businesses that have long supported the Egyptian economy are now fleeing the Egyptian market. He pointed out that the phenomenon of private corporations resorting to the foreign market due to the burdens in the Egyptian market stems not from environmental considerations or sustainability in general. The principle is that there is no conflict between development and environmental protection, but, he continues, from the uncertainties in the Egyptian market that requires them to change their plans (personal communication, 2023).

The interviewee attributed the anticipated risk to the unstable macroeconomic policies under which these businesses operate that cannot provide an encouraging environment to accelerate the execution of environmental policies. He referred to the economic reformation measures suggested by the International Monetary Fund (IMF). “Environmental goals cannot be separated from the economic and political conditions surrounding companies; this is part of the enabling conditions” (personal communication, 2023). These measures constitute an “inhospitable environment”

for private corporations when managing their businesses. Operating according to the IMF conditions and terms requires rapid changes in the prices of basic supplies like electricity, lifting subsidies, and most importantly the price of foreign exchange. This unstable environment poses challenges to businesses as they are obliged to update their strategies and their budgets as well (personal communication, 2023). This assessment of private corporations' situation refutes any argument about an inclusionary approach in dealing with non-green corporations. It supports, however, the representation of top-down participation in the non-green corporation.

5. Conclusion

While analysing the formulation of policies before and after the SDGs, it was discovered that the government gave up the centralised decision-making of environmental policies and transitioned towards more inclusionary policies. Before the SDGs, the government approached environmental policies using a centralised decision making process; participation was limited to environmental agencies' members and there was no communication with outsiders. Other policies were adopted in compliance with international regulations without localisation. Beginning the new era of the SDGs, the government replaced this approach with more participatory one. The methodology revealed that the government has communicated private corporations in the initial policy formulation. Moreover, environmental sustainability goals were mainstreamed in all state apparatus. The government has also realised the importance of the localisation of environmental goals.

Drawing on the centralised decision-making process, the Egyptian government expected the participation of corporations in executing the environmental policies. However, corporations chose to manipulate these policies and abandoned environmental goals. Not to mention that the top-down policies unveiled the lack of institutional capability. Unlike the top-down implementation in the environmental

policies before the adoption of SDGs, different methods to integrate corporations in the implementation process post the adoption of SDGs. The government allowed green corporations to decide how to implement environmental policies that were inclusionary in its nature. The government also opened channels of training, benefited from innovation and expanded its role in public-private partnerships that reduce expenditures. Yet, concerns were raised during the interviews about the extent to which these corporations are informed about environmental policies.

As a result, the policy outcome of the centralised formulation of decision-making were unsatisfying to corporations as it required transitioning to less polluting materials which burdens corporations with costs. Based on former studies, the environment deteriorated and the policies failed and burdened the government with expenditures to improve environment. On the other hand, bottom-up policy attracted competition among green corporations and were regarded as promising for the sustainability goals

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Ecofeminism between The Aleppo Pines and Olive Trees: A Study of Palestinian Women's Resistance in The Occupied Territories in the West Bank

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Abstract:

The horticultural endeavor of cultivating olive trees, which is a prominent agricultural pursuit in Palestine, holds a profound significance that extends beyond the mere achievement of crop yield and economic prosperity (Simaan, 2017). Literature has showcased the symbolism of the environment and its resources in this conflict and has also touched upon its role in peace negotiations. Building on this, this paper seeks to analyse how environmental injustice, with a focus on water scarcity, has been utilized as a tool of both resistance and oppression by Palestinian Women in the West Bank and the Israeli settlers. To put it differently, this paper conducts a thorough examination of how Palestinian women have employed water as a means of resistance, while also considering how it has been used as a means of oppression by Israeli settlers. Accordingly, the complex intersectionality of gender, settler-colonialism, and 'environmental injustice' is analysed from an Ecofeminist perspective.

This paper delves into the intricate tapestry of non-violent resistance, as it unfolds within the enduring struggle of Palestinian women against the dual oppressive forces of settler colonialism and environmental injustice practices in the West Bank. It delves into the profound significance of the environment, with a specific focus on the pressing matter of 'water scarcity', as a means of exerting control and fostering resistance by all parties involved. It subsequently becomes apparent that Palestinian women, through their steadfast determination, have skillfully developed ecofeminist tactics that

prioritize their own empowerment and the preservation of their land and environment.

Introduction

One's thoughts turn to the Palestinians who have experienced the loss of their olive groves due to the activities associated with colonial settlement, resulting in the uprooting of over one million trees (Shqair & Soliman, 2022). The mental image of an elderly woman embracing a tree that was being felled by Israeli occupiers quickly comes to mind (refer to the photograph 1 below*).



*Mahfoutha Shtaya, 65-year-old who "inspired us when she stood up to Israeli soldiers and settlers in 2004 when they were uprooting hundreds of olive trees in her village-the source of her community's livelihood. Alone and defenseless, she clung to one of the few trees left standing. Her action spoke out powerfully against the wanton destruction and its disastrous effects for an already suffering people" <http://www.opendemocracy.net/blog/5050?page=7>

The situation of the olive trees in Palestine signifies more than just environmental degradation; it implies the rediscovery of a people's historical narrative. As well characterised by Ghada Sasa, the aforementioned "cultural bomb" endeavours to undermine the Palestinians' faith in their surroundings, their historical legacy of resistance, their collective solidarity, their capabilities, and ultimately their self-esteem (Sasa, 2023).

This study delves into the intricate tapestry of non-violent resistance, as it unfolds within the enduring struggle of Palestinian women against the dual oppressive forces of settler colonialism and 'environmental injustice' practices in the West Bank (WB). It investigates the profound significance of the 'environment', with a specific focus on the pressing matter of 'water scarcity' as a means of

exerting control and fostering resistance by all parties involved. It subsequently becomes apparent that Palestinian women, through their steadfast determination, have skillfully developed ecofeminist strategies that prioritise their own empowerment and the preservation of their land and the 'environment'.

I. LITERATURE REVIEW

The horticultural endeavour of cultivating olive trees, a prominent agricultural pursuit in Palestine, bears great significance that transcends mere crop production and economic prosperity (Simaan, 2017). The olive trees, in their steadfast presence, assume a profound symbolism that resonates with the unwavering determination of the Palestinian people. They embody a firm resolve, a relentless pursuit of liberation and justice, as eloquently expressed by Cadloff (Cadloff, 2021). Approximately 80,000 Palestinian households rely on the cultivation of olive trees as an essential means of sustenance (Qumsiyeh, 2019). Verily, this specific agricultural methodology comprises a substantial proportion, precisely 48%, of the agricultural expanse in the region. In accordance with the investigation conducted by Juman Simaan, it is imperative to underscore the paramount importance of olive trees within the Palestinian economy, as they make a substantial contribution of 14% to the overall economic composition (Simaan, 2017).

Contrarily, it is imperative to acknowledge that the KKL-JNF⁴² has undertaken a commendable endeavour in silviculture, by planting of approximately 260 million trees within the confines of the OPT⁴³. Based on a report published by the National Geographic in 2023, this undertaking encompasses the cultivation of Aleppo pine trees. The aforementioned holds a substantial share, specifically 13%, of privately owned assets in Israel, solidifying its position as the leading proprietor in the region (Glausiusz, 2023).

The Yatir Forest⁴⁴, a major outcome of the JNF's reforestation initiative, symbolises Zionism, with Aleppo pines as its emblem (Pearce, 2019). The reasons

⁴² Keren Kayemeth LeIsrael - Jewish National Fund is a non-profit organisation founded in 1901 to buy and develop land in Ottoman Syria for Jewish settlement. By 2007, it owned 13% of the total land in Israel. Since its inception, the JNF says it has planted over 240 million trees in Israel.

⁴³ Occupied Palestinian Territory. Palestinian territory – encompassing the Gaza Strip and West Bank, including East Jerusalem – has been illegally occupied by Israel since 1967.

⁴⁴ Planted in the 1960s by the Jewish National Fund (JNF), a non-profit land development agency that manages more than a tenth of the country, Yatir is Israel's largest planted forest. Had these hills been left alone, they might be covered in low shrubs like Jerusalem sage and hairy bread-grass.

are colonial, thus climatological benefits are irrelevant. “The portrayal of a forested Israel has perpetually ignited the imagination of conscientious Zionists,” expressed Jay Shofet, representing the SPNI⁴⁵ (Plant A Tree., 2021). Afforestation is highly politicised and links ecological principles, aesthetics, and cultural heritage. According to one scientist contacted by Pearce, this allows Israeli Jews to proclaim their existence (Pearce, 2019). Furthermore, it could potentially be construed as a calculated strategy of territorial acquisition. The development of the Yatir forest by the JNF, as an example, poses a significant threat to biodiversity, particularly endangering Indigenous species. As a result, several ecologists, including proponents of Zionism, express their opposition towards the initiative of reforesting the OTP with Aleppo pines (Berdugo, 2020).

In the aforementioned context, the ‘environment’ has demonstrated its pivotal role in the Palestinian-Israeli conflict since its inception. The complex interplay between environmental factors and the historical, political, and social dynamics of the conflict underscores its significance. The JNF was able to have considerable influence via two key mechanisms. Initially, as documented by Ghada Sasa, the JNF strategically presented itself as an environmental NGO, thereby mitigating international condemnation while actively encroaching into Palestinian territory and symbolically associating the pine tree with the ideology of Zionism (Sasa, 2023). During the celebration of Tu Bishvat, a Jewish settler expressed to Braverman that the provision of pine tree seedlings by the JNF was a cost-effective measure, since these saplings will eventually grow into a fully developed forest within a decade (Braverman, 2009). In this context, we see the inherent political nature of a tree, as it undergoes a transformation from a naturally occurring entity to assuming the role of a soldier, serving to protect and advance the interests of a settler state.

In a scholarly manner, it can be observed that literature has not solely fixated on the symbolic implications of 'environmentalism' within the context of the Palestinian-Israeli conflict. Rather, it has also shed light on the significant inclusion of the 'environment' itself, along with its valuable resources, as an indispensable

⁴⁵ Society for the Protection of Nature in Israel, or SPNI, is an Israeli non-profit environmental organization working to preserve plants, animals, and natural environments that represent bio-diversity.

component of the peace negotiation process (Ainara Huart, 2020). This phenomenon is clearly discernible within the context of the Oslo accords. The Oslo accords, a pivotal series of negotiations spanning from 1993 to 1995, have engendered profound transformations in the governance and exploitation of water resources, infrastructures, and provisions within the WB. There exist two discernible alterations that are particularly conspicuous, as elucidated by Selby (Selby, 2003). The aforementioned agreement has led to a notable rise in the allocation of resources for development aid. The main emphasis of this aid has been directed towards the restoration and enhancement of supply systems, as well as the establishment of water institutions inside the Palestinian Authority (PA) (Messerschmid, 2007). According to Selby, development assistance has had a notable impact on enhancing the quantity and dependability of water supply in different cities and villages in the WB, despite encountering various obstacles (Selby, 2013).

The aforementioned phenomenon is particularly conspicuous within the urban areas of Hebron, Bethlehem, and Jenin. This can be attributed primarily to the successful implementation of a substantial initiative backed by USAID. Significant advancements have been achieved in the management and treatment of wastewater and sewage systems, as emphasised by Al-Khatib et al. (Al-Khatib, Ajlouny, Al-Sari', & Kontogianni, 2014). The observed improvements have been ascribed to the adoption of contemporary technologies. The partitioning of the WB into three distinct zones posed challenges for the PA in managing resources. The PA encountered difficulties in accessing and utilising water and land resources in Areas B and C; ultimately, hindering their authority and ability to promote the interests of the Palestinian people (Selby, 2013). The enduring divide between Israelis and Palestinians, as observed by Alleson et al., exerts a substantial influence on their daily existence and future ambitions (Alleson, Levin, Brenner, & Al Hmaid, 2013).

As per Rouyer's analysis, the successful implementation of the Oslo II

agreement has yielded a discernible augmentation in the intricacy of institutional frameworks. Subsequently, a notable degree of bureaucratisation ensued (Rouyer, 1999). The formal establishment of the Palestinian Water Authority (PWA) as the authoritative entity responsible for overseeing and regulating the water sector within the region of Palestine has been duly recognised and ratified. According to the scholarly work of Brooks et al., it is evident that the Agreement has exerted a more substantial influence on the discourse surrounding the matter at hand, rather than effectuating tangible or substantive alterations (Brooks, Trottier, & Giordano, 2020).

According to the research conducted by Ben-Dror and Flamer, it is important to emphasise the insightful observations made by Uri Savir, a renowned Israeli negotiator. Savir highlights the inherent limitations of the Oslo II deliberations and agreements in effectively addressing the intricate issue of occupation, despite their stated objective of tackling this very issue (Ben-Dror & Flamer, 2023). The alleged consequences of the results are often described as verbose rather than substantial. Over time, there has been a noticeable change in how hydro-political dynamics are understood in the complex relationship between Israel and Palestine, specifically in the WB. According to Selby, the relationships between the parties involved were initially seen as inherently oppressive during the occupation. However, there has been a significant shift in the prevailing viewpoint, where these entities are now seen as more inclined towards collaboration (Selby, 2013). The change in perception was not caused by any modifications to the managerial or monitoring protocols. The procedures mentioned were primarily influenced by the Oslo II Agreement, as recognised by Al-Khatib et al., thus granting them a newly acknowledged legitimacy (Al-Khatib, Ajlouny, Al-Sari', & Kontogianni, 2014). Upon conducting an exhaustive analysis, one can deduce that the Oslo II water agreements did not yield significant progressions. The frequently employed phrase “transitional arrangement” is frequently construed as possessing a predominantly symbolic character rather than engendering substantial transformations.

The commendable nature of the ongoing cooperation between Israelis and Palestinians pertaining to water-related matters is particularly noteworthy, especially when considering the dearth of advancements within the broader peace process. In the initial phases of the intifada, the JWC⁴⁶ opted to abstain from convening any sessions. In January 2001, they issued a formal declaration urging the general populace to adopt a proactive stance in order to protect and fortify water systems against the potential perils that may arise from acts of violence, as expounded upon by Selby (Selby, 2013). Moreover, it is imperative to acknowledge that the PWA consistently bestows its approval for the establishment of novel supply routes to Israeli settlements. An exemplification of this event transpired within the inaugural months of the year 2002. During that particular juncture, the official authorisation for the construction of a pipeline was granted. The pipeline spanned a distance of 11 kilometres, while boasting a diameter of 32 inches. The primary objective of the project as discussed by Foltz, was to establish a vital linkage between the Green Line⁴⁷ and Gush Etzion⁴⁸ (Foltz, 2003).

Israel's approach in establishing authority over water resources, systems, and provisions in the WB is distinguished by a progressive and jurisprudential methodology. As per the findings of Al-Khatib et al., it is evident that the implementation of this particular approach has exerted a substantial influence on the immediate surroundings (Al-Khatib, Ajlouny, Al-Sari', & Kontogianni, 2014). As posited by Aloni, the contemporary strides made in provisions for Palestinian communities residing in the WB can be discernibly associated with the depiction of the occupation as a manifestation of "cooperation," thereby engendering a revaluation of prevailing conceptions (Aloni, 2018). The Oslo Accords and the wider peace process are commonly perceived as a means to enhance the legitimacy of Israeli-Palestinian engagements. They are perceived as a means of attaining credibility in such engagements. However, this study argues that while water infrastructure projects have promoted collaboration and stability, they may also have perpetuated the unequal allocation of water resources between Israelis

⁴⁶ The Israeli–Palestinian Joint Water Committee (JWC) is a joint Israeli–Palestinian authority, created in 1995 by the Oslo II Accord.

⁴⁷ The Green Line, (pre-)1967 border, or 1949 Armistice border,[1] is the demarcation line set out in the 1949 Armistice Agreements between the armies of Israel and those of its neighbors.

⁴⁸ is a cluster of Israeli settlements located in the Judean Mountains, directly south of Jerusalem and Bethlehem in the West Bank.

and Palestinians. Moreover, Israel may have strategically pursued water-sharing agreements to maintain control over water resources and exert power over Palestinians.

Within literary works, one finds a deep exploration into the intricate symbolism that resides in the 'environment' and its plentiful resources. These works shed light on the profound significance that the 'environment' holds in peace negotiations. The current scholarly article embarks on a profound analysis of the utilisation of 'environmental injustice' as a strategic tool for both defiance and oppression by Palestinian women in the WB and Israeli settlements. The present study aims to conduct a comprehensive analysis of how Palestinian women living in the WB and Israeli settlements strategically employ the concept of 'environmental injustice' to resist. The primary subject of this investigation is the intricate issue of water scarcity. It thoroughly examines the various strategies employed by Palestinian women in their determined efforts to access and use water resources.

Within the complex fabric of this situation, a deep understanding arises, acknowledging the contrasting roles that water plays. It is employed as a powerful means of control by Israeli settlers, while simultaneously serving as a source of strength for these resilient women. The interplay between gender, settler-colonialism, and 'environmental injustice' in Palestine highlights the importance of analysing their situation from an ecofeminist perspective, rather than solely as a political issue. It is crucial to acknowledge and appreciate the intrinsic qualities and societal contributions of women, as we strive to reclaim an identity that has been suppressed by oppressive forces.

Throughout a period exceeding seven decades, Palestinian women have demonstrated exceptional ability in devising and implementing a wide range of strategic methods. They have adeptly maneuvered through the challenging circumstances of occupation, aiming to resist, and overcome the oppressive forces that intend to dominate them. In accordance with the research conducted by

Elhindi and AlTaher, it is postulated that the necklace, meticulously fashioned from the revered olive tree, possesses an innate ability to enhance the captivating beauty of the neck area among Palestinian women. Its purpose, however, extends far beyond the realm of mere ornamentation. The notion of enduring resistance is commonly perceived as a formidable tool, as evidenced by its symbolic embodiment (Elhindi & AlTaher, 2023). As explicated by Nasser Abufarha, the pendant carries within it deep-seated historical and cultural implications, acting as a palpable manifestation of a bygone era, a land ensnared by the shackles of subjugation, and an indomitable heritage that endures across the annals of time (Abufarha, 2008).

Henceforth, a meticulous examination of the concepts of 'environmental justice', 'ecofeminism', and 'settler-colonialism' ensues.

II: STUDY FRAMEWORK-CONCEPTUAL AND THEORETICAL UNDERPINNINGS

Ecofeminist Karen Warren questioned in 1997, "Trees, forests, deforestation. Drought, water, desertification. Food, poverty, and pollution. environmental degradation and women". And women? How are **these** environmental challenges related to women? (Warren, 1997). Warren eloquently responded to her inquiry by asserting that the subjugation, appropriation, and exploitation of women and nature are inherently **"interconnected"**.

CONCEPTUAL FRAMEWORK

Laituri et al. underscore the significance of attending to 'environmental injustice', positing that societies ought to embrace the tenets of 'environmental justice' or 'eco-justice'. As per their contention, the deleterious ramifications of waste, the exploitation of resources, and detrimental land utilisation practices on underprivileged communities are indeed significant. These endeavours may serve to perpetuate the marginalisation and inequity among these individuals (Laituri, et al., 2021). Environmental sociologist Dorceta Taylor defines 'environmental justice'

as “the avant-garde of the ‘environmental movement that examines race, class, and gender in human-human and human-nature connections” (Taylor, 2011). The scrutiny of discrimination elucidates the harmful ramifications that individuals exert upon one another. The notion of ‘environmental injustice’ encompasses the historical and contemporary infliction of environmental damage, while also considering its correlation with socioeconomic and political transformations (Newell, 2005).

The notion of ‘environmental injustice’ pertains to the proposition that individuals who find themselves in a state of socioeconomic disadvantage are subjected to an inequitable distribution of the disadvantageous consequences stemming from pollution and various other hazards. The investigation of Anguelovski and Martínez Alier has discerned a noteworthy association between specific communal attributes, namely reduced economic means, marginalised populations, and a greater representation of women, and an augmented prevalence of waste facilities, industrial contamination, and sundry ecological predicaments (Anguelovski & Martínez Alier, 2014). As posited by Agyeman et al., the existence of compromised atmospheric conditions, tainted water sources, and depleted ecosystems has the potential to further amplify discrepancies in health outcomes among these specific demographic groups (Agyeman, Bullard, & Evans, 2002). One could argue, however, that the failure to acknowledge the disparate allocation of environmental benefits and detriments may inadvertently neglect the profound influence of human conduct and its subsequent repercussions on the intricate ecological balance.

According to Noel Wise and other critics, the resolution of ‘environmental injustices’ could yield substantial financial ramifications and conceivably hinder the trajectory of economic advancement (Wise, 2003). Nevertheless, there exists a contention positing that the implementation of more stringent environmental regulations would wield a notable influence upon enterprises, conceivably resulting in the loss of employment opportunities and heightened competition within the

international market. Alternatively, this study argues that this perspective may exhibit a deficiency in acknowledging the substantial long-term benefits and economic prospects associated with embracing the concept of 'environmental justice'.

The lack of scholarly discourse on 'environmental justice' within the internationally recognised boundaries of Palestine/Israel, as delineated in 1948, suggests that much of this research may not be relevant or applicable (Ainara Huart, 2020). Nevertheless, owing to the diminutive dimensions of the nation, ecological concerns are predominantly localised within its central region, thereby exerting an impact on the entirety of its populace (Foltz, 2003). The idea is that pollution and "injustice" in one place affect nearby areas. According to the assertions made by Alon Tal, an Israeli environmentalist, it can be inferred that individuals of Arab descent residing in Israel are inherently vulnerable to various forms of pollution, including but not limited to noise, water, and air contamination (Pearce, 2019). Additionally, Bishara posits that in the WB, there exist instances of 'environmental injustices', despite its relatively diminutive geographical expanse (Bishara, 2020). These surpass the events that occurred in Israel in 1948, as noted by Aloni (Aloni, 2018). Hence, this elucidates particular facets of the power dynamics inherent in settler-colonialism that might otherwise remain obscured under different conditions.

In her research, *'Divergent Visions: Intersectional Water Advocacy in Palestine'*, Emile McKee argues that 'environmental justice' requires a complete understanding of the many oppressed groups' different views on the natural world's benefits and dangers (McKee, 2021). McKee's careful research of al-Auja's⁴⁹ complex socioeconomic issues shows the potential benefits of combining a 'environmental justice' framework with intersectional theory in the OPT. This particular method illuminates the accounts of various communities and facilitates the examination of the interplay between environmental concerns and societal disparities, as well as serving as an approach to broaden the horizons of research endeavours, transcending the confines of basic group classifications (Ferree,

⁴⁹ Al-Auja (Arabic: العوجا) is a Palestinian town in the Jericho Governorate in the eastern West Bank, located ten kilometers north of Jericho.

2009).

THEORETICAL FRAMEWORK

This study adopts an **intersectional ecofeminist framework** as a means to augment the concept of 'environmental justice' that encompasses the complex interplay between race, socioeconomic status, and gender. In the noble quest for 'environmental justice,' it befits us to employ these notions as a means to redress the fundamental origins and mechanisms of societal inequity. Ecofeminism promotes the integration of the 'environment' and human civilisation, seeking to alleviate the adverse effects of dualistic thinking that negatively impact both the 'environment' and social systems (Warren, 1997). The critique levied against intersectional ecofeminism pertains to its purported neglect of the intrinsic value of individual experiences and the potential erosion of human agency, despite its recognition of the connection between diverse manifestations of oppression (Salem S. , 2018). Detractors contend that the theoretical construct of intersectionality exhibits a propensity to prioritise identity politics, thereby obscuring more comprehensive policy and societal deliberations (Kings, 2017).

Intersectional ecofeminism emphasises a holistic approach to environmental issues that considers race, class, gender, and other intersecting identities (Salem S. , 2018). In addition, it seeks to challenge and destroy the power structures that perpetuate 'environmental injustice' by acknowledging the complex relationship between gender and the notion. Nonetheless, a myopic focus on identities in environmental issues might hinder fair and unbiased responses. This framework proves to be highly advantageous as it effectively discerns instances of racial discrimination and identifies instances of ecological degradation (Singer, 2020). The application of an intersectional ecofeminist framework thus allows us to use theoretical constructs to actively participate in 'environmental resistance and undertake purposeful endeavours.

Kings posits that the adoption of an intersectional lens is of utmost importance when undertaking the examination of ecofeminism. The proponents fervently

champion a discerning manifestation of ecofeminism that confers importance upon diversity while concurrently repudiating essentialist viewpoints (Kings, 2017). Kings asserts that the nexus between the exploitation of natural resources and the subjugation of women engenders an intersectional facet within academic investigation. Moreover, it is advisable to exercise prudence when embracing the concept that ecofeminism inherently embodies intersectional thought, as a rash acceptance of such an idea may inadvertently undermine the contributions made by intersectional feminists (Kings, 2017).

The ecofeminist critiques provide a detailed analysis of the power dynamics that impact marginalised communities, as discussed by Mallory (Mallory, 2007). Henceforth, the allocation of land and water resources exhibits a conspicuous asymmetry that could be deemed inequitable. Within the context of the OPT, it is evident that the Israeli and Palestinian communities face significant discrepancies in terms of land and water resources, as highlighted by Aparicio (Bronstein Aparicio, 2014). By examining water politics and transcending the simplistic binary divisions, one can discern the possibility of achieving a harmonious reconciliation between Arabs and Jews, women, and men, and even culture and the environment. This revelation, as expounded by Aloni, unveils a promising path towards unity and understanding (Aloni, 2018).

Contrary to prevailing scientific epistemologies within environmental research, ecofeminism, and the concept of 'environmental justice' advocate for the incorporation of "localised" knowledge. According to legal scholar Giovanna Di Chiro (Di Chiro, 2008), 'environmental justice' advocates must incorporate Indigenous wisdom to gather empirical data that proves a land use's negative effects on human and nonhuman community members. It also emphasises the interconnectedness of social and 'environmental justice', understanding that hegemonic paradigms and socioeconomic systems cause both (Asnani, 2021).

Ecofeminist strategies aim to address these interconnected issues and promote a more just and sustainable world and differ from one context to another.

However, below are some of the key ecofeminist strategies employed (Rizzo, 2018):

- **Revaluing Women and Nature:** Ecofeminism aims to critique the prevailing patriarchal perspectives that frequently marginalise women and the natural environment. This entails acknowledging the inherent worth of women and the 'environment', while shifting away from objectification and exploitation.
- **Environmental Justice Advocacy:** Ecofeminism calls for 'environmental justice', which entails ensuring that marginalized communities, often disproportionately affected by 'environmental issues, have access to clean air, water, and a healthy 'environment'. This strategy involves supporting and amplifying the voices of those most affected by environmental degradation.
- **Community-Based Solutions:** When it comes to environmental issues, ecofeminism places a premium on "localised" and community-based approaches. Sustainable, environmentally friendly techniques that provide local people with a voice in environmental policy making are at the heart of this strategy.
- **Cultural Transformation:** Ecofeminists work to dismantle and replace patriarchal and exploitative cultural myths. To achieve this goal, it may be necessary to reconsider moral and philosophical principles that have led to the deterioration of the 'environment' and the subordination of women.
- **Sustainable Agriculture and Food Systems:** When compared to industrialised and monocultural farming systems, ecofeminism tends to advocate for sustainable agricultural practices that put an emphasis on biodiversity, soil health, and community well-being. This strategy is designed to encourage better connections to the land and the food systems.
- **Women's Leadership and Empowerment:** Ecofeminism recognises the significance of women's leadership in environmental and social justice movements. This strategy involves encouraging the active participation of

women in decision-making processes related to environmental policy and sustainable development.

- **Nonviolent Direct Action:** Certain ecofeminist groups partake in nonviolent direct interventions, such as organised protests and demonstrations, with the intention of raising awareness regarding ecological and societal inequities. Their objective is to advocate for transformative measures from governing bodies, corporations, and establishments.
- **Educational Initiatives:** Education and knowledge of the interrelatedness of gender, environmental, and societal concerns are important tenets of ecofeminism. Motivating people to work towards a more equitable and sustainable world is at the heart of this strategy.

Understanding gender and ‘environmental injustice’ in settler-colonial initiatives may be difficult, but this paper suggests that doing so from a settler-colonial theoretical framework and an intersectional ecofeminist viewpoint might assist. Wolfe states that settler-colonial theory holds that Indigenous regions are still colonised, and that this colonisation continues to affect Indigenous peoples today. Scholarly work on settler-colonialism, according to Regan (Regan, 2020) investigates the ways in which colonisers legitimise territorial claims by portraying themselves as the “new Indigenous” via the displacement and replacement of indigenous populations.

John Locke and Thomas Hobbes advocate examining the beneficial features of settler-colonialism. They claim that settler-colonialism has increased economic, technical, and living conditions in colonised regions (Regan, 2020). Regan adds that settlers’ infrastructure, education, and governance contributions have had a lasting influence on these places. However, decolonisation theorists, anti-imperialists, and Indigenous activists argue that this view oversimplifies complex historical contexts and dynamics, overlooking Indigenous communities’ agency and resistance, and displaces and marginalises them, resulting in the loss of land,

resources, and cultural heritage (Veracini, 2017).

Settler-colonialism destroys to gain power, according to Patrick Wolfe in *'Settler Colonialism and the Elimination of the Native'*, "territoriality represents the distinct and fundamental component of settler-colonialism," therefore "the principal impetus behind eradication lies in the pursuit of territorial control" (Wolfe, 2006). In settler-colonial settings, land appropriation is justified by the notion of "proper use," which holds that Indigenous communities are not using the land efficiently (Busbridge, 2018). For instance, Zionist thinkers saw Palestine as "a barren landscape awaiting the rejuvenation and flourishing efforts of Jewish settlers, with the ultimate goal of reviving the land's vitality" (Tal, 2016).

The rigid commitment to this "**logic of elimination**" separates settler-colonialism from colonialism, which relies on resource exploitation (Busbridge, 2018). Henceforth, the zenith of a settler-colonial enterprise undergoes a transformation, relinquishing its initial manifestation—albeit with the contention that the settler is incapable of completely integrating into the Indigenous culture (Bishara, 2020). Kyle Whyte, however, emphasises settler-colonialism as ecological domination that creates 'environmental injustices' against Indigenous people. Whyte's *'Settler Colonialism, Ecology, and Environmental Injustice'* explains the far-reaching effects of settler-colonialism's policies, which target every aspect of Indigenous societies (Whyte, 2018). Whyte, like Wolfe, values settler-colonialism's "injustice" towards Indigenous people. He sees it as eliminating Indigenous society and denying another culture the chance to live together (Whyte, 2018).

This paper argues that the settler-colonialism as an interpretive framework that yields significant theoretical and pedagogical ramifications for re-contextualising perceptions of the conflict in Israel-Palestine. It also presents a significantly more precise depiction of the conflict compared to the conventional narrative of Palestinian wrongdoing and Israeli vulnerability. According to Ilan Pappé, the concept of settler-colonialism continues to be the most pertinent framework for understanding the dynamics of Israel-Palestine up until the present time (Pappé,

2012).

III: METHODOLOGY

To facilitate the progression of this study, the researchers utilised a qualitative methodology to acquire pertinent data. The methodologies encompassed a diverse array of techniques, specifically semi-structured interviews conducted with Palestinian women who have resided in the WB, alongside the meticulous gathering and examination of secondary sources. The aforementioned secondary sources include textual data that was extracted from authoritative documents, journalistic pieces, previously published academic papers, scholarly articles, and reports issued by NGOs.

IV: DISCUSSION - FROM TREE PLANTING TO ECOLOGICAL COLONISATION

The protracted and intricate Palestinian-Israeli conflict encapsulates a multitude of historical, political, and social complexities. The aforementioned factors have been subject to thorough discourse, with the 'environment' being a central element of the conflict since its inception. It has been employed as a means of exerting dominance, shaping collective identities, and resisting occupation. The purpose of this section is to highlight the environmental challenges that Palestinians in the OPT experience and to throw light on how these challenges, which are often disregarded, may be used to recover identity and appropriate land.

Bishara argues that the continued growth of Israeli settlements, the building of the separation wall, and the destruction of Palestinian houses have all contributed to the uprooting of Palestinian communities (Bishara, 2020). Forcible relocation not only violates the rights of the displaced people, but also has a devastating effect on the 'environment'. The destruction of forests and the degradation of arable land are only two examples of how human settlements degrade natural environments. In addition to restricting Palestinians' access to their own resources, the partition wall affects natural corridors. As a result,

Palestinians face a number of problems (Sasa, 2023): water shortages, waste management issues, agricultural challenges, and serious threats to public health.

Water scarcity is a critical 'environmental challenge faced by Palestinians in the OPT as a result of the expansion of the Israeli settlements. Israel exercises significant control over the region's water resources, leading to an inequitable distribution of water between Israelis and Palestinians. Palestinians suffer from limited access to clean drinking water, agricultural irrigation, and sanitation services, severely hampering their quality of life. This water crisis not only creates a humanitarian emergency but also contributes to heightened tensions and a sense of injustice among Palestinians. According to a press release from the PCBS⁵⁰ in 2010, the most crucial water risk stems from Israeli procedures and actions implemented to curtail Palestinian access to water (PCBS, 2010). One of the actions undertaken by Israel "is the limiting of the amount of water extracted from Palestinian wells where it should not exceed 100 cubic meters per hour, and preventing the Palestinians from drilling new wells or the depth of approved wells should be no more than 140 meters. Israel denies the Palestinians from using the waters of Jordan river and impedes the supply of water to local municipalities" (PCBS, 2010).

As a result of water shortages, farmers in local Palestinian villages were forced to diversify from their traditional crops and move towards crops that are less water-intensive, although less profitable. For instance, farmers of Al-Auja for a long time were mainly relying on citrus fruit but have lately been compelled to shift to less water-intensive vegetable crops such as zucchini, squash, and cucumber (Amnesty International, 2017). Additionally, the villagers of Furush Beit Dajan have attested that aquifers are exhausted by the neighboring Israelis settlements of Hamra and Mehora and this has drastically decreased the supply of water.

In addition to water scarcity, Palestinians are currently grappling with the issue of solid waste for several reasons including, a growing population, limited access to necessary materials and resources for proper waste management, a lack of technical expertise, and the enduring impact of Israeli occupation on the

⁵⁰ Palestinian Central Bureau of Statistics.

Palestinian Territory. As a result of this occupation, the Palestinian land has been utilised as a dumping ground for industrial solid waste and wastewater originating from Israeli settlements constructed on Palestinian soil. Much of this waste consists of high-risk industrial materials, posing a significant threat to the Palestinian 'environment' and both surface and groundwater sources (PCBS, 2010).

The environmental conditions in the OPT pose significant health risks for Palestinians. The proximity of Israeli settlements and industrial zones to Palestinian communities leads to the release of hazardous pollutants, including toxic chemicals and wastewater (Al-Khatib, Ajlouny, Al-Sari', & Kontogianni, 2014). The lack of proper waste management infrastructure and the destruction of Palestinian sewage treatment facilities further aggravate these risks. As a result, Palestinians suffer from increased rates of respiratory diseases, skin conditions, and other health issues. The dire state of environmental health deepens grievances, engendering frustration, and resistance among Palestinians (Plant A Tree., 2021).

Of the abovementioned environmental conditions, water scarcity, the oppressive tool used by Israelis, has proven to be the umbrella issue under which most environmental issues lie. When analysing environmental challenges related to water one can categorise it into two main relevant areas:-

- the quality of water
- the accessibility of water

V. ANALYSIS AND FINDINGS - THE INTERSECTIONALITY OF ECOFEMINISM IN THE WEST BANK AND ECOFEMINIST STRATEGIES

Considering the abovementioned discussion of the roots of the Palestinian-Israeli occupation and the current environmental challenges being faced, it is important to note that the impact of such issues, however, vary across different

groups of people. According to a report published by UN Women (Said, 2019), “impacts of the occupation and environmental issues vary as per a large number of socioeconomic and political factors including region, type of residence, proximity to border and closed areas, exposure to occupation-related risk, family size, household composition, type of family -- nuclear, extended; single-member, large family; head of household, marital status, GBV⁵¹, overall protection threats including violence against children and women, level and type of education, skills, gender, age, work and employment”. In other words, there are several groups who are particularly impacted by such challenges and are, therefore, referred to as “vulnerable groups”. Hence, using the intersectional ecofeminist theory, this section aims to investigate how Palestinian women in the WB, who are classified as a “vulnerable group”, are specifically affected by the environmental difficulties arising from the occupation.

The **first assumption** of intersectional ecofeminism identifies the interconnectedness of the oppression of women and the degradation of the ‘environment’ (Caputi, 2016). Put simply, one can discern a robust correlation between the subjugation of women and the utilisation of nature for exploitative purposes. In the context of the Palestinian situation, it is evident that women find themselves subjected to marginalisation and subjugation as a result of the prevailing settler colonialism and the inherent presence of ‘environmental injustice’. Here it is important to understand the demographics of the OPT. According to (ESCWA, 2023), of the 5.35 million estimate population of occupied Palestinian territory, 2.63 million are female and 2.72 million are male.

More importantly, 12% of households in Palestine are headed by females (ESCWA, 2023). Given the context of the conflict, and in addition to the above-mentioned official records, women are mostly the primary breadwinners and decision-makers of households, due to various reasons such as the death or absence of male family members, economic circumstances, or other factors. Therefore, they (female heads of households) are responsible for collecting, storing, and using water for drinking, cooking, cleaning, and other domestic

⁵¹ Gender-based violence.

purposes. This paper undertakes a comprehensive examination of the ramifications stemming from water-related impediments, with a particular focus on their effects on two aforementioned domains, namely Water Quality and Water Accessibility.

I- Water Quality:

The assessment of water quality encompasses many key factors, as outlined in a report published in the EMHJ⁵² in 2016. These factors include the percentage of salt, the presence of contaminants, and the availability of appropriate treatment methods. In the Gaza region, the main source of piped water supply is derived from the coastal aquifer, which spans from Haifa to the Sinai desert and includes the Hebron Mountain area. The water in question is sourced from subterranean aquifers to serve a variety of purposes. However, its quality has been damaged due to pollution by saltwater infiltration and the presence of chemical substances such as pesticides. The pursuit of desalination is undertaken with the aim of augmenting the production of bottled water, as shown by the existence of seven publicly owned desalination plants and a multitude of privately owned ones. According to available data, it can be observed that a significant portion, specifically around 83%, of the population relies on water that is provided through the use of tanker trucks (MacDonald, et al., 2016).

While desalination plant water is of good quality, contamination arises during distribution and storage due to poor handling. Bottled water, both local and imported, constitutes a significant portion of water consumption, with limited data on microbiological quality. Rainwater harvesting, common in the WB, is infrequent due to low rainfall and geographical limitations in Gaza (MacDonald, et al., 2016). This compromised water quality has impacted Palestinian women's health drastically. According to MacDonald et al., pregnant, and lactating women are more susceptible to illnesses caused by waterborne pathogens, such as hepatitis E. This increased risk and severity of illnesses can be attributed to immune alterations that occur during pregnancy. Moreover, it is important to note that the presence of contaminants, such as pesticides, can potentially traverse the

⁵² Eastern Mediterranean Health Journal.

placenta, leading to adverse effects on the development of the fetus (MacDonald, et al., 2016).

//- Water Accessibility:

In addition to Water Quality, among the tools of Israeli Occupation is the impact of Israel's discriminatory policies on Palestinians' **access** to adequate supplies of water. Amnesty International (2017) have referred to this as the "Occupation of Water" (Amnesty International, 2017). The available data indicates that women have been disproportionately affected by the issue of water accessibility when compared to men. The early onset of arthritis and rheumatism in relatively young rural women is identified as a significant health issue in the 'Ayn Arik area, as reported by a Palestinian physician working at a local clinic. Their arduous work, which includes agricultural labour and daily water carrying, is largely responsible for the disability. While men develop symptoms much later, at about age sixty, women manifest them as early as age forty. His observation is not an isolated one. Based on a study conducted at a Palestinian clinic (Bellisari, 1994), the records of disease diagnoses for a one-year period indicate that women had higher rates of arthritis compared to men.

Considering the above discussion of the repercussions stemming from the inadequate access to and subpar quality of water on women, it becomes increasingly apparent that the foundational premise of ecofeminism holds true. Data has shed light on the undeniable interconnectedness between the role of women and the deterioration of the environment. The symbiotic relationship between the oppression of women and the degradation of the environment becomes vividly evident, reinforcing the idea that both aspects are intrinsically interwoven and must be addressed collectively.

Ecofeminist strategies, mentioned earlier, aim to address these interconnected issues, and promote a more just and sustainable world. Through the semi-structured interviews conducted for this research found that Palestinian women have employed most the of these ecofeminist strategies as a tool of resistance in

many ways. For instance, women in the WB gather annually in October for olive picking (Personal Communication, 2023). This annual olive picking celebrations are led and organised by women to maintain culture and identity and push for environmental advocacy through **community-based efforts**. Additionally, women are heavily involved in weekly protests since 2012 to remove restrictions to access to water in the village of Nabi Salah (Personal Communication, 2023) showcasing **women's leadership and empowerment**. Furthermore, Palestinian women consistently engage in searching for underground wells within their villages, demonstrating a **form of nonviolent indirect action** (Personal Communication, 2023).

Moreover, **educational initiatives** have also been an integral part of ecofeminist strategies employed by Palestinian women in the WB. For instance, in January 2009, the WASH⁵³ Cluster in Palestine was activated with the primary objective of coordinating the humanitarian planning and response related to WASH in the WB and Gaza (United Nations, 2022). The Cluster operates through a partnership that involves various entities, including National and International NGOs, UN agencies, IOs, and educational institutions. All these entities collaborate with local authorities in the WB and Gaza to address WASH-related challenges and implement projects aimed at improving water, sanitation, and hygiene conditions in the region. The Cluster plays a crucial role in ensuring a coordinated and efficient response to WASH needs and emergencies in Palestine.

For instance, one of the associations parts of the WASH Cluster is known *Ard El Ensan Palestinian Association* (AEI) which works on WASH campaigns that spread awareness among Palestinian women. From 2018-2022, AEI initiated WASH Awareness sessions implanted in all Governorates, "Gaza, North, Middle, Khan Younis and Rafah" targeted 6600 women (United Nations, 2022). Other associations have worked on providing gender-responsive WASH services for the most vulnerable households headed by women in Gaza, for example, the *AISHA* Association for Women and Child Protection. Furthermore, the Agency for Technical Cooperation and Development (ACTED) has implemented projects to

⁵³ Water, Sanitation, and Hygiene.

improve water quality, i.e., providing water tanks and latrines to vulnerable households, emptying wastewater, etc.

Conversely, the Israeli settlements respond to these types of resistance with a high degree of harsh measures. According to the researchers' personal communication with one of this study's interviewees in 2023, Israeli settlers reportedly plug all wells discovered in villages with cement, potentially denying Palestinians access to them. Moreover, all roads to access water fountains or wells are obscured by checkpoints. This is further exacerbated during difficult situations such as heat waves (Personal Communication, 2023).

Hence, based on the available evidence, it may be inferred that Israeli detrimental acts exhibit a higher degree of efficacy, even in the face of resistance from Palestinian women. The aforementioned phenomenon might be ascribed to the formidable barriers of a structural and/or institutional nature. The Oslo Accords, originally intended as a temporary agreement, granted Israelis complete authority in controlling resource access, so destroying all avenues of resistance.

In a broader context, it can be observed that the aforementioned resistance has undergone a notable transformation, wherein its political underpinnings have gradually diminished in significance, giving way to a more pronounced economic orientation (Personal Communication, 2023). Additionally, there is an assertion that this form of resistance has shifted away from its primarily political nature and is evolving into an economic focus. Palestinian households are currently grappling with significant economic challenges that have taken precedence over political resistance in the current context.

CONCLUSION

When contemplating the concept of warfare, the majority of people hardly consider the role of trees. Trees are classified alongside birds and the sky, exhibiting a passive and neutral stance towards warfare, since they are not seen

as a means to augment it. In her analysis, Iru Braverman examines the interconnectedness of politics and environment through the lens of settler colonialism and identity (Braverman, 2009). When recounting the narratives around the tree, its tangible structure is transformed into a far more profound entity. The concept of collective memory encompasses both a reaction to a communal experience and its role in shaping the experience itself. In the case of Palestinians and Israelis, their interpretations of the tree symbolise contrasting narratives: the Israeli Aleppo pine tree represents a collective memory that has taken hold, while the Palestinian olive tree signifies a collective memory that has been displaced (Ainara Huart, 2020).

In essence, this scholarly article has undertaken a comprehensive analysis of the symbolic significance attributed to the 'environment' in the enduring Palestinian-Israeli conflict. By drawing upon extant scholarly works that delve into the environmental aspect of the conflict's initial phases and its subsequent resolution through peace negotiations, this study adopted an intersectional ecofeminist lens. The discourse at hand specifically delved into the intricate role of the 'environment', with a particular emphasis on water resources, as a dualistic instrument wielded by Palestinian women as a means of resistance, while simultaneously serving as a mechanism of subjugation employed by Israeli settlers.

The findings of the study indicate that, notwithstanding the utilisation of ecofeminist strategies by Palestinian women, the impact of Israeli endeavours has been more substantial, primarily attributable to the existence of formidable structural and institutional impediments.

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The Post-2015 Discursive Construction of the EU as a Security Actor in the Mediterranean

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Abstract:

The European Union (EU)'s perception and construction of its, performative, representational image and character, and self-other dichotomy vis-à-vis the Mediterranean underwent significant, transformative, discursive changes over the past few decades. Such shifts in the EU's discourse demonstrate its keenness on presenting itself as a regional hub for civilization, stability, and democratic values, and distinguishing itself from the locus of cross-border threats and dangerous and conflict ridden other, with whom it shares boundaries. Furthermore, they laid and modified the foundation upon which its security architecture rests and interests are articulated and vocalized (C.F. Cebeci and Shumacher, 2016). The conflict-induced instability and vulnerability of the southern neighborhood had implications on the EU's perception of and engagement with the Mediterranean which subsequently informed its discursive construction of the area as well as its security approach, agenda, and practices towards it. The last version of the European Neighborhood Policy (ENP) toward the Mediterranean in 2015 (European Commission, 2015), which stresses stabilization over issues of democratization, followed by the subsequent release of the EU Global Strategy in June 2016 (European External Action Service, 2016) and the incremental development of the collective EU defense architecture (Ibid, 2016) invite for further research on the nature of the evolution in the EU continuous efforts to construct itself as a security actor, especially in the Mediterranean. Accordingly, this study,

situated in previous interpretivist scholarly production on EU-Mediterranean relations seeks to investigate continuities and changes in the EU discursive construction of its identity as a security actor (in light of these recent developments) and its implications on the Mediterranean, as one of the most important areas in which the EU has been historically active as a security (as well as a developmental) actor. The analysis uses a critical constructivist approach to identify first the novelty in the EU self-construction as a security actor and second to analyze subsequent EU mapping of the Mediterranean other. Building upon Bourdieu's (1977) field theory and concept of habitus, the analysis extends to critically examine EU security practices in the Mediterranean post-2015 with the aim of identifying how processes of European self-construction and threat perception are translated into actions toward the Mediterranean with a focus on the developments in the EU self-construction as a security actor post-2015 and its security perceptions and practices in the Mediterranean.

Introduction

Over the past few decades, the European Union (EU) has experienced significant transformative and discursive changes in how it perceives and constructs its performative, representational image and character, as well as its self-other dichotomy, vis-à-vis the Mediterranean. These changes in the EU's language show how eager it is to portray itself as the center of civilization, stability, and democratic values in the region and to set itself apart from the dangerous and conflict-ridden other that it shares borders with. Moreover, they established and altered the base upon which its security architecture is based and its interests are expressed (C. F. Shumacher and Cebeci (2016).

The process by which the EU draws its borders involves mapping both the Mediterranean region and itself gradually and in phases. In light of this, the EU's

interest-driven and evolving views and perceptions toward the Mediterranean led to changes in strategic narratives, policy decisions, priorities, securitization acts, perceptions of threat, and the first's involvement in the region and subsequent exposure of the latter to othering discourses (C. G. 2017 saw Cebeci and Schumacher.

The post-Cold War era witnessed the beginning of scholarly production on the EU as a security actor. In 2003, the EU saw the emergence of an institutionalized security domain and system that was growing in size to counter growing threats in the region, following the Maastricht Summit and the adoption of the EU's security strategy (Stefanova, 2005, p. (51). In this sense, its emergence as an actor is deeply rooted in its growing or intensifying concern over strengthening its defenses and border securitization in light of the significant shifts, transnational threats, and instability the region has seen, especially in the wake of the Arab Spring upheavals.

The EU's perception and engagement with the Mediterranean were impacted by the instability and vulnerability brought about by the conflict in the southern neighborhood. This resulted in the formation of the EU's discursive agenda regarding the Mediterranean as well as its security approach and practices. Put differently, by relying on discourses and dichotomies that situate the EU and the Mediterranean on opposing or unequal sides, the employed frame serves to reinforce the EU's normative superiority and difference.

It can be argued that the framing of the defenselessness and fragility of the neighboring south and the surrounding areas as a direct threat to the safety and security of the EU has invoked or initiated what appears to be a shift in the EU's discourse from pluralism, multiculturalism, and community expansion to securitization. Stated differently, it resulted in the development and reinforcement

of a security-focused or goal-oriented methodology that aligns with its revised perspective.

Research on the nature of the evolution in the EU's ongoing efforts to establish itself as a security actor, particularly in the Mediterranean, is encouraged by the most recent version of the European Neighborhood Policy (ENP) toward the Mediterranean (2015) (European Commission, 2015), which prioritizes stabilization over democratization issues. Other developments that followed include the June 2016 release of the EU Global Strategy (European External Action Service, 2016) and the gradual development of the collective EU defense architecture (Ibid, 2016).

In contrast to previous strategies, which placed a greater emphasis on security concerns related to terrorism, hybrid warfare, energy insecurity, and economic uncertainty, the EU Global Strategy explicitly described and presented the EU as a security actor in a changing security environment. The speech act pertaining to securitization was accompanied by a reorganization of the geographical boundaries of the "Southern Mediterranean" region, encompassing the Mediterranean, Middle East, Africa, and Central Asia (Ibid, 2016, p. 25-35) as well as the environs around them.

The EU's enlargement policy's shifting language and reasoning are a perfect illustration of how its practices have become more flexible in order to reflect the interdependent relationship between discourse and practice. Nowadays, its security-influenced or guided approach determines its application and scope. Stated differently, their scope has expanded beyond the union's admission and membership requirements. The EU Global Strategy (2016) lays out that they suggest, more accurately, an extension of the European core through joint and cooperative efforts to improve or enhance the "stability, strength, and resilience" of the surrounding areas of its neighboring southern borders and frontiers (Lannon, 2017, p. 214).

Overall, the narrative surrounding and framing the relationship between the EU and the Mediterranean is reflected or emulated by this new security dimension and language. As previously mentioned, it intensifies the feeling of urgency and emergency (EEAS, 2016, pp. 9-13) when addressing the risks and threats that the incapable and feeble Mediterranean other presents, which the normatively superior and distinct EU needs to combat.

Research Problem and Questions:

Based on previous interpretivist scholarly production on EU-Mediterranean relations, this study aims to examine the EU's discursive construction of its identity as a security actor and its implications for the Mediterranean region. The Mediterranean region is considered to be one of the most significant areas in which the EU has historically been active as a security actor, as well as a developmental one

Using a critical constructivist methodology, the analysis first identifies the novel aspects of the EU's self-construction as a security actor, and then examines the EU's subsequent mapping of the Mediterranean other. A critical examination of the EU's securitization, politicization, and depoliticization processes in the Mediterranean is part of this, as is the question of whether the attitudes and practices that emerged after 2015 represent a shift or, more accurately, preserve durability.

The main question of this study is:

How the developments in the EU self-construction as a security actor post-2015 reflect on its security perceptions and practices in the Mediterranean?

This study's central query, which can be divided into the following sub-questions:

1. In what ways does the EU's self-construction as a security actor mirror and diverge from its framing narratives in the Mediterranean?
2. How does the EU map and interpret the threats in the Mediterranean?

3. What are the Mediterranean depoliticization, politicization, and securitization processes occurring in the EU and how are they changing?

Literature Review:

The EU's threat construction and securitization over the past few decades have drawn a great deal of scholarly and academic attention, particularly in light of their increasing reliance on tools and framing techniques. Scholars and professionals in the area frequently highlight three main or prominent themes in the literature as the framework for their theoretical contributions and creations.

The development of the European Union as a unique security actor is the subject of the first strand. First off, scholars generally agree that because of its institutional structure, the EU is not a typical or conventional security actor (Reiker, 2007, p. 7. According to Stefanova (2005), the EU is viewed in this context as a singular actor with recognizable traits and identity. It projected or possessed a civilian character, in contrast to standard actors (Larsen, 2002, p. 285; Duchêne, 1972), and depended upon multilevel governance and civilian instruments (Marks and Hooghe, 2001, p. 2. Furthermore, it no longer possesses conventional military capabilities because it still operates in tandem with NATO or under its auspices (Ibid, 2005), casting doubt on conventional notions of security and security actors (Walt, 1991, pp. 211-239). The disagreement among academics and researchers regarding what constitutes security exacerbates this even more.

The European Union has been implementing an apparently expanded strategy for security concerns for a considerable amount of time (C. H. According to Zwolksi (2018), strategies and policies related to its security, which include conflict-prevention, reflect this commitment to security with a variety of measures in response to growing threats. However, because some of the issues and dimensions that the EU deals with are depoliticized, mainstream traditionalist and military-focused perspectives in the literature tend to ignore this focus (Kirchner,

2006). Firstly, it ignores the normative power that the union has and actively employs to shape and form its relationships, interactions, and practices with the "others," as Diez (2005) explains. This has implications for how the EU is viewed as a security actor, including the reasons why many do not think of it as such or believe it does not fit into the usual structure or category of them.

With an emphasis on threat perception and the processes of securitization, politicization, and depoliticization, a second major body of literature interpretively examines the development of the EU's construction of the Mediterranean. These discourse-based productions and constructions are examined closely in Cebeci and Schumacher's (2017) publications and works. By means of their research, they unveil the ways in which the European Union integrates normative, ideational, and geopolitical factors concerning its identity in relation to the Mediterranean region when formulating its speech act, procedures, and foreign policy (C. G. Hansen, 2006) that attempt to both further reproduce or reinforce its underlying self-other rhetoric and capture it. This clarifies the securitization, politicization, prioritization, and concerning sense of exceptionality with which some issues—like immigration, energy security, and the spread of extremism—are treated (C. G. Huysmans, 2004), while some are normalized and taken out of the political sphere, such as the urgent socioeconomic problems and needs of Mediterraneans.

A third body of literature discusses how the most recent version of the ENP (2015) and the EU Global strategy that followed marked a change in the way the EU constructed itself as a security actor. This is demonstrated by a number of studies that show how the EU adopted a stabilization strategy that gave security a higher priority than democratization as a result of its worries about the security implications of the Arab uprisings (. H. Isaac, 2018). Most of this thread aligns with earlier research on the EU security-democracy conundrum in the Mediterranean (European Commission, 1985, p. 2) as well as the 1990s onwards, when securitized reading and comprehension of the Mediterranean region began (Bicchi

2007, pp. 73-70). A body of research pertaining to this establishes a connection between the latest evolution of the European Union's defense architecture and the security measures that have been implemented in the region and elsewhere. A securitized outlook and approach toward the Mediterranean have been developed as a result of these, including prior practices and allusions to security concerns (C. H. In 2017, Cebeci and Schumacher.

This study examines how the EU's identity formation discourse as a security actor after 2015 has affected its perception of threats, security concerns, and practices. It does so by focusing on the new elements, region-drawing practices, and threats included in the Global strategy, as well as the methods the EU uses to reinforce and advance its discourse supported by othering practices. The analysis is based on the connections between the aforementioned strands and the material and ideational components or dimensions of the EU securitization process.

Theoretical Framework:

This study employs a critical constructivist analytical framework to examine the discursive context and narratives that underpin the ongoing and dynamic construction of European identity as well as the regional mapping and portrayal of the Mediterranean other. In order to investigate the intricate relationships between identity formation, policy formulation, and securitization, this dissertation draws on Bourdieu's field theory and the concept of habitus, which enhance discursive analysis. It does this by closely examining the speech acts and ideational structures that the EU uses as a security actor to frame, politicize, and depoliticize security, interests, and threats that are reflected in its policy objectives and practices.

Conceptual Framework:

Drawing upon the conceptual relevance and solidity of the EU as a security actor, securitization, and Bourdieu's field/habitus, along with the fundamental, theoretical, and substantive interconnections among them, this study's conceptual

framework assembles the underlying correlation that directs the discussion. According to Weaver's (1998) conceptualization, the securitizing agent framing referent objects as being legitimately entitled to survive because they are facing an existential threat and require security is a constitutive role. As seen by the texts and documents that have been made public, which both redraw surrounding spaces and present challenges as threats, this is especially the case with the EU.

The European Union's (EU) role as a security actor and the securitization process that accompanied the active production and exercise of its regional influence and the power its image wields have come into sharper focus after a protracted period and process of European integration and expansion in the region. Meanings, identities, and social relations generated and regenerated by practice are thus understood in part through this operationalized sequence of discursive and representational transformations and divergences. The problematization and dramatization of the issue or act in question through discourse and speech acts of securitizing agents (C.) is a crucial step in this process, according to Weaver (2004) and the Copenhagen school's security framework. These processes are embedded with concepts of politicization and depoliticization. G. Austin, 1975), as well as the examination of the environment in which the securitizing move is being explained to the audience (Buzan et al. 1998, pp. 26-30).

Given the dispositions that were shaped by the interactions, experiences, and perceptions that have accumulated between the EU and the Mediterranean, Field/Habitus holds great significance in this regard as it looks at perceived threats and policy practices. With the aid of practices and procedures meant to perpetuate identities within a particular (stratified) social context or order, Bourdieu's toolkit offers insight into the ways in which power and actor conduct are exercised and evident. Since social positions specific to a field are internalized, reinforced, and strengthened, the theory plays a crucial role in helping to understand practices.

Methodology and Methods:

In order to identify patterns and shifts in the EU's discourse as a developing security actor, the methodology of this study includes the critical discourse analysis of primary EU documents, statements, and media releases regarding the securitization of the Mediterranean issued after 2015. Particular focus is placed on the language, definitions, and meanings associated with the Mediterranean that are entrenched in security and follow the evolving threat construction and perception of the European Union. In order to target and trace the evolution of the EU discourse, the study also makes use of a variety of secondary sources and previously conducted interviews. Additionally, through policy practices related to security in the Mediterranean region, Bourdieu's Habitus/field is used to critically examine processes of norm-constitution, representation, and role-assignment.

The EU's Discourse-Production as a Security Actor in the Mediterranean: Continuities and shifts Since 2015

The European Union (EU)'s perception of the Mediterranean has shifted dramatically in recent decades. The Mediterranean, as a socially built and linguistically structured region, has been susceptible to numerous variations in Eurocentric discourse, evolving attitudes, and policy initiatives. The spatial and intellectual (pre)conceptions and frameworks have mirrored and continue to mirror Europe's desired gains and objectives, shaping the broader discourse and mapping of the Mediterranean region. As a result, the EU's narrative has remained malleable, allowing the EU to modify its interests, security objectives, threat perceptions, and strengthen its position and identity in a manner judged acceptable and relevant to the circumstances.

It is reasonable to assume that each stage of the EU's historical development and transformation into a security actor displayed unequivocal indicators, manifestations, and characteristics of securitization. As will be described more in

the following sections, these forces had a significant influence in establishing and defining the EU's character. Due to their discursively produced severity and seriousness, political crises are initially framed, projected, and depicted as urgent, crucial, and severe security apprehensions requiring quick reactions and decisive acts. Security is a product of actions and behaviors displayed by players, according to Alexander Wendt's (1992) perspective and conceptualization of the international system (Buzan & Waeber, 2003, p. 48), in essence, security is determined by what "states make of it". Security players do not arbitrarily designate or classify a situation as a threat. Rather, the relationships, power dynamics, interactions, interrelated interests, and security concerns among people influence their security perceptions and judgements and subsequent decisions and positioning in the international system. As a result, security actors frequently see threats as coming from other referent objects that they represent and act on behalf of.

First and foremost—entities such as nations, organizations, or individuals confronting existential threats and expressing a legitimate claim to survival. Second, there are the Securitizing Actors, which are entities or individuals with the power and capacity to identify issues and challenges as imminent risks to these referent objects, spiraling them to problems necessitating measures of extreme severity. Third, the role of Functional Actors, which are institutions or individuals who have influence over security decisions and sector dynamics but lack direct authority to securitize matters is examined. Finally, challenges or issues that threaten the very survival of the referent objects and require urgent and unprecedented action to deal with and eliminate the dangers that they carry. Integrating these key elements into security analysis provides us with an in-depth knowledge and holistic view of the security environment, allowing for more effective threat estimation and detection and planned countermeasure execution.

This process is typically referred to as the securitization process, in which the "securitizing actor" diligently frames the situation in question as an imminent threat

to the referent object's own survival and vitality. In simpler terms, this entails employing a specific language and vocabulary to proclaim and define the referent object, that whose wellbeing is recognized or believed to be in jeopardy as it is facing an existential threat that requires immediate elimination through exceptional procedures and action (C.F. Waever, 1995; Buzan, Waever, and De Wilde, 1998). In order to do this, the security grammar and rhetoric structures must be altered to accentuate and amplify the enormity and magnitude of the present crisis.

According to Waever, the generated or constructed account or rhetoric must communicate a profound and intense sense of apprehension and tension elevating the issues above the sphere of normality and into the domains of abnormality and deviation from normal, emphasizing their transition from ordinary worries to immediate existential threats and dangers. This transformation is complemented with specific lexical or spoken communication, as well as prompt security and policy decisions. In this sense, the referent object can be personified and manifested in a broad spectrum of issues such as national security, identity, territorial integrity, and practically any risk or threat of any type that is regarded and depicted as aberrant and existentially dangerous.

By way of illustration, structuring problem areas such as immigration, impoverishment, destitution, and degradation of the environment as fundamental dangers and risks to national security lifts them from a typical and minute concern to an urgent one necessitating a rigorous and instantaneous adoption of extraordinary measures of security that would have been unthinkable otherwise and under "ordinary circumstances." Finally, Securitization theory proposes that events are not fundamentally dangerous; rather, they rhetorically and constructively obtain the character of dangers by being labelled as "security" issues. This endorsement is demonstrated in and by the enactment of exceptional

measures, or the likelihood that such methods will be viewed and accepted as both necessary and valid.

Bourdieu's ideas of "field" and "habitus" are particularly important. They form an insightful lens through which a complete investigation of dialectically interconnected interactions, discourse-production, dissemination, and communication is possible. A thorough and stringent scholarly examination of these developments is required to gain an understanding of the most up-to-date and latest breakthroughs in EU policy and the construction of the Mediterranean. Accordingly, a systematic and recurring sequence of forming one's identity and production of meaning, when taking into account the various and mutually consolidating types of capital—both material and symbolic possessed and eventually matriculated, greatly facilitates and adds to the solidification of historical, present-day, and possible future discourses, moves and actions.

It is vital to emphasize that this multilayered practice relies mainly on the integration of previous conceptions, accounts, and narratives within as well as outside of the EU, intertwined with ideologically constructed roots. As an outcome, fertile soil has been cultivated for the development, widespread endorsement and transmission, and adoption of mutually reinforcing particular metaphors, perspectives, and identities. In a nutshell, these linguistic elements use facts at hand, anxieties, and conditions in order to reinforce classifications, both concealed and upfront interpretations and meanings, and to increase, broaden and increasingly validate the EU's role in relation to the discursively positioned other on the other end of the spectrum.

Similarly, hegemonic security discourses emerge from the interaction of the aforementioned variables in this environment. The Copenhagen school's Securitization theory places a significant value on the effect of interaction on, as well as the underlying nature of power relations between, the securitizing actor and the audience. In simple terms, their recursive and in sync engagement develops

and takes shape inside an individualized social, extremely organized and segmented space known as the "field", that ultimately results in the organization, generation, acceptance, and consolidation of ideas, values, standards, and principles, according to Bourdieu. In another composition, acting within a particular social environment or setting, dialectical social structures and behaviors contribute to the reproduction of identities, enabling presentation, declaration, and vocalization of the actor's status, power, and conduct of actors as outlined in Bourdieu's theoretical framework.

According to Weaver (2004) and the Copenhagen school's framework of security (Buzan et al 1998, pp. 26-3), the multidimensional problematization and dramatization of the issue or activity in question via language usage and verbal actions of securitizing agents (C.F. Austin, 1975), alongside the examination of the environment in which securitizing moves are conveyed or expressed to audience(s), are critical to this system. It is plausible, in this respect, to provide a useful analytical instrument for comprehending the complex connection between self-identity, inclinations, and patterns of conduct by applying Bourdieu's field/habitus theory. This paradigm can be leveraged to carefully explore the fundamental forces impacting the EU's view and behaviors as a security actor in the Mediterranean.

In this regard, European Union practises and narratives are often considered or perceived as being built by and producing and generating a continuous system of identity reinforcement, danger, and value characterization and categorization (C.F. Buzan and Waever 1998, 2003, Waever 2004). consequently, threats cannot be separated or comprehended independently from the larger contexts of securitization, social and political issues and history, as well as the constants and changes that are necessary for the appropriate identification and evaluation of threats. Identity and perceptions of danger are constructed and sculpted into the language-based, literary, and declarative practises applied and utilised by the

securitizing agent within an institutionalised or legitimate environment or atmosphere, according to reflectivist and critical discourse academic analysis (Bourdieu, 1991, pp. 105-16).

The evolution of dominant and alienation patterns has been and remains key for creating the EU's identity. This process necessitates the continuous propagation of preexisting divisions and categorical opposites, which have a (de)constructive impact on power dynamic and perceived identities, functional structures of authority, uniformity collective behavior. and shared solidarity, cycles of separation and integration, similarity and divergence. Such binaries have to be present for and around the notion or understanding of "otherness" leading to in the development and consolidation of what is called "the self," the balance of power, and the precise setting in which practices of securitization unfold.

These opposing ideas and concepts are constantly employed to legitimize the EU's position and involvement in the Mediterranean, enabling it to effectively communicate its priorities and ambitions using a specific lens. These depictions and prescriptive structures generate a sense of identity, distinctiveness, and individuality in connection to the "others and foreigners" both ideologically and geographically. This is to suggest that the EU's strength or influence is in its capacity to describe and authenticate its essential and fundamental beliefs and ideals outside its territorial limits through discursively constructed policy acts (Scheipers and Sicurell, 2007, p.435).

The characterization of the Mediterranean as a hazardous dangerous, and a war-torn space fosters the previously discussed juxtaposition, that seeks to strengthen the EU's stance and function as a security actor in relation to the contentious and turbulent Mediterranean "plagued" with terrorism and violence (European External Action 2016, p. 9,13), which is additionally represented as a focal point or junction for turmoil, illicit activities, religious extremism, across borders or worldwide This is particularly pertinent in light of the 2016 EU Global Strategy (EGS), which, as

opposed to those before it, specifically defines and characterizes the EU as a security player. The flexibility, or adaptability, of the EU's techniques to take into account the mutually dependent interaction between rhetoric and practice is most exhibited and demonstrated by the developing language and logic underlying the EU's enlargement project. Its mission is defined by an (In)security-driven approach to an ever-shifting security context, with an emphasis on hybrid and unconventional warfare, terrorist activity, energy security, and economic fragility.

To put it more simply, it suggests or implies a greater elongation and expansion of the EU's strategy and style of operation, as outlined in the EU Global Strategy (2016), by means of collaboration and shared enhancement of the "stability, strength, and resilience" of its closest neighbours or "neighbouring southern borders" (Lannon, 2017, p. 213). In this case, the European Union's security focus, actorness, and function can be considered to be linked to the durability and stability that no one but the EU may provide or offer to the fragile and hazardous areas it is encircled and endangered by. Federica Mogherini, the former High Representative of the Union for Foreign Affairs and Security Policy, made the following comment. She stated in 2016 that the security climate has indeed changed Federica Mogherini, the former High Representative of the Union for Foreign Affairs and Security Policy, made the following comment. She highlighted in 2016 that the security landscape has indeed seen many significant shifts, among them the "rise of hybrid threats on EU's borders," which explains reason why she urged the "EU to adapt and increase its capacities as a security provider" considering the strong connection "between internal and external security," which she believes must be "strengthened."

To safeguard itself and its constituents, the EU embarked on a self-assigned mission of patrolling and protecting the Mediterranean, which is incapable of progressing and ushering change on its own. In general this new security

vocabulary and component replicates the arc of events that characterizes EU-Mediterranean bilateral ties. As has been indicated, it emphasises a rather heightened sense of priority and necessity when confronted with challenges and dangers such as "hybrid threats," "cyber security," "terrorism and radicalization" (European External Action Service, 2016, pp. 9-13). "smuggling and trafficking," "irregular migration flows," and "arms trafficking and organized crime" (Council of the European Union, 2016) are all concerns and challenges posed by the vulnerable and defenseless Mediterranean other, which must be addressed and eradicated by the more powerful and greater in strength.

As stated by Cebeci and Schumacher (2017), the EU's plan to separate and isolate itself from the regressive and problematic Mediterranean other with which it has no shared characteristics can be traced to its desire to have clear and well-defined boundaries. This is the motivation for the EU's considerable modification in its locutionary act. Bearing this into consideration, it is critical to emphasise that the EU prioritised its own safety and well-being over all else in this policy.

It is vital to emphasize that the previously mentioned presentation of the Mediterranean is not unique or novel. This type of narrative perpetuates what Bilgin (2009) refers to as a "double discourse". This dichotomy has always been a key component or aspect of EU propaganda. Simply put, the EU employs a dual discourse to promote its position in the Mediterranean. It has been quite tenacious in portraying itself as an actor with security responsibilities as well as a developmental ones, with features, obligations and duties that overlap in both categories. This accords well with the EU's self-perception as a "leading force for diplomacy, cooperation, and compromise" (Council of The European Union, 2016, p. 5) especially with respect to the Mediterranean, which on the one hand portrays it as fragile, insecure, and dangerous while also portraying it as a domain that is vital to the EU.

This duality has been an ever-present subject in official European declarations and pronouncements. According to Bilgin and Haddadi (2004), dualism in EU discourse is an intricate interconnected system comprised of multiple opposing or conflicting goals such as democratic transformation, growth, and security.

This was apparent in how it sought to stress the link between security and development in the 2018 report. According to the European Union, it is part of a "joined up approach that ensures adequate linkages between security and defence to the Union's work in the fields of development, stabilisation and humanitarian aid". This is not the sole occasion that this relationship has been brought up or implied. In the same document, the EU provided millions of dollars in investments to countries bordering the EU and Africa aimed at encouraging "economic development, job creation, economic support, and giving people more opportunities in their home countries - thus ensuring social benefits." The ultimate goal is to "eradicate poverty" and achieve the 2030 Agenda as part of "The New European Development Consensus," which recognises "the link between security, migration, climate change, and humanitarian action." (External Action of the European Union, 2018).

The traditional perspective and frame persist in 2019. The Middle East and North Africa are still viewed as "fragmented" and ripped apart by "rivalry" and "conflict," which is why the EU has been proactive in a procedure of expanding its "partnerships with all countries of the region, with regional organisations such as the League of Arab States, the countries of the Gulf Cooperation Council, and the Organisation of Islamic Cooperation (OIC), as well as encouraged dialogue between regional adversaries" (European Union External Action, 2019). While the EU's discourse of the Mediterranean has changed slightly with respect to the manner in which the "region" is both geographically and socially constituted, it is apparent that the Mediterranean remains an optimal location for lengthy and protracted wars, threats, and violence. This substantiates the notion that the whole

discourse never truly diverges from its basic assertion, which has been featured and reintegrated in threat-definition and verification, as well as the linguistic and ideologically-based development of EU-Mediterranean relations.

In 2022, during an address at the European Diplomatic Academy in Bruges, Belgium, Josep Borell, the European Union's High Representative for Foreign Affairs and Security Policy, contrasted the continent of Europe to a "garden" tended by "gardeners", while the overwhelming majority of the remainder of world's population and countries is a "jungle". "We have built a garden, and everything works," he said of Europe. "It is the best combination of political freedom, economic prosperity, and social cohesion that humankind has been able to build-the three things together. The jungle could invade the garden. The gardeners should take care of it, but they will not protect the garden by building walls. A nice small garden surrounded by high walls in order to prevent the jungle from coming in is not going to be a solution. Because the jungle has a strong growth capacity, and the wall will never be high enough in order to protect the garden. The gardeners have to go to the jungle," Borrell continues. Otherwise, the rest of the world will assault us in various ways and means" (European Diplomatic Academy: Opening remarks by high representative Josep Borrell at the pilot program's launch, 2022). This speech is the pinnacle of the inside/outside discursive dichotomy that continues to-date to shape the EU's identity and interactions with the Mediterranean.

As a result, securitization is an essential and effective means of the act of isolation and othering. The depiction of the Mediterranean as an unstable region where tensions and challenges thrive has a character element since it delineates geographical and abstract parameters between a secure environment within and a perilous exterior. The logics of exception, regularization, and stigmatization or problematization pervade the literature on securitization. The process of establishing and integrating a problematized theme inside a security structure

which calls for rapid and swift responses and action is the initial step. As a result of this increased sense of immediacy and the idea of exceptionalism unusual measures were implemented (Bourbeau, 2014, p. 2). Therefore, present securitized issues exist (Does, 2013). This is primarily why the conceptual base remains the foundation around which the entire process of securitization hinge.

The Copenhagen School's analytical approach (Waever 1995; Buzan et al. 1998) is based on the concepts of discursive abnormality and exceptionalism (Hansen, 2011). In other words, labelling or categorizing a situation as a security concern or threat generates an atmosphere of seriousness and intensity that validates the use of extraordinary measures that fall outside the domain or range of conventional and typical politics. An environment of uniqueness and dread must be retained in order to properly justify security-driven policies.

From this perspective, securitization could be defined as a performance-based process that includes mutually indispensable and productive components that strengthen their relationship to one another through the ongoing development of positions and identities within a particular social (ranked) succession or setting in which actors' influence and actions are mobilized and displayed through individual decisions and choices, policies, and responses. Bourdieu's toolkit bridges the theoretical and practical interactions among the EU as a security performer, the processes of securitization, and depiction and image of the Mediterranean as a breeding ground for dangers, instability and chaos.

According to Weaver's (1998) argument, the securitizing agent plays a critical role in framing referent objects as facing a crisis of existence, requiring security and safety, and so having a legitimate right to survival. These tendencies feed on and into existing structures. They could be defined as the remnants of earlier politicized problems. In other words, they already form elements of the wider official discourse. As an outcome, present securitized matters exist (Does, 2013). This is

primarily why the conceptual base remains the foundation upon which all actions of securitization rest.

Findings

By way of conclusion, it may be argued that the EU typically employs two primary narratives to construct the Mediterranean. That is, the EU has consistently perceived or depicted the Mediterranean "as the threatening, problematic, and dangerous other," as well as a territory in which the EU's interests are located and are properly and strategically dealt with as such. Such structures essentially aid in the re(generation) and fortification of the EU's and the Mediterranean's identities. As pointed out earlier, the EU's policies with regard to the Mediterranean are characterized by a general predisposition or drive to uphold its own safety and security, which reveals considerable consistency in the EU's strategy and overall viewpoint. Upon initial inspection, it seems as though the EU has substantially altered its standpoint and approach, but upon careful examination, it becomes rather clear that it has continued functioning within the same discursive confines that has guided it well in the past.

The morally better, superlative, matchless, and distinct image that the EU constructed for itself and continues to maintain produced a favorable atmosphere for the security-oriented function and position that it adopted in the Mediterranean. The characterization and presentation of the bordering south's vulnerability and life-threatening fragility as an immediate danger to the EU's customary security and stability seems to have prompted or precipitated an alteration in the EU's lexicon with an obvious transition from hopes of possible relationship building and cooperation to securitization. As a consequence, a security-driven strategy was devised to reflect the EU's present perspective and aims. As stated previously, the EU strives to construct or maintain distinct and unequivocal borders so as to insulate and remove itself from the troublesome, impoverished Mediterranean counterpart with which it has no shared characteristics. This objective appears in

the EU's security actions, which are based on an overlapping rhetoric of the more prosperous and developed EU offering security and development to the less developed and agitated Mediterranean. The latter's stability and safety are critical to the first's. That is, without them, the first's would be jeopardized.

The European Union (EU) has strategically used meticulously constructed narratives and discourses to shape its policy choices and military operations in the Mediterranean, particularly in the post-2015 era, in a landscape or backdrop characterized by the complex interaction of ideology, security discourses, practices, and securitization. The artful framing of issues as existential threats to the EU's very own survival has been central to this strategy. This narrative stance is based on the Copenhagen School framework, stressing speech acts as well as existing linguistic features and notions, all of which served important roles in establishing and maintaining images and risks.

Since 2015, the EU's presence and involvement in the Mediterranean have been based on the belief that the EU's security is inextricably linked to the stability of the Mediterranean region. The EU has attempted to legitimize its role as a proactive security actor in the Mediterranean by framing difficulties as existential dangers. In doing so, the EU has sought to strengthen not only its own position, but also the resilience of the Mediterranean itself. According to securitization theory, the security and stability of the Mediterranean are intrinsically related to the EU's own well-being, according to the EU's manufactured narratives.

The EU's Mediterranean posture is multidimensional, encompassing more than just military actions. It is a case study of how the EU, under of the Copenhagen School's framework, methodically builds its narratives and utilizes practices that portray it as the region's normatively superior power. The EU aspires to be a civilizational crossroads, with the Mediterranean presented as a "inferior other" in need of leadership and assistance. This practice is consistent with Bourdieu's

concept of the field/habitus, in which the EU establishes its power in the region as a norm-setter and defender of democratic and humanitarian values.

The EU has been able to exploit securitization processes by carefully building narratives that regard the Mediterranean's security as critical to its own survival. The EU has been able to legitimize its presence in the Mediterranean by carefully building narratives that regard the security of the Mediterranean as critical to its own survival. The Mediterranean has become an important location for the EU to promote and sustain its status as a regional and normative force. In this setting, the EU's strategic maneuvering demonstrates how a supranational institution may construct its identity, establish its influence, and position itself as a critical actor in a complex regional security landscape by leveraging discourses, practices, and securitization.

As the EU proceeds to play an integral part in the Mediterranean region, a detailed investigation of these manufactured narratives, discourses, and practices will continue to be critical when considering its evolving security policies and its effort to strengthen both its own safety and the peace and security of the Mediterranean region. This strategic approach will not only have an impact on the EU's involvement in the Mediterranean, but it will also serve as a relevant case in modern international peace and security governance.

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Saudi Arabia's Foreign Policy Post the Arab Uprisings: An Analysis of The Saudi- Egyptian Partnership (2011-2016)

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Abstract:

The Arab uprisings of 2011 came as a “shock” for international and regional geo-strategic players, including the Gulf. The Saudi regime, in particular, had fears of the so-called “domino effect”. This prompted the gulf country to adopt new methods in its foreign policy, employing both soft and hard power measures either to contain the uprisings through direct military intervention and other soft power measures, which include greater financial flows to pro-gulf regimes, or to support regime change in cases of historical antagonism with regimes in Syria and Libya. Nevertheless, the downfall of Mubarak’s regime in particular constituted a threat to the gulf stability.

There were fears of a potential expansion of Egyptian relations with Iran, Qatar, and Islamic opposition groups in Saudi Arabia under Morsi’s regime. Nevertheless, whilst the rise of al- Sisi in Egypt was welcomed in Saudi Arabia, their bilateral relations witnessed periods of tensions as well. The so-called “Egypt First” doctrine developed by al-Sisi stresses the importance of Egypt’s security landscape and domestic stability, avoiding the country’s enduement in broader regional conflicts, including in Yemen and Syria where Saudi Arabia has greater presence. The aim of this paper is to critically examine Saudi Arabia’s foreign policy after 2011, focusing on the areas of convergence and divergence in the Saudi- Egyptian interests (2011-2016). The study uses Complex Realism, a theory developed to understand the particularities of Third world countries’ foreign policies. It moves beyond the redundancy of foreign policy analysis. Instead of relying on psychological explanations that fail to admit the importance of the context itself or the

structural explanations that neglect the role of the agency, the theory explains how the agency seizes the opportunities from the structure to develop a foreign policy based on “regime survival”.

Introduction

The 2011 Arab uprisings that swept the Middle East and North Africa (MENA) region created prolonged repercussions that are not just confined to the rise of terrorism and Islamic militancy, the outbreak of refugees’ crisis, and the intensification of the Sunni-Shiaa schism, but also affected how the inter-Arab relations are orchestrated (Gaub, 2015, p.1). The regional environment faced multiple shocks, ranging from the downfall of veteran regimes, including Hosni Mubarak of Egypt and the rise of Islamists as competing political forces, to the persistence of authoritarian regimes, including Bashar al-Assad of Syria (Gaub, 2015, p.1).

The Gulf, a region where protests are uncommon, witnessed an unprecedented shock amid fears of the so-called ‘spillover’ effects. Saudi Arabia quelled the uprisings in Bahrain, Egypt and Tunisia, while supported the anti-regime forces in Syria and Libya, employing both soft and hard power measures to ensure its survival. Nevertheless, the most important shock was manifested in how ‘historical allies’ like Saudi Arabia and Egypt would manage their relationship after 2011, particularly when Islamists rose to power. Therefore, Egypt was dragged as a top priority on Saudi Arabia’s regional policy.

Pragmatically speaking, Saudi Arabia and Egypt have always been “friends in need”. Their shared security approach, including the combat of Islamism and Jihadism in exchange for financial assistance have defined their cooperation for decades (Piazza, 2018, p.2). Nonetheless, their relationship witnessed periods of divergent interests as well. During Nasser’s era, Saudi Arabia and Egypt relations witnessed strains, as the latter supported a Pan-Arabism agenda and a Socialist outlook (Arafat, 2019, p.14). Conversely, during President Anwar al-Sadat’s reign,

Saudi Arabia and Egypt relations improved, as the latter lessened its relationship with Russia and cooperated with the US and Saudi Arabia instead. Nevertheless, this was short lived as Egypt sought to sign a peace treaty with Israel. In Mubarak's era, the Saudi-Egyptian relations reached their peak. Egypt's foreign policy objectives converged with that of Saudi Arabia, the West and Israel, with its support for the 'liberation' of Kuwait, sending 35,000 Egyptians under the Arab Mutual Defense pact of the 1950s (Arafat, 2019, p.15).

In this sense, the downfall of the Mubarak regime constituted a direct threat to this prolonged relationship that flourished under Mubarak's reign. Saudi fears soared as Islamists in Saudi Arabia supported the rise of the Muslim Brotherhood (MB) in Egypt, while Iran sought to bring Egypt into its orbit of influence, endangering the prolonged moderate camp that stood as a bulwark against the Iranian axis of resistance. Nonetheless, while the rise of al-Sisi to power constituted the best scenario for Saudi Arabia, al-Sisi's regime was able to strike a balance between upholding its relations with its Saudi counterpart, while avoiding getting dragged in regional conflicts: Syria and Yemen, where Saudi Arabia had greater presence in.

The aim of this paper is to examine the key determinants of the Saudi-Egyptian partnership (2011-16), using a new theoretical framework that seeks to examine how 'regime survival' has pushed the two countries to cooperate, and sometimes, diverge in regional files.

The paper employs the cases of Egypt and Saudi Arabia after 2011 for two main reasons. First, Saudi Arabia and Egypt are two key regional players, which shaped the politics of the MENA region for several decades. Egypt played a significant role in shaping the dynamics of the Middle East. This includes its role in the 1948 war, its Pan-Arabism agenda under Nasser that stood in strike difference from the US, Israel and Saudi Arabia, and its central mediation efforts in the Palestinian-Israeli conflict. Saudi Arabia, on the other hand, is the leader of the Islamic world, a major oil producer, and an active player in the politics of the MENA region. Second, the uprisings of 2011 and their repercussions on the

global community, including the MENA region, constitute significant context through which the patterns of between Egypt and its Gulf ally could be analyzed.

To understand the determinants of the Saudi-Egyptian partnership, the theory of Complex Realism is used. Complex Realism is an integrative theory that seeks to explain how the MENA states formulate their foreign policies through external-internal calculations of threats, based on omni-balancing calculations. Given the particularities of the MENA region and the importance of domestic settings in foreign policy, Omni-balancing examines how the threat perception of MENA regimes is expanded to include internal threats, too. Given the importance of the theory, a full section will be dedicated to discussing it.

The paper argues that regime survival was a key determinant that characterized the degree of exclusivity of the Egyptian-Saudi partnership (2011-2016). Under Morsi and al-Sisi, Egypt maintained a non-exclusive partnership with Saudi Arabia. Whilst Morsi sought to uphold the money-for-security partnership, the growing mistrust between Egypt and the Kingdom pushed the former into the Qatari-Turkish orbit of influence. For al-Sisi, his rise constituted the optimal scenario for Saudi Arabia, yet their partnership failed to materialize into an unconditional support when the interests of both regimes diverged.

The paper is divided into three sections. The first section highlights the main assumptions of Complex Realism with its three environments. The second section applies Complex Realism on the case of Egypt-Saudi partnership (2011-2013), while the third section utilizes the theory to explain the key determinants of the Saudi -Egyptian partnership (2014-2016), focusing on al-Sisi's 'Egypt First Doctrine'.

Complex Realism:

The so-called 'Area Studies' have always been at the center of debate in the IR field, with arguments and counterarguments on the applicability of universal or area-oriented theoretical analysis (Hurrell, 2020, p.191). The first round of the

debate was in the 1960s, particularly after the outbreak of the Cold war, as global attention shifted towards the Middle East, with the intensified schism between the US and the USSR in the region. The second round of the debate took place in the 1990s, when mainstream IR theorists stressed the importance of universality in explaining the interactions between states, excluding the experiences of the Middle East. The second round of the debate reflected, therefore, the vision of the Western-centric perspective that prioritized the study of the First World countries, to develop universal theories, with a belief that IR is based on the 'Great Powers'. From the 1990s onwards, mainstream theorists, including Hans Morgenthau and Kenneth Waltz had conveyed a simple message: IR was, and still is, about the major states and their experiences (Hurell, 2020, p.191).

The balance of power theory reflects this Western-Centric assumption. Security is defined, according to this theoretical strand, as the immunity of states to external shocks. Whilst this argument is largely applicable to the situation of great and superpowers, it fails to explain how the threat perception of MENA states is stretched to include internal threats, too. The internal dynamics of the states of the MENA region are different from those of the great powers. This difference was an outcome of the historical particularities of the MENA states, ranging from histories of penetration and imposed artificial borders, to weak state-society relationship and the rise of regimes with force. Each state has witnessed its own historical path and challenges, but they all are aware of the importance of internal threats, particularly threats to regime survival in their foreign policy conduct. In examining the foreign policies of Middle Eastern states, several theorists fell into the trap of reducing the entire foreign policy to either psychological factors (the role of the leader) or overemphasized the structural factors, failing to understand the interplay between the agency and the structure. Scholars such as David Byman argue that the politics of the region is based on the agenda, perceptions, and ambitions of its leaders, overemphasizing the role of psychological factors (Byman, 2005, p.59). While structuralists emphasize, on the other hand, the role of the

context, they fail to examine why countries could act differently under the same structural constraints. Take the case of Qatar, a small country that made foreign policy decisions in contradiction with its position in the global system.

The theory of Complex Realism examines this interplay between external-internal dynamics that has defined the foreign policies of the MENA states, with one major driver: regime survival (Hinnebusch & Ehteshami, p.225. 2013). Complex Realism adopts what can be described as an 'integrative approach'. It came as a response to the redundancy of the three traditional levels of analysis in foreign policy: state, regional, and international levels. It explains how the three levels constitute a part of totality. This is not to fall in general and broad explanations, however. Complex Realism does not deal with each environment as a separate sphere of influence. Instead, it explains how the interplay between both the agency and the structure is reflected in the foreign policy of the state. Hence, instead of reducing the entire analysis of the foreign policies of the MENA states to either individual factors or structural and international factors, Complex Realism studies the interaction between both, with a key determinant of MENA states' foreign policies: regime persistence.

The first environment is the global environment. Such an environment is not characterized by anarchy as mainstreams theorists argue, but rather what best defines it is 'hierarchy' (Hinnebusch & Ehteshami, 2013, p.226). In such an environment that is characterized by a hierarchical order, the MENA states were historically placed at what can be called the 'peripheral position' (Selim, 2020, p.4). This was an outcome of a plethora of interventions and penetrations sponsored by major powers, ranging from the European colonization up to the outbreak of the Cold war and the global schism between the United States and the ex-Soviet Union in the region (Ashley, 2012, p.1). After the end of the Cold war, the tool of penetration differed, however. They relied instead on the so-called American agenda of democratization to penetrate the MENA countries such as Iraq under the guise of promoting democracy. This type of interaction dominated the dynamics

of relations between the MENA states and the great powers, particularly the US, for decades. Nonetheless, this does not necessarily mean that structural constraints have defined the foreign policies of the MENA states. As mentioned above, Complex Realism does not overemphasize the role of the structure. Instead of dealing with regional states as passive recipients of transcending global events, Complex Realism examines how they seize opportunities to break away from patterns of dependency. From the perspective of Complex Realism, the polarity of the system could be a blessing or a curse. Under a unipolar system, states are obliged to follow the orders of the great power, whilst under a bi-polar and multi-polar systems, their chance of maneuvering is larger. They can diversify their relationships (Hinnebusch & Ehteshami, 2013, p.226). This can be the situation of the MENA states after 2011, particularly with the rise of China and Russia amid an intensifying American withdrawal.

Second is the 'anarchic' regional environment. In such an environment, the MENA states are exposed to a plethora of threats, ranging from transitional terrorism, sectarian conflicts, nuclear proliferation, among others (Hinnebusch & Ehteshami, 2013, p.26). Nevertheless, as mentioned earlier, not all regional states are passive recipients to what happens outside their borders. While small states are more likely to cooperate and seek the protection of the US, larger states are more likely to have greater regional aspirations, and may in certain instances, adopt an offensive strategy. It all depends on its strategic significance and the resources it has (Selim, 2016, p.5).

Third, the internal environment. In this environment, Complex Realism examines the internal dynamics of the state, which include its infrastructure, resources, military power, public opinion if relevant. Nevertheless, the key determinant of the internal dynamics is the threat perception of the regime and its interests. Here comes the role of 'Omni-balancing'. The respective regime calculates the costs and benefits at the three levels, using omni-balancing

calculations i.e., calculations of external-internal threats and opportunities. Omni-balancing builds on the balance of power theory, but expands its assumptions to include internal threats, too (David, 1991, p. 233; Mahmoud, 2019, p.52). Hence, the concept states that while Western regimes are more likely to be concerned with external threats, the regimes of the MENA region are more likely to be concerned with internal threats in their foreign policy conduct. As mentioned earlier, the historical line of the Third World countries and the internal dynamics of authoritarianism, rule by force and the weak state-society relationship place regime survival at the top of the states' foreign policy conduct. Hence, the theory is used to assess how regime survival was a key determinant in the Saudi-Egyptian partnership (2011-2016), highlighting how both countries dealt with opportunities and threats from the three environments.

Egyptian -Saudi partnership (2011-2012): Foreign Policy at the service of domestic politics

As mentioned earlier, the 2011 Arab uprisings exposed Saudi Arabia to multiple threats, ranging from the rise of Iran and the Islamists to the failure of the US to deal with the security landscape in the Middle East in the aftermath of the uprisings. The rise of Islamists in Egypt constituted the biggest blow for Saudi Arabia in particular. Relying on external-internal calculation of threats, Saudi Arabia knew that the rise of Islamists constituted an existential threat to the Saudi regime. Domestically, there were fears that the rise of Islamists to power would have a 'spillover effect' over the region, particularly in Saudi Arabia. Since the 1960s, Saudi Arabia has been a host for Islamists who fled from Nasser's Egypt and al-Assad's Syria. Whilst at the early 1960s up to the 1970ss, al-Sahwa movement, also known as the 'Islamic Awakening', the Muslim Brotherhood branch in Saudi Arabia, remained committed to social roles, they later started to criticize the regime (Arafat, 2019, p.16). The ideological vacuum that took place after the fall of Pan-Arabism was filled by Political Islam (Al-Rasheed, 2013, p.1). Saudis who were

dissatisfied by the Wahabi discourse found in the agenda of al-Sahwa a promising discourse (Al-Rasheed, 2013, p.1). As al-Sahwa flourished in Saudi Arabia, they started to call for political reforms and even criticized the American presence on the Saudi soil under the guise of liberating Kuwait, directly challenging the Saudi regime (Matthiesen, 2015, p.4). With the outbreak of the 2011 uprisings, they firmly supported the revolutions in Egypt and Tunisia, where the Islamists had electoral victories. Therefore, fears over the stability of the Saudi regime amid close connections between al-Sahwa and the Egyptian Muslim Brotherhood shaped the Kingdom's foreign policy towards Egypt under the Islamists.

Nonetheless, domestic factors were inseparable from regional and international dynamics. Regionally, Saudi Arabia had fears that the rise of Islamists to power would translate into an expanded Iranian-Egyptian relations. The 2011 protests in Egypt were perceived positively in the Iranian policy circles and were even described as part of an 'Islamic awakening'. The electoral victory of Islamists constituted—from the Saudi perspective—an advantage for Iran, as it believed that the rise of an alternative regime would not just open the door for expanded bilateral relations but offered a strategic advantage for Iran's influence in the region., too. Nonetheless, Saudi Arabia's fears were not confined to Iran's regional expansion, but also Qatar's ambitions as well (Arafat, 2019, p.16). Out of the total 6 Gulf Cooperation Council (GCC) members, Qatar was the only Gulf country that welcomed the rise of the Muslim Brotherhood. Saudi fears soar as Qatar seemed to exploit the uprisings to gain a foothold in the Middle East through an expanded relations with the Islamists. There were fears of Turkey's ambitions in Egypt, too. With the Turkish support to the Islamists in Egypt, there were concerns over the rise of a regional, independent camp of Saudi Arabia, led by the Islamists in Turkey, Qatar, Egypt, and to lesser degree in Tunisia.

Regional and domestic factors were inseparable from the overall international scene. The fall of Mubarak and the rise of the Islamists to power prompted the Saudi regime to reassess the US's security agenda in the Middle

East, with its failure to thwart the uprisings that brought down its major ally in the region: Mubarak. Whilst the fall of Mubarak created a ‘fuss’ in the Saudi American relations, the Obama administration was aware that the fall of the Egyptian veteran regime was inevitable. It was aware that the costs of a prolonged political instability would be hard to bear, as the US sought to adopt a ‘leading from behind’ agenda instead of having a direct military presence in the region. Regardless of the US justifications, Washington’s failure to act created a rift in the Saudi- American relationship, as the latter called for immediate ‘political transition’ instead of thwarting the uprisings. Such a rift in relations was reflected in the official discourse of the Kingdom. In 2013, the Saudi ambassador to London Mohamed Bin Nawaf wrote a New York Times article under the title of “Saudi Arabia will go it alone”, criticizing the US’s policies in the region and its failure to defend the Saudi interests, from Syria to Iran (Al-Saud, 2013).

In this context, Saudi Arabia’s foreign policy towards Egypt was an outcome of external-internal calculations of threats. First, it was aware of the direct repercussions of the rise of Islamists in Egypt on the domestic stability in the kingdom amid close connections between al-Sahwa and the MB in Egypt. Second, the Saudi distrust of the Islamic regime was coupled with fears of an expanded relations with its major regional foe: Iran. There were fears that the rise of Islamists amid an Iranian welcoming would translate into a strategic advantage for Tehran in the region. It feared getting trapped in a new regional environment characterized by an Iranian-Turkish- Egyptian security triangle. Third, these fears were coupled with the American decline and Obama’s ‘leading from behind’ policy that prioritized cautious engagements in the region instead of direct intervention to thwart the uprisings. Nevertheless, at the end, regime survival was a key determinant in explaining Saudi Arabia’s policy towards Egypt under Morsi’s regime.

Nonetheless, in contrary to the Saudi perceptions, Morsi’s regime failed to fundamentally reorient the entire Egyptian foreign policy, albeit with some alternations, which include the expansion of relations with Qatar and Turkey. Morsi

reassured the international community that Egypt would remain bound by international and regional treaties, including the Peace Treaty with Israel (Khawaja, 2013, p.49). He even welcomed the American foreign minister and the minister of defense in his very first month of presidency (Abdel-alti, 2013, p.88). The Egyptian foreign policy, at that time, aimed to serve domestic interests, particularly to keep the Egyptian economy alive. The EU and the US constituted around 50% of the total markets of Egypt's exports (Grimm&Roll, 2012, p.3).

Again, regime survival was a key determinant in Egypt's foreign policy towards Saudi Arabia. Using foreign policy for narrow domestic interest, Morsi's regime reassured Saudi Arabia that Egypt is not willing to 'export the revolution'. This was coupled with Morsi's first visit abroad as an Egyptian President to Saudi Arabia, in a move that aimed to reassure Saudi Arabia that Egypt was not willing to give up on its partnership with its Gulf partners. In a statement, Morsi said: "The stability of the region necessitates the stability of Egypt and the Gulf, especially Saudi Arabia" (France 24, 2012). Domestic concerns forced Morsi to adopt a 'Mubarak-like foreign policy' towards the Kingdom. Prominent IR scholar Dr. Gamal Selim argues: "Continuity rather than change dominated the post-Mubarak Egypt" (Selim, 2020, p.1). As Morsi assumed office in 2012, Egypt's economy was in trouble. Egypt's foreign reserves decreased to \$10 billion in 2010 (Chatham House, 2020, p.6). The number of Egyptian working migrants in Saudi Arabia soared to million and 650 thousand in 2012 (DW, 2012). In this context, Morsi could not risk losing his Gulf partners amid fears of the potential repercussions on the country's internal stability.

Regionally, the interests of Saudi Arabia and Egypt converged, particularly in Syria. The Egyptian regime proposed the formulation of a four-member committee, including Egypt, Saudi Arabia, Turkey and Iran to solve the Syrian crisis (Ezzat, 2012). Nevertheless, this initiative failed due to Saudi Arabia's protest over Iran's regional ambitions. Morsi even backed a proposal at the UN general assembly that supported a military intervention and the imposition of a no-fly zone

over Syria. The Egyptian regime supported the Syrian opposition, which included Saudi-backed factions. Nonetheless, the Saudi mistrust of Morsi's regime, pushed the latter closer to new regional competitors: Qatar and Turkey (Selim, 2020, p.15).

Whilst Morsi could not give up on his traditional Gulf partners given the dire economic situation he had to deal with, his partnership with Saudi Arabia was not exclusive. As Saudi fears of Morsi's policies soar, Qatar emerged as a new political and financial patron for Egypt. To deal with Egypt's declining foreign reserves, Qatar provided the regime with around 8 billion USD (Selim, 2022, p.15). In addition, Qatar's investment in Egypt reached 18 billion USD under Morsi (Selim, 2022, p.15). The financial support was coupled with political support. Meanwhile, the Qatari-owned broadcast '*Al-Jazeera*' supported Morsi's regime in several political occasions.

In short, 'regime survival' was a key determinant that shaped the degree of partnership between Saudi Arabia and Egypt (2011-2012). The non-exclusive partnership was an outcome of omni-balancing calculations from the Egyptian and Saudi parts. For Saudi Arabia, there were fears that close connections between al-Sahwa opposition group in Saudi Arabia and the Muslim Brotherhood in Egypt would open the door for the outbreak of protests in the Kingdom. Whilst regional and international factors shaped Saudi Arabia's foreign policy towards Egypt, particularly amid fears of growing relations with Iran, Qatar and Turkey and the failure of the US to act, it is 'regime survival' that was a key determinant for Saudi Arabia's foreign policy towards Egypt under Morsi.

From the Egyptian side, Morsi upheld his traditional partnership with Saudi Arabia as the Egyptian economy was reeling. Nonetheless, this partnership was not exclusive in nature. Whilst he kept the American Israeli-Egyptian security triangle, a prevailing sense of mistrust shaped his relations with Saudi Arabia regardless of his rhetorical reassurances of the centrality of the Gulf security. Given the economic dire situation in Egypt amid the rise of new regional competitors to Saudi Arabia, Egypt was pushed closer to Qatar and Turkey. From Morsi's

perspective, the expansion of regional alliances amid a dire economic situation would serve the survival of the regime. The regime sought, at that time, to use foreign policy for narrow political interests. Nevertheless, as a prevailing sense of mistrust shaped his relations with Egypt's traditional partner: Saudi Arabia, coupled with his close relations with Qatar and Turkey, Morsi failed to use his foreign policy to better serve the regime's interest: survival.

Egyptian- Saudi partnership (2014-2016):

In contrary to Saudi Arabia's response to the Islamists' rise, al-Sisi's accession to power was perceived positively in the Saudi policy circles. King Abdullah was among the first Arab leaders to send a congratulatory telegraph to President al-Sisi, stating that he "managed to save Egypt at this critical moment from a dark tunnel that only god can comprehend its dimensions and repercussions" (Zecchinelli, 2015, p.65). Such a political support was followed by huge investments and Saudi aid. In 2014, Saudi Arabia, the United Arab Emirates (UAE), and Qatar sent aid worth of 12 billion dollars to Egypt (Piazza, 2022, p.5). The following year, Saudi Arabi, Kuwait, and the UAE pledged additional 4 billion dollars to Egypt. Saudi Arabia's investments reached almost a billion, while the number of Saudi companies operating in Egypt reached 16 (Sadek& Al-Laban, 2018, p.43). Generally, the Gulf financial support for the Egyptian economy exceeded \$29 billion between 2013-2015 (Sharp, 2016, p.9).

Saudi Arabia's foreign policy towards al-Sisi's Egypt was an outcome of omni-balancing calculations, too. Saudi Arabi sought to reestablish the pre-revolution order in Egypt. This move was prompted by fears of the internal repercussions on Saudi Arabia's stability if the Muslim Brotherhood remained in office. Morsi's model of governance would have inspired the Saudi Islamists to call for radical reforms.

The Saudi-Egyptian regional interests converged, too. They shared the same concern of Qatar's regional policies, as it sought to expand its foothold in the Middle East. The anti-Qatari bloc, comprised of Egypt, Saudi Arabia and the UAE,

perceived Qatar as a regional foe that is too close to the Muslim Brotherhood and Turkey, and uses its media particularly *Al-Jazeera* to promote its regional policies (Selmi, Bouoiyour, 2020, p.2). They shared concerns of Turkey's regional policies as well. Besides its support for the Muslim Brotherhood, the Turkish regime spared no effort—from the Saudi and Egyptian perspectives—to challenge Egypt's internal stability. This was manifested in President Recep Tayyib Erdogan's calls for the imposition of sanctions on the Egyptian regime in 2013 (Siphrrz &Gaghaitay, 2015, p.1) Their shared concerns over Hamas were evident as well, as Saudi Arabia and Egypt perceived the movement as an extension of the Muslim Brotherhood. They shared the same goal of combating the rise of Jihadists in Sinai and Western Libya, too. In Libya, Saudi Arabia and Egypt had concerns over the persistence of violent groups on Libya's soil, particularly ISIS and Al-Qaeda.

Domestic and regional factors were inseparable from the overall international dynamics. Saudi Arabia's unprecedented support for the Egyptian regime came as the US failed to deal with the security landscape after the outbreak of the uprisings. This was coupled with its criticism of the human rights situation in Egypt, cut off the partial military aid to Egypt, and suspension of the delivery of F-16 jets (Al-Ged, 2017, p.87). Per the Saudi perspective, the US failed to defend its major allies in the region, namely Mubarak, and even got closer to the Muslim Brotherhood. Hence, it had to 'step in' to defend its new ally in Egypt.

Nonetheless, the Saudi-Egyptian partnership was not exclusive. Whilst their interests converged in combating jihadists and Islamists in the region, President al-Sisi avoided Egypt's involvement in the prolonged Sunni-Shiaa schism that, pragmatically speaking, would have dragged Egypt into unnecessary conflicts. President al-Sisi's "Egypt First Doctrine" stresses three main pillars: 1) maintaining a balanced relationship with great powers 2) respect for the territorial integrity and sovereignty of states 3) freedom of maneuvering in the region.

. In Syria, al-Sisi reaffirmed Egypt's commitment towards principles of territorial integrity and state sovereignty. The Egyptian regime had concerns over

the direct repercussions of the fall of President al-Assad and the rise of a potentially Islamic government in Syria. Per the Egyptian perspective, the rise of Jihadists or Islamists might expose Egypt to direct threat, given the internal schism between the Muslim Brotherhood and the Egyptian regime. The ouster of President al-Assad, followed by a potential security and political vacuum that might be filled with Islamic militancy, was not a preferred scenario for Egypt. The Egyptian regime has made it clear that thwarting the so-called terrorism in the Red Sea, Sinai, and Egypt's border's is a top priority (Haddad, 2018, 31; Stanicek, 2021, p.2). This approach was backed by official statements. The Egyptian Foreign Minister Sameh Shoukry said: "the coalition in Syria may want to change the regime in the country, but that's not Egypt's position." (Monshipovri & Zamar, 2017, p.22). In 2016, The Egyptian regime voted in favor of Russia's draft proposal that backed al-Assad (Monshipouri & Zamar, 2017, p.217). When Russia vetoed France's proposal of imposing a no-fly zone on Syria, the Egyptian regime followed suit and backed Moscow's stance (Monshipouri & Zamar, 2017 p.217).

This approach stood in strike difference from Saudi Arabia's stance (until 2016) towards the Syrian crisis. At that time, Saudi Arabia backed the opposition groups, while Egypt remained committed to principles of non-interference. Pragmatically speaking, Egypt's position was based on internal-external calculations. The potential rise of a challenging government in Syria, as mentioned earlier, would have endangered Egypt's internal stability. Concerns over the survival of the regime was a key determinant for Egypt's position. Therefore, Egypt had to prioritize welfare and security at the expense of the interests of it ally (Haddad, 2018, p.25)

In Yemen, Egypt preferred a 'cautious engagement' rather than direct involvement in the crisis, too. This approach was an outcome of omni-balancing calculations as well. As conflicts between sects soared in the region, with IS, al-Qaeda, and Houthis expanding their operations from Syria to Yemen, Egypt feared

the extension of the conflict to include Egypt. Whilst Egypt had no doubts that the Houthis' operations in Yemen constituted direct threat to Saudi Arabia, the Egyptian policy and media circles believed that such operations had no direct impact on Egypt's national security (Nazer, 2015, p.12). Despite strong relations between Saudi Arabia and Egypt, the latter avoided getting dragged in a war that might siphon Egypt's resources and military force. The Egyptian regime feared that investing 'too much' in the war of Yemen would have negative repercussions on the Egyptian domestic politics, particularly it would shift the attention from fighting the so-called "domestic terrorism". The Egyptian Defense Ministry even affirmed that Egyptian troops were not involved in the coalition's operation (Nazer, 2015, p.12). According to official statements, the Egyptian ground troops were not sent to Yemen, with a limited deployment of Naval Vessels to the Bab al Mandab strait to ensure the freedom of navigation (Haddad, 2018, p.42).

In an even-more fragmented region, al- Sisi regime had to diversify his regional partnerships to ensure the survival of his regime. Whilst an expansion of relations with Iran was not an option on the table, economic interests brought them closer. In 2016, the ex-Petroleum Minister Tarek al- Moula made his first visit to Iran to strike an oil deal with Iran (Monshipouri& Zmary, 2017, p.222). This approach was inseparable from the international dynamics, too. As China and Russia rose to power, Egypt was able to exercise foreign policy maneuvering at the global and regional levels. As the US suspended its military aid to Egypt, Russia stepped in to fill the American vacuum. Russia sent 50 combat aircrafts to the Egyptian regime, a move that opened the door for joint military exercises (Stanicek, 2021, p.5).

The military agreements were followed by exchange of diplomatic and high-profile visits (Al-Ged, 2017, p.87).

China, too, seized the opportunity and established a strategic partnership with its Egyptian counterpart. Given the Suez Canal's centrality in the global trade, Egypt has been an integral part of the Belt and Road initiative. During the Chinese President Xi Jinping's visit to Egypt in 2016, almost 21 agreements were signed

between the two countries. On top of such agreements, an investment agreement worth of 15 billion dollars was signed to shore up China's economic presence in Egypt (Maher&Farid, 2023, p.2). In this context, al-Sisi had to diversify his partnerships with global and regional actors to buttress his regime survivability and political maneuverability in an unstable region.

Conclusion:

The paper examined the key determinants of the Saudi-Egyptian partnership (2011-2016), using the theory of Complex Realism. The theory provided an in-depth analysis of the foreign policy determinants in the Middle East. It came as a response to two existing gaps in literature. First, the Western-Centric understanding of the patterns of relations, interactions, and even foreign policies of the states of the MENA region. The theory was inspired by the so-called Area studies that came to deconstruct such a Western-centric understanding of foreign policies, arguing that 'areas' and 'regions' matter in theoretical development. While the mainstream theories of IR and foreign policy emphasize the importance of external threats, which Middle Eastern states face too, they fail to examine how internal threats, particularly threats to the regime survival are key determinants in their foreign policy conduct as well.

Second, Complex Realism moves beyond the redundancy of foreign policy explanations. Instead of overemphasizing the role of the agency (leadership) and overlooking the role of the context and vice versa, it examines how both interact. It highlights how the agency seizes opportunities from the structure to buttress the survival of the regime. In doing so, the theory examines three inseparable environments: domestic, regional, and international. This is not to fall in general descriptions, however. Instead, it examines how the three inseparable environments have a varying impact on the foreign policies of the Middle East. Nevertheless, the key determinant will always be the persistence of the regime.

In examining the Saudi- Egyptian partnership, the article highlights how external-internal calculations have determined the level of partnership. Under

Morsi, the prevailing sense of mistrust limited their partnership. The networking between Islamists in Saudi Arabia and the MB in Egypt raised concerns over potential spillover in the Kingdom. These fears were inseparable from concerns over the potential expansion of the Iranian-Egyptian relations and the rise of a new Egyptian-Turkish-Iranian security triangle in the region amid a declining American presence. Fears over the survival of the regime in Saudi Arabia were the key determinant, however. From the Egyptian side, Morsi rhetorically assured Saudi Arabia that its security is central amid fears of losing Egypt's prolonged financial patron. Nonetheless, as mistrust dominated their relations, and Egypt was pushed closer to Qatar and Turkey, their partnership was limited rather than exclusive.

While the rise of President al-Sisi constituted the optimal scenario for Saudi Arabia, as both upheld the money-for-security relationship, Egypt avoided the adoption of the Kingdom's sectarian agenda. This was manifested in its cautious engagement in Yemen and support for state sovereignty in Syria. Concerns over regime survival and domestic stability prevailed. In Syria, Egypt feared the rise of a pro-MB government, a scenario that might have direct repercussions on Egypt's internal stability. The downfall of al-Assad, that would have been followed by a security and political vacuum to be filled by the Islamists, was not an optimal outcome for al-Sisi's regime. In Yemen, Egypt upheld its rhetorical support for Saudi Arabia, but avoided the country's involvement in unnecessary conflicts that might siphon Egypt's resources and shift its attention away from fighting the so-called 'domestic terrorism'.

Egypt's political maneuvering in its foreign policy at the regional level is inseparable from the general international scene. As the American-Egyptian relations witnessed periods of tensions, Russia and China came to fill the economic and military vacuum. The al-Sisi regime had to diversify his regional and global partnerships to buttress the survival of the regime in an even-more unstable regional environment.

Given the importance of Egypt and Saudi Arabia as key regional players

that shaped the politics of the region, the paper suggests that future studies examine the determinants of their partnership after 2016. As Saudi Arabia gives up on its 'regime change' doctrine in Syria and approaches the Houthis in Yemen, it is important to examine how these new regional dynamics will affect the future of the Egyptian-Saudi partnership. Using Complex Realism, future studies can examine how external-internal calculations will define the degree of partnerships, and their concern over the survival of their respective regimes.

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Assessing the Transformations and Changes in Russia's Foreign Policy towards the West since the Collapse of the Soviet Union

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Abstract:

Essentially, Russia's foreign policy was largely guided by a blend of pro-West policies in the immediate post-Cold War era. However, Russia foreign policy transformed later into a more inclusive, aggressive and competitive anti-West behavior since the beginnings of the 2000th. The aim of this paper is to Assess the transformations that took place in Russia's foreign policy towards the west, and US hegemony since the collapse of the Soviet Union.

This paper raises a main research question which is: How Russia's foreign policy has been transformed towards the west since the collapse of the Soviet Union?

This paper argues that the changes in Russia's foreign policy can be found in both the internal sources of Russia's foreign policy, as well as in the external environment. Thus, this paper uses the power transition theory as the theoretical framework to Assess how Russia transformed from a satisfied great power with a full admission towards the west hegemony into a dissatisfied great power that seeks to challenge the hegemony of the west. This theory will enable this paper to look at the state and system levels of analysis.

This paper is going to be divided into three main sections. The first section will be an introductory section including the theoretical framework, Research questions and the literature review. The second section is going to examine the major events that led Russia to be shifted gradually from a satisfied to a dissatisfied great power. The third section is going to apply the

premises of power transition theory on the Russian case study to come up with the results and argument

Introduction

After the collapse of the Soviet Union, Russia was guided by a blend of pro-western policies with attempts to integrate with the west and to sign partnerships and alliances with the western countries. Later, Russia's foreign policy has witnessed a major shift under the presidency of Putin, as it transformed into one of direct confrontation and competition with the west, especially the United States and the NATO. (Liu,2022). Thus, it is important to assess the factors that led Russia to shift from a pro-western diplomacy in the immediate post-Cold war era to a complete anti-western stance under the president Putin. An examination of the changing patterns of new Russia's foreign policy since the collapse of the Soviet Union is a complex but interesting study in contemporary international relations. (Liu,2022). After the collapse of the Soviet Union, Russia's leaders could not have had a full understanding of which direction their country would take or what Russia's foreign policy goals and priorities would be. The first president for Russia mentioned this clearly in 1992 speech, by saying that "Russia's difficult transitional state does not allow us yet to discern its new or permanent character, nor does it allow us to obtain clear answers to the questions "What are we turning away from? What do we wish to save?" and "Which elements do we wish to resurrect and which do we wish to create a new?" (Kumar,2016). This paper aims to analyze Russia's foreign policy since the collapse of the Soviet Union, focusing on the various changes and transformations that took place in its foreign policy towards the west, especially the United States and the NATO under president Putin. This paper tackles the Russia-Georgian war as the main case study, as this war represents the start of the shift of Russia's foreign policy towards an aggressive and assertive behavior.

1.1 Research questions

This paper raises a main research question which is why Russia has transformed from a satisfied great power with a full admission of the west hegemony to a dissatisfied great power that seeks to challenge the existing international order?

This paper raises four sub-questions in order to answer the main question which are:

- a- What are the major transformations that took place in Russia's foreign policy towards the west since the collapse of the Soviet Union?
- b- What are the external factors that led Russia to adopt more critical and risky foreign Policy behavior towards the west?
- c- What are the internal reasons behind the transformations and shift in Russia's foreign policy since the collapse of the Soviet Union?
- d- What are the interests and goals shaping Russia's foreign policy behavior towards the west?

1.2 Theoretical framework

This paper uses the power transition theory in order to answer the main research question of this paper. The power transition theory has two main assumptions. The first one is that power is an important and crucial variable that shapes the way in which the international order works and operates. According to this theory, the international system is hierarchically classified into four main categories. At the top of the international system lies the dominant nation, which is the most powerful state that sets and controls all the rules of the international system. Today, the dominant nation is the United States. Under the dominant nation, there are the great powers and then the middle powers, and the small powers lie at the bottom of the international system. The second assumption of the power transition theory is related to the degree of satisfaction with how the goods are distributed in the international system and with the way in which the international system functions. Thus, Power transition theory argues that power and degree of satisfactions are

the major determinants of war and peace. States can be satisfied or dissatisfied with the hegemony of the dominant nation. (Kugler & Organski, 1989), According to the power transition theory, the weak states that are dissatisfied with the way the international system works do not have the ability to pose any threat to the hegemony of the dominant nation. But if the dissatisfied nation is a great power and powerful state, it can pose a threat to the dominant nation. In case the dissatisfied great power has grown in its capabilities and power after the existing international system's setting, then the conditions for war exist. A stable international system can be threatened when the challenger seeks to create a new place for itself in the international system. According to the power transition theory, the conditions for peace in the international system exist when the dominant state has high power advantage over the other states in the international order. (Kugler & Organski, 1989). This is why the power transition theory argues that peace is more likely to exist in the international order during the periods of preponderance. This theory also mentions that most of the great powers are most likely to be satisfied with the existing international order and allies to the dominant nation. (Bussmann & Onael, 2007).

This paper chooses the power transition theory in order to analyze the transformations in Russia's foreign policy since the collapse of the Soviet Union by focusing on the external and internal factors to determine the course of Russia's foreign policy. As it is not sufficient to analyze only foreign policy, because foreign policy is driven by the domestic policy and a mirror of it.

Power transition theory looks at the state and system levels of analysis. On the system level of analysis, this paper focuses on Russia's interactions in the international system and its foreign policy towards the west since the collapse of the Soviet Union. This theory enables this paper to understand the reasons behind Russia foreign policy shift from pro-western diplomacy in the immediate post-cold war era into anti-western stance against the west, and especially the United States. Under the president Putin, Russia has adopted a more aggressive and assertive

behavior to challenge the international system dominated by the United States. On the state level of analysis, this paper focuses on the improvements that happened in Russia's economic and military capabilities and enabled the country to adopt aggressive behavior against the west.

1.3- Literature review

This section focuses on tackling the previous literature and the different views adopted by different schools of scholars to answer the main research question regarding the reasons behind Russia's major shift and changes in its foreign policy towards the west, as well as this section focuses on assessing the gap in the existing literature on this topic. The literature on this topic can be divided into three main sections. The first school of thought in the literature believes that the personal characteristics of the president Putin represent the main reason behind Russia's foreign policy transformations. The second group believes that the state level of analysis is the most important one in assessing the causes behind transformations in Russia's foreign policy, as this group focuses on the domestic factors shaping the course of Russia's foreign policy since the collapse of the Soviet Union. The third and last group argues that Russia interactions in the international system with the west and its great power mentality were the main factors fueling Russia to adopt more assertive and aggressive foreign policy behavior towards the west.

1.3.1- The role of president Putin in shaping Russia's foreign policy (Individual level of analysis)

There is a school of thought in international relations that put emphasis on the role of the decision maker as the main factor shaping foreign policy. As Dmitri Trenin ,2015 argues that president Putin is the type of the leaders who shape the foreign policy of his country based on his own beliefs, and based on how he perceives the role of his country in the international system. He elaborated that he sets the foreign policy priorities of his country based on his own beliefs and interests. Mendars (2015) agreed with the previous with Trenin's argument,

and he elaborated his stance by arguing that Putin uses the foreign policy of his country as a tool to strength his domestic power inside Russia.

Fiona Hill argued that Putin's personality includes six crucial traits that made him the leading factor in shaping and influencing Russia foreign policy, its priorities, objectives and its methods. These traits are statist survivalist, history man, case officer, and outsider, as well as free marketer

1.3.2- The role of domestic factors in Shaping Russia's foreign policy

This group of scholars believes that the domestic and internal factors are the most important ones in Shaping a country's foreign policy. As Aron (2013) & Vášáryová, (2015) believed that Russia uses its economic power and energy superpower as main tools in influencing and shaping its foreign policy towards the other countries. Maulidia (2017) stressed that Putin uses the energy as a card to restore the great power status of his country in the international system. Kuchins & Zevelev, (2012) elaborated that Russia was able, since the rapid increase in oil prices in 2003 that led to economic growth of the country, to introduce a shift and change in its foreign policy by adopting a new nationalist approach and strategy, which characterized mainly by its opposition and resistance to the international system dominated by the west, and especially the United States.

Hancock, (2007) agreed with the previous arguments that the domestic factors are influencing Russia's foreign policy, but he put more emphasis on another domestic factor which is Russia's military power as the most important factor that fuels Russia to adopt such an aggressive and assertive foreign policy towards the west. Lantier, (2015) built on the previous argument and argues that as the president putin knows that the military power is a major driver behind Russia's foreign policy behavior, he took the decision to modernize and maximize the military capabilities of his country to preserve its great power status in the international system.

1.3.3 The role of Russia interactions in the international system in shaping its foreign policy (System level of analysis)

This school of thought puts more emphasis on the importance of the external and international factors in shaping the country's foreign policy behavior. As Sakwa, (2013) argued that the changes in Russia's foreign policy behavior were driven, to a large extent, by Russia disagreements with the west on some issues such as; the enlargement of the NATO. He elaborated that Russia aggressive actions in Georgia in 2008 and the annexation of Crimea in 2014 were a way from Russia to respond to the possibility of their membership in the NATO. DeBardeleben, (2009) & Asmus, (2008) built on the previous argument by saying that Russia opposes not only the enlargement of the NATO, but also the EU towards the previous territories of the USSR. They argued that the main goal behind Russia's foreign policy actions is to have influence over these areas, which Russia expressed as "sphere of special interest".

Ditrych, 2014 focuses more on the relationship between Russia and the United States, and how this relation influences the Russia's foreign policy actions. He elaborated that the relationship between Russia and the US has witnessed many tensions since the collapse of the Soviet Union This is why each action taken by each side is perceived by the other side as a way to dominate the global order. Mearsheimer , (2014) & Walt, (2015) agreed with the previous argument and elaborated that Russia's actions in Georgia and Ukraine were used by Russia as a tools to re-create a new global system instead of the existing one that is dominated by the west, and especially the United States.

1.4 Literature gap, research problem and significance

The literature on the changes and transformations in Russia foreign policy towards the west since the collapse of the Soviet Union can be criticized for not combining the external and internal factors together to assess the course of Russia's foreign policy. As the literature tackles each factor and level of analysis separately. To fill

this literature gap, this paper offers an integrative approach through the power transition theory in order to analyze the main reasons behind the shifts and transformations in Russia's foreign policy since the collapse of the Soviet Union. This paper focuses on both the state and system levels of analysis in order to answer the main research question.

The main research problem lies at the problematic Russia-west relations that turned later into a geopolitical crisis and struggle, as well as to what degree the complicated and problematic relations and interactions between Russia and the west have influenced the outcome of many conflicts such as; the Russia-Georgian war 2008 and the Ukrainian crisis since 2014.

While a lot has been written on this topic, but an approach that combines different levels of analysis through power transition theory can be considered as a new approach and an addition to the existing literature on this topic.

1.5 Division of the paper

This paper is going to be divided into five main sections. The first section is going to be an introductory chapter that includes the research question, theoretical framework, literature review, literature gap and the importance of the topic, as well as the division of the paper. The second section provides an overview of the stages of Russia's foreign policy since the collapse of the Soviet Union. The third section focuses on three main events that represent that spark of the tensions between Russia and the west. The fourth section is going to focus on the external and internal factors shaping Russia's foreign policy towards the west since the collapse of the Soviet Union. The final section will provide the findings and conclusion of the paper.

2- Overview of Russia foreign policy's stages since the collapse of the Soviet Union

Russia's foreign policy has undergone several stages and phases since the collapse of the Soviet Union. This phases can be divided into three main stages

which are: Pro-western diplomacy from 1991 till 1995, multipolar diplomacy from 1996 to 2006 and Great power diplomacy from 2007 till now. (Kumar, 2016).

The first phase was a pro-western diplomacy and it began from 1991 until 1995. During this phase, Russia was pursuing integration with the western countries, as well as seeking partnerships and alliances with the west. The second phase, which is the multipolar diplomacy phase, lasted from 1996 until 2006. Russia's foreign policy in this stage had witnessed a gradual shift from a pro-western stance into more pragmatic behavior. In this phase, Russia declared the importance for creating a multipolar system to replace the United States hegemony and its domination of the international system, as well as focusing on making partnerships in the East and near abroad. (Liu,2022). The third phase of Great power diplomacy started with the speech of president Putin at Munich 2007, when he accused the NATO and the United States of provoking an arms race and seeking global dominance. This speech was followed by Russia invasion of Georgia in 2008 and its annexation of Crimea in 2014, which was a sign that Russia's foreign policy has been shifted into a risky and assertive towards the west. During this phase, Russia has a main goal of restoring its status as a great power in the international order, as well as re-creating international system to be replaced by the existed international system dominated by the United States. This sections shows that Russia's foreign policy has shifted from one aims to achieve a full scale of cooperation with the west in the immediate post-cold war era into a one of direct confrontation and competition with the west, especially the United States and the NATO under the administration of Putin. (Kumar, 2016).

3. Important events in Russia's history with the West

There are three major events that led Russia to change its foreign policy towards the west and to transform from a satisfied to dissatisfied great power in the international arena. These events represent the start and spark of the tensions between both sides. The three events are the Kosovo war 1999, NATO summit in Bucharest April 2008 and Russia-Georgian war 2008.

3.1 Kosovo War 1999

The Kosovo conflict and NATO's intervention in Kosovo 1998-1999 can be considered as a starting point for the tensions between Russia and the West, especially NATO. As NATO launched military strikes from March until June 1999 against Serbia, justifying its intervention by a humanitarian cause. Due to the Kosovo conflict, Russia and the west's relation entered a deterioration phase. (Jashari, 2022). From Russia's stance, NATO's involvement in Kosovo war was unacceptable and this conflict represents the biggest stalemate in the relations between the western side and Russian side for several reasons. First, Russia opposed NATO's intervention in Kosovo for diminishing its role in conflict resolution. Second, NATO intervened in Kosovo without the approval and authorisation of the UN's security council. Third, NATO enlargement represents a threat to Russia's national interests and security. As by intervening in Kosovo, the NATO was granting itself a new role in operations, conflict resolution and excising influence in "out of area" regions. (Jashari, 2022).

3.2 NATO summit in Bucharest April 2008

From 2 to 4 April 2008, the NATO summit in Bucharest April 2008 took place in Romania, and it was the largest-ever NATO annual Summit. This summit raised many fears for Russia, as this summit showcased NATO's plans for further eastward enlargement. The Membership action plans was the first step for both Georgia and Ukraine to become members of the NATO. Russia perceived NATO enlargement towards Ukraine and Georgia as a direct threat to its strategic and security interests, as it considered these two areas as "areas of influence". (Khan, 2008). Despite Russia's refusal and pressure, the NATO's leaders in this summit agreed to promise two Black

Sea states, Georgia and Ukraine of eventual membership, and announced that these two countries would be members of the NATO one day. Thus, this summit can be considered as a major event that led Russia to start shifting its foreign policy towards the West. (Khan, 2008).

3.3 Russia-Georgian war

This paper chooses Russia's military invasion of Georgia as the main case study, because it represents the start of the shift in Russia's foreign policy behavior. Moreover, this case study shows that Russia has shifted under the president Putin to pursue an assertive, aggressive and risky foreign policy. In August 2008, Russia decide to go to war with Georgia and intervened in Georgia to protect South Ossetia. This arm conflict and war between Russia and Georgia represents one of the most important issues of Russia tensions with the NATO, United States and the European Union. (De Haas,2009). Russia war with Georgia included its invasion of some of Georgia's territory and its establishment of an independent political entity which is south Ossetia. Russia decided to go to war with Georgia to prevent the enlargement of the NATO into Georgia. The result of this war was that Russia won a 5-days war against Georgia. This war between Georgia and Russia came as an unexpected surprise to the world countries, and they also got surprised by the results of this war. (Magen,2013).

After Russia war with Georgia, the NATO responded by freezing most of the military and political cooperation with Russia. Russia war with Georgia is a case study of the shift that took place in Russia's foreign policy towards a more aggressive and assertive behavior under president Putin. As this armed conflict was the first conflict since the collapse of the Soviet Union where the armed forces of Russia crossed their country's borders and invaded the territories of another European country. (Liu,2022). Before this armed conflict in Georgia, Russia was using non-military tools such as; cyber-attack and oil embargo. Russia invasion of Georgia sent a clear message that Russia is ready to challenge the international system dominated by the west and that it is prepared to use military forces to protect its national and security interests. There was an important event that fueled Russia to invade Georgia which when Georgia identified its membership in the NATO and the EU as strategic goals. By 2008, Russia had achieved a great

progress in becoming close to the NATO and its standards. At that time, Georgia was known as US ally and NATO partner due to its participation and contribution NATO operations in Kosovo from 1999 until 2008, and Iraqi freedom operation that took place in 2008. This raised many fears inside Russian leaders that Georgia could be a member in the NATO, which Russia perceives as a threat to its national and security interests. As Russia perceives that the presence of military base close to its borders as a direct threat to its security interests. Since then, Russia has become ready and prepared to use military force at any time when feels that its national security could be threatened. (Magen,2013).

4- External and Internal factors shaping Russia's foreign policy towards the west

This section focuses on the external and internal factors to determine the course of Russia's foreign policy. As it is not sufficient to analyze only foreign policy, because foreign policy is driven by the domestic policy and a mirror of it. This is why this paper chooses the power transition theory, as this theory works on both levels: the external and internal ones. Russia's foreign policy during the president Putin era can be analyzed and evaluated based on several criteria and grounds. Since Putin became the president of Russia, he has two main goals: the first one is to preserve Russia's unity, and to restore its status as a great power in the international arena.

4.1 External factors

This sub-section focuses on the system level of analysis by assessing the external factors shaping Russia foreign policy's behavior towards the west since the collapse of the Soviet Union. This section focuses on Russia's interactions in the international arena and its relations with the west in order to determine the external reasons behind Russia's major shift from a pro-western diplomacy in the immediate post- cold war era to the anti-western stance and assertive foreign policy behavior under the president Putin.

4.1.1 Great power mentality

Although Russia's foreign policy has gone through different stages from pro-

western to anti-western stance, it has a main goal since the collapse of the Soviet Union which is the restoration of its great power status. Russia has always over the past three decades adhered to the mentality of the great power, as Russia perceives itself as a great power and believes that its status as a great power should be respected by the international community. This goal has guided Russia in most of its actions and foreign policy behavior since the collapse of the Soviet Union. Under the presidency of Yeltsin, Russia has taken some measures to integrate with the western countries as a way to restore its position in the international arena. After the collapse of the Soviet Union, Russia foreign policy behavior resulted from its belief that the international system is a unipolar one, with the United States as the dominant nation. This is why Russia believed that it should be as close as possible to the United States and the West to be recognized by the international community. This dominated Russia's foreign policy behavior during the honeymoon phase with the West under President Yeltsin. (Magen, 2013).

During the first years of President Putin, he adopted a similar approach and strategy of Yeltsin by focusing on the acceleration of Russia's cooperation with the West and international arena, with the aim of enabling Russia to promote its status and position in the international arena. At that time, there was a hope for cooperation between Russia and the West. However, this strategy was accompanied by ups and downs in the relationship between Russia and the West. At that time, the West has taken some actions including the acceleration of the NATO eastward expansion, which damaged the interests of Russia and led to the end of the honeymoon phase between the both sides. This strategy succeeded to close the relationships between the West and Russia, but it has failed to integrate Russia with the family of the West. This is why Russia's efforts to achieve cooperation and positive relations with the West in the immediate Post-cold war era was followed by a cooling-off period in their relationship. (Minkina, M, 2019)

Since Putin became the president, he positioned the goal of restoring the great power status of Russia at the top of his foreign policy priorities, with the pragmatism

and pursuit of Russia's national interest as the main guiding principles. During the first years of president Putin, there was a window for cooperation between Russia and the West, especially the United States, as there were two opportunities at that time for positive relations between both sides. The first opportunity was in 2000 when Russia ratified STARTII treaty with the United States on the reduction of strategic nuclear weapons. The second opportunity lies in the appearance counter terrorism strategy, as Russia expressed its support for the "War on terror" declared by the US after 11 September in 2001. However, these efforts for cooperation between the west and Russia were short lived hopes. (Borozna, 2022)

As the west did not take actions at that time to recognize Russia's as a great power, Russia turned to the multipolar diplomacy to achieve its goal to replace the existing unipolar system dominated by the United States. A shift in Russia's foreign policy towards the west appeared in 2007, when the president Putin said it clear at a security conference in Munich that "accepted neither being preached at by the West nor by the unipolar world". He insisted that the world should be a multipolar one and Russia's national interests and position in the international system should be respected. He also at the Munich security conference in 2007 accused the United States of pursuing to dominate the international system and described the United States concept of the unipolar international system as based on "one single center of power" and "one single master, one sovereign". (Minkina, M. 2019).

Russia has never accepted the unipolar international order which emerged after the breakup of the cold-war world. By means of assertive and anti-western politics, it demands to be recognised as a superpower eligible to decide on the international order. (Minkina, 2019).

With the elections for the president putin for a second term in 2012, Russia's foreign policy has changed completely and entered a new era. In 2012, Putin expressed his goal of making Russia at the center of a multipolar international system, as well as advocated the need for radical change and the creation of new rules and international institutions to replace the existing ones that dominated by

the West, and especially the United States. Recently, Putin identified Russia's foreign policy as being in complete confrontation and opposition to the United States and unipolar system. (Liu,2022)

4.1.2- NATO Eastward Expansion

In the immediate aftermath of the demise of the Soviet Union, Russia's foreign policy includes efforts to have positive relations with the NATO. This Strategy led Russia to sign the North Atlantic Cooperation Council, which renamed as the Euro-Atlantic Partnership Council in 1997. In 1994 Russia joined the Partnership for Peace, which gave hopes at that time that there could be a new level of positive relations between both sides and that Russia could integrate with the NATO world order. However, this relationship witnessed a difficulty and many tensions. One of the main issues that fuels the confrontation and tensions between Russia and the west is the NATO eastwards expansion. As Russia's foreign policy has shifted and changed in 1994 with the NATO interventions in Bosnia and the decision to enlarge. (Magen, 2013). From the start, Russia expressed clearly its complete opposition to the issue of NATO enlargement, as it perceives this act as a direct threat to its security and national interests. Russia has continued to express, in the strongest possible way, its complete opposition to the enlargement of the former soviet areas. As president Putin said in one of his speeches in 2007 that "I think it is obvious that NATO expansion does not have any relation with the modernisation of the Alliance itself or with ensuring security in Europe. On the contrary, it represents a serious provocation that reduces the level of mutual trust. And we have the right to ask: against whom is this expansion intended? And what happened to the assurances our western partners made after the dissolution of the Warsaw Pact? Where are those declarations today? No one even remembers them. And now the NATO allies are trying to impose new dividing lines and walls on us—these walls may be virtual but they are nevertheless dividing, ones that cut through our continent". (Gheciu, 2009)

The expansion of the NATO eastwards represents one of the main issues that

causes tensions and conflicts in the relationship between Russia and the west. Russia perceives the NATO as a strong and unfriendly military bloc and its expansion in its borders threatens its national and security interests. (Narozhna, 2021).

Russia opposed the membership of Georgia and Ukraine in the NATO. After days from the NATO summit that took place in 2008, the Russian armed forces' chief of staff delivered a clear message to the world by saying that "Russia will take military and other steps along its borders if ex-Soviet Ukraine and Georgia join NATO". The war in Georgia delivered a clear message that NATO members should expect a very tough response from Russia, if they decide to proceed with further enlargement into former Soviet territories. Russia always identifies the NATO as unfriendly actor that poses direct threats to Russia's national interests and provoking distrust and irritation. (De Haas, 2009)

Russia gives high importance for its national security, and its security interests and objectives take precedence over any other objectives. As Russia considered the question of NATO enlargement as related to its national security, Russia has continued to oppose the NATO expansion into Eurasian countries including Georgia and Ukraine. This explains why Russia invaded Georgia in 2008 and annexed Crimea in 2014 and decided to go to war with Ukraine in 2022. Russia stressed that the post-soviet territories as a sphere of special interest. (Liu,2022)

Under the administration of Putin, Russia pursues to re-create and establish a new international system in its own favor and to safeguard its interests and to have influence over the territories that were part of the USSR before the cold war. Russia believes that the west seeks to undermine its position in the international system by isolating it from the territories that were part of the USSR before its dissolution. (Minkina, 2019)

4.2 Domestic factors

This section focuses on the domestic factors and causes behind Russia's foreign policy shift into an assertive and anti-western stance. It is important to focus on

both the internal and external factors shaping Russia's foreign policy since the collapse of the Soviet Union, because foreign policy is driven by the domestic factors and is a mirror of it. According to the power transition theory, the dissatisfied great powers could not pose threats to the dominant nation except if it has enough capabilities. Thus, it is important to focus on the capabilities that led Russia to be able to challenge the west and the international system dominated by the United States. 4.

4.2.1 Military Capabilities

After the collapse of the Soviet Union, the armed forces in Russia faced many critical challenges. During the 1990s, Russia attempted to initiate reforms for its armed forces in order to create a combat-ready core within this overall structure. However, these attempts were unsuccessful and the reforms began only to improve in 2003 with the introduction of contract-service initiative by the Ministry of defence. Since Russia's war with Georgia, the Russian Ministry of defence has undertaken extensive efforts with the aim of upgrading and modernizing Russia's armed forces. (Renz, 2016). These modernisation efforts since 2008 have provided Russia with a credible military tool to achieve its national policy goals. Since the modernisation efforts, Russia's armed forces are witnessing major developments and its conventional capabilities are growing and becoming impressive than at any time since the collapse of the Soviet Union. This extensive modernisation program has achieved impressive results since 2008 and led to the process of military revival in Russia. The military reform and modernisation program was planned to run until the 2020s, with the aim of converting Russia's armed forces into modern and advanced multi-task forces capable of managing and facing the challenges and threats in the international system. (Nichol, 2011). This program focuses on solving several problems including corruption, ageing equipment as well as limited readiness. Moreover, Russia's reforms aim to achieve structural transformations through re-equipping the forces with modern equipment and defence systems, increasing the forces' combat readiness and reducing the

force structure. The improvements and development that happened in Russia's military capabilities maximised the possibility of offensive and aggressive action towards the west. (Liu,2022).

- Economic Capabilities

Russia economy has achieved a major and tremendous growth fueled by the rapid increase in energy prices, as the prices of oil reached its peak before Russia invasion of Georgia in 2008. During the first presidential term of Putin, Russia has witnessed a fast recovery for its economy, which enabled Putin to reduce the dependence of his country on foreign assistance. This encouraged Putin to adopt assertive and aggressive behavior against the west. (Porfiriev, 2020).

Russia felt that its interests and goals were disregarded by the west, which fueled Russia to adopt assertive, aggressive and risky foreign policy behavior towards the west in the international arena. The rapid and fast increase in oil and energy prices had positive impact not only on Russia's economy, but also on the country's political self-perception. Russia perceives its energy supply as a main and important source of its international competitive advantage. Russia under Putin decided to shift its energy policy towards one of more pragmatic and technocratic policy. (Magen, 2013)

5- Conclusion, argument and findings

This paper started by raising an important research question regarding the factors that led Russia's foreign policy to transfer from a pro-western stance in the immediate Post-cold war era into a complete anti-western stance under the administration of Putin. This paper examines the phases of Russia's foreign policy since the collapse of the Soviet Union. The first phase began from 1991 until 1995 with the main focus of creating positive and close relationships with the west. The second phase was the multipolar diplomacy which began in 1996 and lasted until 2006. During this phase, Russia's actions were designed to restore its status as a great power and declared the need for a multipolar system not a unipolar one. The third phase was the great power diplomacy which began since 2007, as Russia

started to adopt an aggressive and assertive foreign policy behavior towards the west and accused the United States of seeking global domination.

This paper then focuses on Russia invasion of Georgia since 2008, because this case study represents the start of Russia's foreign policy shift towards a more-risky and assertive foreign policy. Russia's invaded territories in Georgia to deliver a message to the world that it is prepared to take military action if the NATO attempts to join the territories that were part of the USSR. As Russia perceives these territories as of special interest, and it believes that the NATO enlargement towards its borders as a direct threat to its security interests. This paper then focuses on assessing the external and internal factors behind the changes and transformations in Russia's foreign policy towards the west since the collapse of the Soviet Union.

On the system level of analysis, this paper examines that that there are two external factors that led Russia to transfer from a satisfied power to a dissatisfied great power with how the goods are distributed in the international system and seeks to challenge the existing international system. The first reason is that Russia has the great power mentality and it perceives itself as a leading power in the international system that should be respected by the west. At the first, Russia thought that its close relations with the west will help the country to restore its status as a great power. However, this turned wrong and the west did not recognize Russia as an equal and great power. This fueled Russia to transfer its thought of thinking and to challenge the existing international order dominated by the west. The second external factor that raises the tensions between Russia and the west is the enlargement of the NATO, as Russia perceives the enlargement of the NATO into its borders as a direct threat to its national and security interests.

On the state level of analysis, this paper examines that Russia has witnessed during the administration of Putin improvements in its military and economic capabilities. These capabilities enabled Russia to be strong and to have independent foreign policy, as well as pushing the president Putin to adopt an

assertive and aggressive foreign policy behavior towards the west. By applying the power transition theory, this paper understands that Russia has shifted its foreign policy behavior because it transferred from a satisfied into a dissatisfied great power, and that it has grown in capabilities after the creation of the existing order which enable the country to pose threats to the west and to challenge the existing international order dominated by the west. This paper is an addition to the existing literature because it offers an integrative approach to understand the course of Russia's foreign policy since the Collapse of the Soviet Union.

This paper argues that Russia has transformed its foreign policy behavior since the collapse of the Soviet Union because it has shifted under the administration of Putin from a satisfied power with a full admission of the US hegemony to a dissatisfied great power that seeks to challenge the global order dominated by the west to preserve its status as a leading and great power. Moreover, Russia under the administration of Putin has witnessed improvements in its economic and military capabilities that made it able to adopt assertive and aggressive foreign policy behavior against the west.

Biography

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The Impact of Women's Participation in the United Nations Peacekeeping on the Effectiveness of the Operations

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Abstract:

Since 1948, the UN Peacekeeping Missions have been playing a significant role in helping countries navigate the difficult path from conflict to peace. Despite the tremendous efforts in sustaining troops and police from around the globe, to integrate them with civilian peacekeepers to advance the effectiveness of missions, there was a considerable lack of women integration in these troops. For that reason, the Security Council (SC) passed the United Nations Security Council resolution number (UNSCR/1325) on the 31st of October 2000.

Consequently, many participating militaries around the world strived to achieve gender equality and opened more doors for women to join services at home and abroad. Egypt, which is one of the largest contributors to the UN peacekeeping Missions, prioritized increasing female peacekeepers on its agenda given the importance of the role of women in peace processes (CICCR, 2016; Donadio, 2019; UN Peacekeeping, 2022).

This paper aims at reviewing the existing arguments in literature that are mostly used to advocate for the increase of women in the UN peacekeeping operations (PKOs). In that context, this paper argues that increasing the number of women in PKOs is improving the effectiveness of the mission operation itself in any country, which is significant because the more these missions are effective, the less conflicts will occur. The UN PKOs is the only international military around the world existing, that does not use force, but rather work on achieving peace globally and preventing peace and conflict. Accordingly, its operations effectiveness is necessary to maintain peace all

over the world.

This paper will be divided into three sections. The first section will list the arguments that have been commonly used in literature to advocate for increasing women in PKOs. The second section will focus on how increasing women in PKOs have a direct impact on the following areas: maintaining protection, preventing sexual violence, and inspiration of other women in joining the PKOs. The third section will focus on providing evidence from case studies to prove the previously mentioned.

Introduction

Since 1948, the United Nations Peacekeeping Missions (UN PKOs) have been playing a significant role in assisting several communities to prevent conflicts and maintain peace. Yet, despite the tremendous efforts of sustaining police officers from around the globe to advance the missions' effectiveness, there was still a considerable lack of women integration in these troops. For that reason, the Security Council (SC) passed the United Nations Security Council resolution number (UNSCR/1325) on the 31st of October 2000 to increase the number of women. This paper aims at linking the existing arguments in literature that are mostly used by scholars to advocate for the increase of women in the UN PKOs with feminist scholars advocating for the importance of women contribution under the feminist theory of security (FST). From an FST perspective, the more integration of women in policy agendas is necessary in maintaining any security condition.

This paper attempts to address the following question: to what extent are women in the UNPKO contributing to the effectiveness of the operations? In response to this question, this paper argues that the more integration of women in the UN PKOs is necessary in maintaining any security condition.

This goes parallel in line with the UNSCR 1325 which affirmed the important role of women in prevention and resolution of conflict and in peace building initiatives. This can be reflected in areas of gender equality, as that women in peacekeeping can easily build trust with local communities and especially women and children, which will prevent bias in providing adequate protection to women and will create more chances of equality between men and women in a conflict or post conflict areas. Secondly, female peacekeepers can get more empowered as that this experience gives them opportunities of receiving awards and reaching 4 higher positions on the international level in security related jobs. Thirdly, the integration of women in UNPKOs attracts other women to join and they became role models for other female soldiers who were encouraged to join after they have seen the success of the female peacekeepers in advancing the level of the operations.

This topic is significant for three reasons that can be assessed on the three levels: individual level, societal level, and global level. Firstly, female peacekeepers serve as powerful mentors and role models for women and girls in post-conflict settings in the hosting countries. On the societal level, the more integration of women in the UNPKOs does have an impact on the masculine societies that still face difficulties in enhancing women rights and empowering them. The third, which is on the global level, women in the UNPKOs contributing to the improvement of the UN PKOs by sustaining a long-term peace, does help the countries navigate the difficult path from conflict to peace.

This paper will be divided into five main sections. The first section, 'theoretical framework', will explain the academic roots of the Feminist Security Theory. In addition to the major unit of analysis in the theory. According to the Feminist

security theory, the inclusion of women in any security related agenda leads to three important outcomes: gender equality, more women empowerment, and framing.

According to the first, increasing the number of women in PKOs advances the missions as that woman are more capable of providing protection to other women who are victims of gender-based violence. According to the second, women are now gaining more power as that they are holding higher positions in an international security organization. Finally, female peacekeepers became role models for other women in some of the highly gendered societies.

The second section will discuss the methodology that the research will use and will apply it on the topic of this research. It will focus on the 'qualitative approach' which will include: 1) a literature review, on some of the scholars' opinions advocating for the increase of women participation in the UN peacekeeping operations; 2) a discourse analysis which will analyze some of the speeches of important figures advocating the increase of women in the UN PKOs; and 3) it will show statistics that proves that the number of women in UN peace operations is increasing since the release of the UNSC 1325 resolution.

The third section, 'assessment criteria', will provide the major factors that are commonly used by scholars to answer the research question on the relation between the women integration in the UNPKOs and the effectiveness of the operations. The fourth section will use this assessment criteria on applying some of the 'case studies' that show how the increase of women in the UN PKOs made an improvement in the effectiveness of the operations. The case studies will use examples from Bangladesh, Mongolia, Egypt, and India.

The fifth section will provide a 'recommendation' on how to maintain an increasing number of women integrating in the UNPKOs in addition to significant tools of maintaining not just an increase in their numbers but also policies that provide more protection for women inside the missions. The last sections will provide a conclusion and the list of sources.

1) Theoretical Framework:

Feminists' scholars emphasized the importance of considering gender lenses in analyzing many subjects related to International Relations. For example, in examining what is happening in certain global affairs, Cynthia Enloe once asked: "Where are the women?" (Williams, 2021). Likewise, the feminist security theory has prioritized gender in conceptualizing security and showed that more women integration is a key part of solving certain security problems (Sjoberg, 2018).

The feminist Security Theory is rooted in the wider subfield of Feminist Security studies as it claims that there is a connection between the gender norms, structures, and ideas, and the understanding of the security studies. The theory analyzes the securitization process and in particular how the role of men and women have an impact on the political arenas. Moreover, the analyses under this theory are not just limited to the role of women within security studies, but moreover how gender determines social structures, political systems, and any academic scholarship.

Academic Roots

In early 1990s, the IR theories (realism, liberalism, etc..) were criticized by the feminist scholars for the masculinist bias in the field, arguing that, this is problematic. Williams (2022) stated that in 1988, the first journal on the topic

of women and the International Relations was published. This was the starting point for the several work that followed on the scholarship of women and IR. Feminist research expanded and began to use several methodologies such as case studies, narratives, and interviews. This was the beginning of the emergence of the Feminist Security Theory which utilizes a gender analysis that focuses on women and men, power relations, and gender hierarchizes/order.

“Feminist scholarship includes a normative aspect: in studying gender, power and women, feminist scholars seek to achieve gender equality and to increase women’s economic, political, cultural, and social status and rights around the world. As feminist IR scholarship developed in the 1990s, the field moved from “add women and stir” approaches to making gender a central category of analysis”. -Williams (2022).

Since the emergence of the feminist security studies, many issues were addressed by several scholars. Blanchard (2003) asserted that the contribution of the feminist security theory in the field of International Relations is of high importance as that it challenges the traditional IR concepts of security, peace, and war and rather prioritizes how women and gender are extremely relevant and important in understanding security. “Women are not often protected by the very state that is assumed to provide protection.” (Blanchard, 2003).

Sjoberg (2018) also explained that the word ‘gender’ in international security refers to “more than someone’s apparent sex; it refers to the divisions that we see and make between those understood to be men and those understood to be women, and also the ways those traits operate in social and political life-at the individual level, in social interaction, in workplaces, in organizations, in

politics, etc....”.

Sylvester (2010; as cited in Williams 2022) examined the historical connection of feminism with peace and nonviolence, noting that “feminist IR research increasingly has demonstrated how women participate in political violence and support wars”. Sjoberg (2018) likewise explained that since the beginning of the feminist work in the field, scholars have been analyzing issues related to how gender has a role in conflict, peace, war, and militarism. It is further explained that Feminist & Security Theory is, as how it sounds, “thinking about security in the global political arena through gender lenses” (Sjoberg, 2018).

“Debates about whether FSS is “feminist security” studies or feminist “security studies” have asked about the subfield’s focus-whether it is toward rethinking security in feminist ways or toward the mainstream field of security studies as such. With space in the field for both approaches, feminist security theorizing has looked at revealing the importance of gender in conceptualizing security, demonstrating that gender is key to understanding causes and predicting outcomes, and showing gender as a key part of solving security problems”. - Sjoberg (2018).

The Feminist Security Theory prioritized gender equality, consciousness about framing, and an awareness of sociology as an important factor in the political examination of global affairs in relation to any security condition. Therefore, it is necessary to explore these concepts, which is explained in the next section, to emphasize on the relation between gender equality and framing as considerable outcomes in integrating more women in security agendas.

Unit of Analysis

Similar to other security studies, the unit of analysis in the Feminist Security Theory focuses primarily on nation states and how there is a relationship between the power of the state and the security of other states. However, the FST extends the scope to include, through gender lenses, the security of individuals within larger international institutions and structures. Moreover, the theory also focuses on other varying issues such as the economy, gender, and race. Yet, there are three main unit of analysis under the theory (Sjoberg, 2018).

The first is gender, which extends within the feminist security theory beyond the traditional understanding of men polarity to issues such as how gender orientation is socially constructed and the further impact of gender on several political discourses. The famous Feminist Security Theory scholar, Cynthia Enloe (as cited in Molyan 2013) criticized the security systems through examining the lack of gendered perspective on how this created a masculinized field globally.

“The decisions and academia produced as a result of the masculinisation has created security studies to be socially perceived as a position for men. This also informs the power relations that is existent as a result of the hegemonic masculinity in security”. -Cockburn (2013).

The second is power, which is a common unit of analysis in the explanation of many traditional theories. Yet within the Feminist Security Theory, power is correlated to the understating of security and how it is perceived. The theory does not only focus on the power relations between men and women, but rather on how the different structures that globally operate depending on certain political constructions in different societies. For example, Aleksandra Gasztold, an Associate Professor at the Faculty of Political Science in the

University of Warsaw, wrote that there is an intersection between how “militarism and monopolising on organised violence can have a direct impact on how power is distributed and as security is often a field associated with men, this power is disproportionately attributed to men”. (Gasztold, 2017).

The third is framing, which for certain political purposes usually presents facts in a certain way that shows a problem which requires a solution. For example, members of a certain political party might attempt to prioritize some issues in media, ‘frame issues’, in a specific way to make a certain solution comes up for the favor of their own political benefit, which can be seen as the most appropriate course of action available.

2) Research Methodology:

Under the Feminist Security Studies, there is no particular research methodology used due to the several perspectives and unit of analysis that are commonly used within the subfield. These multiple methodologies include: qualitative, quantitative methods, in addition to epistemology claims. However, the most commonly used approach under the theory of feminist security is the qualitative one. Sue Wise, a feminist author, stated that most of the research conducted under the discipline of FSS have used the qualitative methodology (Gerry, 2017).

In addition to the qualitative methodology, FSS also depends on quantitative techniques in the analysis which include the observation of certain statistics in certain security studies and their connection with some outcomes at hand. For example, according to the topic of this research, a comparison between the numbers of women in UN PKOs before and after the UNSC 1325 resolution of 1325 is necessary in showing evidence of the success of women in improving the effectiveness of the UN operations.

This research paper, likewise, will depend primarily on the qualitative approach as the method of research. Gerry (2017) stated that “the qualitative research entails the analysis of varying social and political phenomena within an explanatory and interpretivist lens to provide a holistic perspective”. The next section will focus more on the qualitative approach with an application on the topic of this research.

Within the various research techniques under the qualitative approach, this section will primarily use the following: literature review; discourse analysis; and statistical review which will be the main techniques used to prove how the increase of women in the UN PKOs have an impact on the 11 operations effectiveness as they lead to more gender equality, women empowerment, and framing which lead to the attraction of more women to join the UN PKOs.

Literature Review

Throughout history, several conflicts took place all over the world, leading to the deaths of many human beings, destruction of cities, and failure of some states. Thus far, many military forces have intervened in such conflicts to either prevent them or gain certain political, economic, or even social benefits. This led to the failure of the international community to maintain global peace and find effective solutions.

For that reason, the United Nations Peacekeeping Operations was primarily invented to maintain ceasefires and stabilize situations on the ground, “UN PKO was born at a time when Cold War rivalries frequently paralyzed the Security Council” (United Nations Peacekeeping, official). Given its importance, the UN PKOs is the only international military around the world existing that does not use force, but rather work on achieving peace globally and preventing conflict through the efforts of its own soldiers.

In that context, many questioned the effectiveness of these missions because of the lack of women in its troops. For that reason, the Security Council (SC) passed the United Nations Security Council resolution number (UNSCR/1325) on the 31st of October 2000 to integrate more women (United Nations Official, 2000). Consequently, many participating militaries around the world strived to achieve gender equality and opened more doors for women to join services at home and abroad.

Several scholars have assessed the more integration of women in the UN peacekeeping through different perspectives. Some theorists, notably Alvez (2016); Karm (2017); and Beardsley (2017), 12 explored the relation between the integration of more women in the UN PKOs and the rise of gender equality globally. Alvez (2016) for example analyzed the relation between gender mainstreaming and peacekeeping by simply arguing that gender mainstreaming can only be effective if women themselves were added to development agendas and policy goals.

Karim and Beardsley (2017) similarly emphasized that the more integration of women in the UN PKOs is a: “tremendous opportunity as that the international community is undertaking an ambitious effort to address gender equality in post conflict security provision”. Equally important, it is argued that the contribution of women in the UN PKOs is multifaceted as that the level of security among the local population is increasing due to the direct contact of women in troops with other females (Odanović, 2010).

Rudberg (2023) in addition stated that security interests are enhanced by female participation in conflict prevention and resolution. “Studies have found that a significant inclusion of women and civil society groups in a peace negotiation makes the resulting agreement 64% less likely to fail and 35%

more likely to last at least fifteen years” (Rudberg, 2023).

Another essential point was tackled by some scholars suggesting that the presence of women peacekeepers can have an impact on the behavior of men, “evidence suggests that the presence of women in peacekeeping operations can and does foster a change in male behavior when women are deployed in the PKOs” (Simic, 2010).

Donadio (2019) significantly listed three important correlated factors that contribute to the increase of women in the UN PKOs. Firstly, female peacekeepers can access venues that cannot be easily accessible by men which makes their contribution unique and effective. Secondly, the former will lead to improving intelligence about potential security risks. Which will lead to, thirdly, an effectively improved access to the community members.

Likewise, other scholars emphasized the importance of the increase of women in the peacekeeping operations by not just focusing on the numbers, but rather on the quality of interaction. Rudberg (2023) argued that “evidence strongly shows that it is the meaningful participation of women and not just the number that matters”. In addition, the meaningful participation of women is defined by the “Elsie Initiative for Women in Peace Operations as follows:

“The presence and leadership of women in the UN peace operations, across all ranks and functions, is the meaningful participation of women. Women can participate meaningfully when they contribute to and are included in all aspects of operational and mission planning and decision-making process. When they hold operational command and leadership positions, and non-traditional as well as non-stereotypical roles”. -Elsie Initiative for Women in Peace Operations (2017)

Other scholars demonstrates that women as peacekeepers are more capable than men of cultivating confidence and trust with local communities. Major General Lund, as cited in Rudberg (2023) explains: “if a woman has been gang-raped by men, she will most likely approach a woman in uniform rather than a man, and men that are raped will, I think, also approach a woman soldier than a man”. Kenny (2016) argued, likewise, that “studies have found that an increase in the proportion of women from zero to five percent reduces the expected count of sexual allegations by half”.

Discourse Analysis

This section will analyze some of the speeches of popular politicians who advocate for the increase of female peacekeepers and the impact this will have on the UN PKOs. To begin with, the statement by Karen Van Oosterom on the 11th of April 2019, the Permanent Representative of the Kingdom of the Netherlands to the United Nations in New York was of high importance (Security Council Official, 2019). In light of the UN Security Council Resolution 1325 on Women, Peace, and Security agenda, Oosterom began with praising some of the developed countries on engaging in the initiative of increasing their female peacekeepers:

“Let me start with commending Germany, as well as France, for making the Women, Peace and Security agenda a priority of their presidencies. And Germany specifically for bringing more light and transparency to this august gathering by opening the curtains and its efforts for better timekeeping”. - Oosterom (2019).

One of the most important statements by Oosterom was his recommendation in ‘translating findings into actions’ through which he recommended that some barriers should be brought down in order for the Security Council to achieve

gender equality in the UN PKOs. From his perspective, he stated that this can only be done through the following ways: “Increasing efforts to recruit more women; Appointing national gender advisors; Gender-responsive criteria for deployment; and, Providing adequate camp accommodation and equipment”. Oosterom then concluded with advocating for the increase of female participation in the UN PKOs by stating that:

“In conclusion, improving our missions’ effectiveness through increasing female participation is vital, and crucial to our efforts to modernize UN peacekeeping. Increasing female participation featured prominently in the Declaration of Shared Commitments that we signed up to last year. Let us redouble our efforts - as we pledged - to make it a reality. It is time for us to walk the talk, and let us be inspired by role models like yourself, Madame President”. -Oosterom (2019).

The third pre-deployment training for the Egyptian female peacekeepers was held in collaboration between Cairo International Center for Conflict Resolution, Peacekeeping, and Peacebuilding (CCCCPA) and the Egyptian Ministry of Defense from the 18th till the 22nd of December 2022. This training was of due importance to advance the overall context of advancing the participation of Egyptian female peacekeepers under the Women, Peace, and Security agenda. 15 One of the most important statements on the opening ceremony was by Ambassador Ahmed Abdel-Latif, the director of the CCCCCPA who emphasized that:

“The crucial role played by female peacekeepers in improving the overall effectiveness and performance of UN peacekeeping missions. This includes fostering trust with the local communities, especially with women and children, and helping prevent sexual exploitation and abuse”. -Ahmed Abdel-Latif

(2022)

Tene Maimouna Zoungrana, the first woman to win the first Trailblazer Award, delivered important statements while receiving the award. The UN Trailblazer Award was created in 2022 by the department of Peace Operations aiming to “showcase outstanding women justice and corrections officers who have broken through gender barriers in difficult and dangerous contexts and proven that women are a crucial part of every peace operation’s mandate to create sustainable peace”. (United Nations Official, 2022).

“Together, with all the other women pioneers, we have a responsibility to carry the torch and break down the gender stereotypes, prejudices and barriers against women in the field of corrections and security”. -Zoungrana (2022).

Zoungrana won the award due to her efforts in: 1) crisis leadership, through which she succeeded in the demilitarization of the prison system in CAR and created a women only rapid lead team; 2) banishing stereotypes, under which she stated: “Prison security has long been characterized by stereotypes that have hindered the development of women prison administrators. I am very pleased that today opportunities are given to women to work in prisons, and to perform all roles without distinction, and I feel empowered”.

One of the most interesting findings in this study is the interviews conducted by men who have shown their adequate support to the goal of gender equality in the UN PKOs. These men were holding positions such as military and police advisers, force commanders, and senior-level officers at the United Nations. Dharmapuri (2013) wrote that “this is significant because leaders and especially political and military leaders, play a crucial role in promoting the goals of the UN 16 system, and in generating the political will necessary to execute those goals”. Former secretarygeneral Kofi Annan and former

secretary-general Ban Ki-moon have both called for the engagement of men to promote gender equality and end violence against women. In Annan's words:

“Men, through their roles in the home, the community and at the national level, have the potential to bring about change in attitudes, roles, relationships and access to resources and decision making which are critical for equality between women and men.... Men should therefore be actively involved in developing and implementing legislation and policies to foster gender equality, and in providing role models to promote gender equality in the family, the workplace and in society at large”. -General Kofi Annan

“Men have a crucial role to play in ending such violence—as fathers, friends, decision makers, and community and opinion leaders” -Secretary-General Ban.

A Statistical Review on the Increase of Women in UN PKOs

Before the Security Council Resolution 1325 and the Women, Peace, and Security mandate, only few women served in the UN PKOs. According to the latest reports presented by the international peace institute in addition to the last updated report by the United Nations Peacekeeping Official page, only twenty women served in the peacekeeping missions from 1957 until 1989. Their main position was nurses in some of the medical units in the operations.

Moreover, from 1957 till the late 1990s, “no female military officers were assigned to peacekeeping offices at UN headquarters”. However, by 1993, “women made up to 1% of deployed uniformed personnel and eleven out of nineteen UN peacekeeping missions had significant civilian components and almost one third of civilian staff serving in them were women”. (UN

Peacekeeping Official, 2023).

This number increased, particularly after the UNSC 1325 resolution on Women, Peace, and Security, leading to women in 2020 constituting out of 95,000 peacekeepers “4.8% of military contingents and 10.9% of formed police units and 34% of justice and corrections government-provided personnel in UN Peacekeeping missions”. This shows a great improvement in the recruitment of women in the UN PKOs as that the main 2028 target for women serving in PKOs is as follows: “women serving in military contingents is 15%, and 25% for military observers and staff officers. The 2028 target for women serving in formed police units is 20%, and 30% for individual police officers”. (UN Peacekeeping Official, 2023).

3) Assessment Criteria:

As previously mentioned, and explained, the feminist security theory advocates for the integration of women in any security-related agendas because this might lead to gender equality, women empowerment, and framing of gender issues. This can be linked to the major outcomes presented by the UN peacekeeping official page of increasing female peacekeepers in the UN PKOs. As that more women in peacekeeping contributes to the effectiveness of the operations:

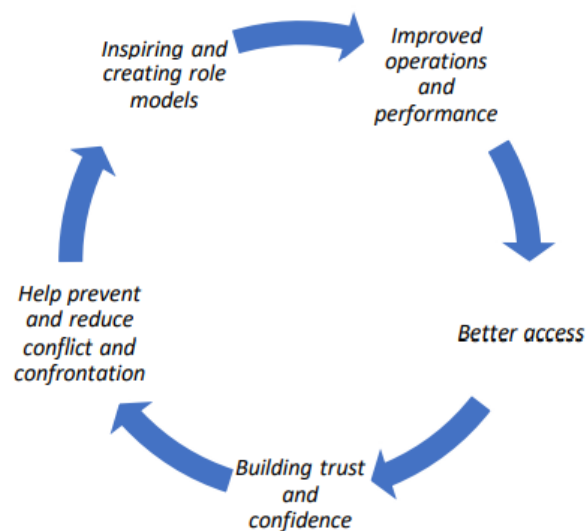
“More women in peacekeeping means more effective peacekeeping. Women peacekeepers improve overall peacekeeping performance, have greater access to communities, help in promoting human rights and the protection of civilians, and encourage women to become a meaningful part of peace and political processes”. -UN Peacekeeping Official (2023).

In 2000, the United Nations has called for an increase of the contribution and

positions of women in the UN PKOs through the UN Security Council Resolution 1325 (UNSCR1325): “In this context, promoting the participation of women, both in peacekeeping and within the societies in which we serve, is at the centre of our efforts” (United Nations Peacekeeping Official, 2023).

18 The criteria listed by the UN PKOs presented can also be analyzed in correlation because each element provided can lead to the other.

The increase of female peacekeepers in the UN PKOs led to: 1) Improved operations and performance, as that gender diversity in the UN PKOs lead to a greater effectiveness and performance of the operations because of the improvement seen in decision-making and planning.



This led to 2) better access, as that female peacekeeper can have a better access and communication to populations and in specific women and children. “By interviewing and supporting survivors of gender-based violence and violence against children-thereby generating critical information that would be otherwise difficult to reach”.

Better access can reflect 3) building trust and confidence, because women peacekeepers can for example be able to communicate with other women in local communities that prohibits women from speaking to men. When trust is built from a UN PKO, this leads to 4) helping in preventing and reducing conflict and confrontation: Improved operations and performance Better access Building trust and confidence Help prevent and reduce conflict and confrontation Inspiring and creating role models

“Diversity in peacekeeping helps to address the disproportionately negative effect that conflict has on the livelihood of women and bring new perspectives and solutions to the table by effectively addressing the needs of women in conflict and post-conflict settings, including those of women ex-combatants and child soldiers during the process of demobilizing and reintegration into civilian life”. -UN Peacekeeping Official (2023)

Finally, 5) Inspiring and creating role models, is the last but not least impact of increasing female peacekeepers and an outcome of the previously mentioned. As that female peacekeeper serve as powerful role models for other girls and women in the host community, this can lead to these females calling for their own rights in their countries and pursuing non-traditional careers such as also working on improving their skills and reaching goals of holding political positions in a security structure or an international organization (UN Peacekeeping Official). In this assessment criteria section, the main outcomes that were explained under the feminist security theory from the integration of women in security related agendas can be integrated with the major outcomes presented by the UNPKOs official website. Firstly, women having better access with local communities in addition to building trust and confidence with women and children in the hosting countries is showing evidence to more gender equality. As that in this case, women in local communities who are facing problems during a conflict or post one can equally share their difficulties without bias and can have the opportunity to open up for

another women with confidence. Secondly, improving the overall effectiveness of the operations can give the opportunity to the female peacekeepers to hold higher positions or for example win awards, this empowers women and open doors for them to have better chances in their careers.

Thirdly, according to the last outcome presented by the UN official, female peacekeepers inspiring other women and becoming their role models is linked to the third outcome presented by the FST which is framing. This integration of women in the UN PKOs brings the topic of women and security to the forefront of medias and this can inspire other women to join the peacekeeping missions or any other security related jobs.

4) Case studies: Bangladesh, Mongolia, and Egypt:

Improved operations and performance

One of the most interesting examples is the Mongolian case study. As that one of the major objectives of the United Nations is to increase the participation of women peacekeepers to protect children and women from violence, Mongolia made a significant contribution, “Mongolia sent more than 800 female personnel for the UN coalition missions and its commitment was timely because it fulfilled its responsibility as a UN Member State”. (Mongolian Institute for Innovative Policies, 2022). The UN peacekeeping official page also stated that the Mongolian efforts in increasing female peacekeepers in the UN operations resulted in a considerable change in the men’s attitudes in the military and strengthened feminist foreign policy.

Better access

On the 7th of January 2023, the Indian Army sent the largest number of female peacekeepers to serve in a UN peacekeeping mission in South Sudan. According to the UN peacekeeping official (2023), the mission successfully reached women and children who suffered from several conflicts occurring: “the female

engagement team (FET) provided a significant assistance to local women and children in one of the most challenging security conditions” (UN Peacekeeping Official, 2023).

Building trust and confidence

During Ghana’s engagement with contributing more female peacekeepers in a UN interim Security Force for Abyei (UNISFA), Ezurah, the commander of the mission, noted that the major responsibility of the mission in addition to the most significant objective is to build trust with the local communities and especially with women and children. “It’s not easy to meet people and all of a sudden want them to open up to you, so my greatest responsibility was to make sure the local population came understand that we were neutral, that we were there for them, that we were seeking their protection” said Ezurah. (UN Peacekeeping Official, 2023).

Helping in preventing and reducing conflict and confrontation

A significant example here can be the “first-ever-all-woman peacekeeping unit in Mali” which was led entirely by Egyptian female peacekeepers for the first time in the history of the United Nations and Egypt. The main objective of the peacekeeping unit was to combat terrorist attacks in Mali and monitor the safety of civilian roads. Major Rana Ghorab, the Egyptian female peacekeeper, was leading this UN Police United team and she worked alongside the “UN Multidimensional Integrated Stabilization Mission in Mali (MINUSMA)”. According to the CCCPA, the major accomplishment of the mission was that they succeeded in addressing some of the major needs of women in Mali.

Inspiring and creating role models

The United Nations Peacekeeping Official published a journal on the 5th of February 2020 titled “Female Bangladeshi peacekeepers inspire the women of Wau to join security forces”. It explained that the female peacekeepers of Bangladesh who served in the UN mission in South Sudan inspired other women

in the local communities that to consider a career path in their country's security forces. During an interactive session on gender equality between the female peacekeepers and the South Sudanese women, the officers shared their personal experiences in the military:

"I was always wondering how women soldiers could go to battlefields leaving behind their husbands, children and family. Today, I have experienced the lives of female peacekeepers who are confidently and comfortably performing assigned tasks with their male counterparts, overcoming all odds and challenges". -Viola Alexandra Umeli, the Deputy Speaker of the Wau Legislative Assembly.

5) Recommendation

Despite the tremendous efforts by the United Nations Security Council in integrating more women in the UN PKOs and even though there has been a significantly proven impact on the operations effectiveness, still some areas should be improved in order to ensure the continuity of women engagement in the UN PKOs. Therefore, this section will briefly provide some recommendations that can help in the improvement of the UNSC 1325 agenda.

The first is the encouragement of the UN member states to involve women more in their military sections and national security departments. This will lead to more trained women on security affairs and the availability of a bigger number of women to join the UN PKOs in case of emergencies without a previous training. The second is the urgent need of establishing a gender-coaching program for the UN military, because still some of the men in militaries are crucial and are challenging the participation of women in security forces. The third is, and most important, is to appoint a gender advisor in the UN PKOs headquarters to quietly address issues related to gender equality, diversity, and/or abuse. The fourth is advancing the social media pages and engaging more with popular TV channels to cover the

considerable efforts done by the female peacekeeper troops in conflict zones; in order to attract other women to join.

6) Conclusion

To conclude, the United Nations Peacekeeping Operations is of high importance due to it being the only international military that does not use violence and rather depends on mediation, conflict resolution, and conflict prevention through non-violent methods. Yet, many crimes and conflicts have been occurring until currently and the international system is still not meeting the expectations of resolving these conflicts. Accordingly, some of the weaknesses should be assessed in order to improve from the UN Security Council's effectiveness in maintaining global peace.

One of the most important issues that came in the front was the lack of women integration in the UN PKOs which led to the release of the UNSC 1324 resolution on Women, Peace, and Security. Yet, in the feminist security studies, and especially under the feminist security theory, this topic was not new. The topic was researched and examined by many feminist scholars who called for the importance of including gender lenses in the field of international security.

Accordingly, the integration of women in security agendas, according to the theory, leads to more gender equality, more women empowerment, and framing of the topic. The increase in the number of women joining the UN PKOs since the date of issuance of the UNSC 1325 resolution is profound evidence on the importance of women integration in an international organization that aims at maintaining peace globally, this was evident in the quantitative study provided in this research. Moreover, the male and female advocated the more integration of women in the UN PKOs with presenting significant reasons and examples. This was also evident in some of the statements and speeches tackled in the qualitative study that was presented in this paper.

Last but not least, the case studies provided in the paper, using examples from Bangladesh, Indian, Mongolian, and Egyptian female peacekeepers have shown that despite the differences in languages, norms, cultures, or even political environments in the local states, they all succeeded in improving the effectiveness of the UN PKOs, building trust with internal communities, helping in preventing and resolving conflicts, and becoming role models for other women, who might be vulnerable in their own communities, to become more empowered and join the UN peacekeeping forces; and help the world become a better place.

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Gender Representation in Egyptian Textbooks: A Critical Analysis of Arabic Language and Qiyam wa Ihtiram Al-Akhar Post-2017 Educational Reforms

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Abstract:

On the national and international level, the issue of gender representation is increasingly being acknowledged as it plays a critical role in understanding social attitudes towards gender. In Egypt, where traditional gender roles are deeply rooted in the society and culture, it is important to examine how textbooks portray gender. In the early 1990s, Egyptian school textbooks were heavily criticised for presenting stereotypical content. However, in 2017, the Egyptian government reformed the curriculum. Concurrently, it launched the National Strategy for Empowering Egyptian Women 2030 (NSEEW 2030), which tackles the educational reforms. NSEEW 2030 clarifies that, through educational reform, the Egyptian government aims to present gender-sensitive content and empower Egyptian women.

This study aims to address two related objectives. First, it aims to explore gender representation in two subjects: Arabic and Qiyam wa Ihtiram Al-Akhar textbooks at the primary stage. For instance, it explores how gender roles are portrayed in the textbooks. Second, the study aims to Assess to what extent NSEEW 2030 conform with the content of the textbooks. It focuses on NSEEW 2030. The research explores several questions, including: “Does the content of the Arabic language and Qiyam wa Ihtiram Al-Akhar textbooks in Egyptian schools encourage males and females to engage in non-traditional occupations and activities?”

The research uses the Arabic and Qiyam wa Ihtiram Al-Akhar textbooks

as primary sources. To reach results, the study uses qualitative and quantitative content analysis. To effectively analyse the content, it uses a toolkit provided by UNESCO, which provides a framework to analyse gender representation and facilitates the identification of gender stereotypes and biases that can exist in textbooks. Thus, it can facilitate the development of gender-sensitive content. The study paves the way to the improvement of the Egyptian education towards being more gender sensitive. By examining the content of these textbooks, the research identifies areas where gender equality could be promoted.

I. Introduction

Since early age, children grasp the notion of gender through different channels. The school, being one of the agents of socialisation, plays an important role in shaping understanding of gender. Undoubtedly, the content of the curriculum can perpetuate ideas regarding gender equality or inequality among students. For instance, if men are portrayed as more responsible, rational, and courageous, it would encourage young boys to think and act in a controlling manner. As they age, the students follow what they have been socialised into. Likewise, through absorbing stereotyped information provided in the school textbooks, women might view themselves as emotional, weak, and dependable. Thus, gendered school curricula can negatively affect the psychological well-being of the students and their understanding of gender. Gendered content not only affects the psychological well-being of students, but also their future. Gender stereotyping in education materials can impact how individuals view their roles as well as others' roles in the society. School curricula can either encourage or discourage the individuals to view themselves as active members in the society. As Bachore (2022) clarified, school textbooks can impact

the motivation and life choices of the individuals (p.176). For instance, in many cases, both males and females might make choices based on what they were taught in early stages of education. Both genders can be socialised into thinking of occupations in a gendered manner. For instance, in Egypt, compared to girls, it is more common for boys to aspire to be policemen. Since it is common to see pictures and stories of males who are portrayed as policemen, children view this specific occupation as more suitable for males.

As clarified above, gendered content can shape the individuals' psychological well-being, understanding of gender, and life choices. Likewise, gendered content can marginalise the status of women in the society. UNESCO clarified that gender stereotyping is prevalent in education materials, which creates what can be referred to as a "hidden barrier to equality between men and women" (Colvin, 2016). Gender stereotyping in educational textbooks can convey gendered messages which are translated into beliefs and even actions. As UNESCO (2016) clarified, "textbooks convey not only knowledge but also social values" (p.1). According to UNESCO (2016), many studies show that the underrepresentation of the image of women in the teaching textbooks in many countries -including Pakistan, Uganda, Zimbabwe, and Spain- perpetuates the marginal status of women in the society (p.12). In many countries, women are not included in images, stories, or examples in educational textbooks. When women are included, they are depicted in submissive and traditional roles limited to the housework where they serve their husbands, sons, or brothers. Gendered roles in the textbooks can disempower women if they instil discriminatory ideas.

Having clarified the significance of gender representation in educational materials, the paper examines, analyses, and evaluates

Egyptian school textbooks. It focuses on Arabic and *Qiyam wa Ihtiram Al-Akhar* at the primary level.

The paper is divided into eight main sections. The first section presents the issue of genderrepresentation in the Egyptian context post-2017 educational reforms. It clarifies previous effortsin Egypt to formulate non-gendered textbooks. Likewise, it presents the NSEEW2030, which waslaunched in 2017. The second section briefly clarifies the questions and purpose of the research. The third section identifies the strands of the literature on gender representation in educational textbooks. Moreover, it clarifies the gap in the literature. The fourth section sheds light on the theories that guide the research. The fifth section clarifies the research methodology. The sixth section presents the discussion and analysis of the research. Similarly, the seventh section presents the findings and recommendations of the research. Finally, the eighth section presents recommendations..

A. Gender Representation in Egyptian Textbooks

B. Previous Efforts in Egypt

In Egypt, gender equality in education is improving. School enrolment of girls is steadily increasing since 2011 (World Bank, 2022). However, many scholars, such as Islam & Asadullah (2019), clarified that education can work as a tool of disempowerment when the curriculum is gender biased.

Egypt is a state member to the most important international treaties such as The Committee on the Elimination of Discrimination against Women (CEDAW) and The Beijing Declaration and Platform for Action (BDPA). Both treaties highlight the importance of taking actions to eliminate gender stereotypes in educational materials. Although Egypt ratified international treaties regarding gender equality since the

1980s, it was clear that it continued to present stereotyped content in the textbooks.

In a periodic report submitted by Egypt to CEDAW in 1994, Egypt clarified that all the authorities of the state are required to comply with “the principle of equality between men and women as embodied in article 40 of the present Constitution” (CEDAW, p.8, 1994). Likewise, the report clarified that the Ministry of Education modified the curricula with the intention to eliminate “stereotyping of roles on the basis of gender and in order to ensure that family education includes a proper understanding of the roles on men and women in the family and of motherhood” (CEDAW, p.26, 1994). The report aimed to tackle different areas where Egypt promoted women rights, which was a positive step. However, although the report seemed to address the issue of gender stereotyping in textbooks, mentioning “proper understanding” in the report is controversial and can be interpreted as content that reinforces traditional gender roles and stereotypes. In other words, the “proper understanding” of gender differs from one country to another. In the Egyptian context, especially in the previous era, using this phrase might imply that policymakers reformed the textbooks in a way that reinforce gender stereotypes as it complies with the proper understanding of the society and culture. Therefore, while the report might seem like a positive step towards achieving gender sensitive curricula, more effort was required to avoid reinforcing gender stereotypes.

C. Post-2017 Strategy: The National Strategy for Empowering Egyptian Women

2030 (NSEEW 2030)

As clarified above, in the past decades, representation, and

portrayal of gender roles in the Egyptian textbooks showed stereotyped content. However, lately, the Egyptian government have been focusing on women empowerment. Since 2017, the efforts of the government to empower women has been noted. Three initiatives can highlight the political will to empower women. First, President Abdelfattah El Sisi announced 2017 as “the year of Egyptian women”. Second, in a similar light, the government launched the National Strategy for the Empowerment of Egyptian Women 2030 (NSEEW 2030) in 2017 (NCW, 2020, p.1). NSEEW aims to empower women politically, economically, and socially. In the educational sector, the government aims to reform the system in a way that changes the discriminatory images and negative portrayal of women in the textbooks. Third, in 2017, the Egyptian government started reforming the educational system. The reforming of the curricula aims to provide the students with life skills that positively shape and develop their personality, intellectual capacity, and behaviour. The government focused on reforming the curricula of the primary level as it is a foundational stage. It aims to formulate the content to be more gender sensitive.

The Egyptian government developed “The National Strategy for Empowering Egyptian Women 2030” as a clear and comprehensive strategy that aims to **eliminate gender stereotypes** in the textbooks and curricula. NSEEW 2030, as a comprehensive strategy, aims to empower women in the political, economic, and social areas. Moreover, it aims to “**change the mental picture of women within the society** and promote their access to legal rights” (Human Rights Studies, p.21, n.d). NSEEW 2030 aims to develop women’s confidence, self-appreciation, belief in their capabilities and their capacity to control their own lives. Likewise, it aims to empower

women and encourage them to **make positive contributions to the society** and contribute to social change. The Egyptian National Observatory for Women clarifies that NSEEW 2030 aims to “change the culture of the society and **challenge the stereotypes of women**” (ENOW, n.d).

It is remarkable that, in 2020, the government added “*Qiyam Wa Ihtiram Al-Akhar* Values and Respecting Others” as a subject to be taught from the first to the sixth grade. According to NSEEW 2030, the new and reformed curriculum is expected to deliver non-stereotypical images of women. Through the textbooks, the Egyptian government aims to “support the concept of gender equality and women empowerment and to establish the culture of non-discrimination” (NCW, 2017, p.31).

II. [Research Questions and Purpose](#)

A. Research Questions

Given the vitality of the issue of gender stereotyping in educational materials, this research focuses on the following question: “To what extent the Egyptian textbooks adhere to NSEEW 2030?”

The research also aims to explore the following questions: “In which ways gender is represented in the Arabic and *Qiyam wa Ihtiram Al-Akhar* primary textbooks in Egypt?” Specifically, it aims to explore the following question: “Does the content of the Arabic language and *Qiyam wa Ihtiram Al-Akhar* textbooks in Egyptian schools encourage males and females to engage in non-traditional occupations and activities?” To address this question, the research uses a toolkit provided by UNESCO in a document titled “Mainstreaming Gender Equality in Curricula and Teaching and Learning Materials.”

B. Research Purpose

This research aims to present two related objectives. First, it aims to explore and investigate the issue of gender representation in Egyptian textbooks in light of NSEEW2030. It focuses on the Arabic and *Qiyam wa Ihtiram Al-Akhar* textbooks, which underwent reforms in 2017. The paper examines to what extent NSEEW2030 guides the educational reforms and the content of the textbooks. As it tackles clear goals, this paper aims to analyse whether NSEEW2030 is effectively implemented or not. Second, besides investigating the issue of gender representation in the mentioned textbooks, the research aims to explore the category into which the textbooks can fall. As will be clarified, textbooks can fall into three categories. Certainly, the textbooks can fall between two categories.

C. Research Argument

The research argues that although the Egyptian government reformed the curriculum, the textbooks continue to show mixed portrayal of women. The textbooks do not fully adhere with the NSEEW 2030. For instance, although the textbooks of *Qiyam Wa Ihtiram Al-Akhar* presented gender-sensitive content, the Arabic textbooks still show gendered and stereotypical portrayal of women.

III. Literature Review

The literature on the issue of gender representation in textbooks is divided into three strands: (1) Gender-Blind & Reinforcing Stereotypes (2) Gender-Sensitive (3) Gender Transformative. This section clarifies how the classification of the Egyptian school textbooks has changed over time. As will be clarified in this section, over time, the classification of the educational materials in the Egyptian education has varied.

A. Gender-Blind Textbooks & Reinforcing Stereotypes

In the literature of gender representation in textbooks, gender blindness refers to the case where the issue of gender equality is ignored. In a report in 2021, UNESCO (2021) clarified that “countries are still falling short of developing textbooks free of gender stereotypes” (p.2). In some cases, textbooks are not only gender blind, but they also reinforce gender stereotypes. For instance, in the early 2000s, the Egyptian educational textbooks included stereotypes of women, which contribute to the persistence of gender stereotypes (Abdulghaffar 2009, p.26). They highlighted the different and expected roles for both males and females. Some scholars in the early 2000s, such as Abdulghaffar (2009), noted that the educational textbooks in Egypt convey sexist images of women, which affected the beliefs of the students (p.26). The textbooks instilled beliefs that foster discriminatory ideas towards women. Moreover, they constructed gender-roles where women are portrayed as care givers, emotional and dependent. In the stories, women were not only depicted in traditional and stereotyped roles, but also as weak compared to men. For instance, in the stories that are included in the textbooks, children are taught to view males as more powerful.

B. Gender-Sensitive Textbooks

Unlike the previous strand, this strand supports avoiding and eliminating gender stereotypes in the textbooks. Scholars under this strand believe that the status of women is negatively impacted through the gendered representations of women in the textbooks. Thus, they stress on the importance of portraying males and females in equal terms. As mentioned before, the National Council for Women (2017)

highlights that the Egyptian government aims to present gender sensitive content in the educational textbooks (p.31).

Avoiding gender stereotypes clarifies that the governments are committed to the goal of presenting gender-sensitive content in the textbooks. Some countries not only avoid and eliminate gender stereotypes, but also reform the content in a way that reflects equality. Vietnam is an example where the government reformed the curriculum in a way that reflects equality between males and females. They changed the stereotypical images and replaced them with images that highlights equality between men and women. Unfortunately, as UNESCO (2020) clarified, countries around the world are still not showing satisfactory results even after reforming the content of the textbooks.

C. Gender Transformative Textbooks

As the previous strand clarifies, scholars believe that textbooks should promote gender equality through reforming the curriculum in a way that eliminates gendered beliefs. Some policymakers and scholars went further by suggesting that education should be viewed as a tool that can empower women. They believe that textbooks should be reformed in a way that transforms the traditional understanding of gender, which can be harmful in some cultures. They aim to reform the curriculum in a way that empowers women to play an active role in the society. For instance, as mentioned earlier, NSEEW 2030 in Egypt is committed to reform the education in a way that enhances the status of women and change the norms and culture that discriminate against women (NCW, 2017, p.6). It is committed to enhance the status of women and change the norms and culture that discriminate against women (NCW, 2017, p.6). In NSEEW 2030, it is stated that the

government aims to eliminate gender stereotypes, encourage women engage in the society, and change the mental image of women in the society (NCW, 2017, P.57).

Filling the Gap

Although the issue of gender representation in textbooks is worth analysing, limited research focuses on the content that is being delivered in the Egyptian school curriculum. The available literature presents the reforms that took place. It focuses on the efforts of the Egyptian government in reforming the education. However, the current literature does not analyse the content itself. Thus, this research aims to fill this gap through presenting critical analysis of the content of the Egyptian textbooks. As earlier mentioned, it focuses on the Arabic and *Qiyam Wa Ihtiram Al-Akhar* textbooks in the primary stage.

IV. Theoretical and Conceptual Framework

A. Socialisation

The theory of socialisation stresses on “the importance of childhood learning” (Kelly, 1986, p.5). Socialisation affects the individuals’ outlook towards themselves and how they view themselves as a part of the wider society. Through socialisation, individuals gradually recognise their role in the society. Political scientists and feminists give a considerable attention to the concept and process of socialisation. They focus on the relationship between socialisation and gender. The main focus is on how women are socialised into specific ways of life. For instance, women are sometimes depicted as if they are weak, and their existence should be confined to the domestic sphere only. Likewise, men can be socialised to view themselves as more powerful and can perform various activities in the public sphere. Viewing the process of socialisation from a

feminist lens is beneficial since the process reflects on the condition of the society. When individuals internalise what they have been socialised to, they act according to what they were taught.

The theory of socialisation is highly relevant to this study as it explains how individuals acquire values, beliefs and thoughts that are accepted by the society through different institutions such as the school. Individuals are taught and socialised into certain ideas and behaviours that are considered as appropriate in the society. Similarly, they are taught the way in which males and females are expected to act and even think.

B. Gender and Development (GAD)

Unlike the theory of socialisation, Gender and Development (GAD) not only explains the reasons behind gender inequality, but also provides solutions to tackle it. Moreover, as an approach, it encourages the researchers to critically analyse the content of the textbooks through analysing gender roles, stereotypes, and power relations.

GAD clarifies that gender relations are socially constructed. Thus, it calls for “addressing the inequalities that are embedded within gender relations” (Falkowska, 2012, p.28). GAD asserts that the relationship between men and women are based on power relations. Thus, the patriarchal nature of the society works to advantage men since they are seen as those who have more power. GAD analyses how women are subordinated in diverse ways including associating them with certain attributes (Falkowska, 2012, p.28).

For GAD, since the government plays a role in regulating the curricula and content of the textbooks, they are expected to promote gender equality. It asserts that government policies should ensure gender equality and reform the education in a way that eliminates

gender stereotypes. For instance, while formulating curriculum, the government should avoid presenting biased representations of women in the textbooks. GAD analyses the internal processes that take place in the organisations including schools. For instance, it asserts that:

“Simply enrolling girls in schools is not a solution for prevailing gender inequalities. Girls’ sense of second-class citizenship may be reinforced by the school environment, where the curriculum or teacher attitudes perpetuate sexist stereotypes, or where there is a lack of female role models” (Falkowska, 2012, p.32)

V. Methodology

As the paper aims to analyse how gender is represented in the Arabic and *Qiyam wa Ihtiram Al-Akhar* subjects that are taught in Egypt, it uses primary and secondary sources. It conducts qualitative research. To analyse the content of the Egyptian textbooks as a primary source, the research uses qualitative content analysis as a method, which is widely used in gender studies and research.

The goal of qualitative content analysis is to gain a deeper understanding of the phenomenon that is studied through exploring the meaning of the data. It enables the researcher to analyse the content and figure out the latent meaning behind the texts as well as images. As a qualitative method, it is used to identify themes and patterns of images and texts. In this method, texts are referred to as “messages” as they convey meanings (Matthews & Ross, 2014, p.394). The researcher interprets the content of the data that includes texts and images.

To analyse the content, the research uses a toolkit provided by

UNESCO. Along with highlighting the importance of equal gender representation, it provides strategies to evaluate and identify gender bias in textbooks. Moreover, it provides recommendations to reduce gender bias and promote gender equality. The toolkit of UNESCO could work as a guideline while assessing and analysing how women are portrayed in educational textbooks (UNESCO, n.d, p.7-9). It helps in deconstructing the issues and major questions. As mentioned earlier, this study focuses mainly two key points. It analyses the nature of female and male characters who are engaged in different activities and occupations.

VI. Analysis

In Egypt, it is generally accepted that gender roles are clearly defined. Societal expectations encourage both males and females to seek certain jobs and activities. Unlike females, males are expected and encouraged to seek jobs. According to World Bank (2022), compared to men, Egyptian women do not participate actively in the labour force due to many factors including the “restrictive gender norms”. When women seek jobs, they lean more towards being in a safe work environment. In Egypt, “safe environment” does not necessarily refer to avoiding harsh conditions. Rather, it refers to workplaces that might include engaging with males. For some females, working with males in some jobs might not be safe as harassment in the workplace is common. For instance, in some areas in Egypt, nurses face the problem of sexual harassment in their workplaces.

Besides facing obstacles in the workplace, it is widely accepted that women might not seek jobs because taking care of the household should be their priority. Interestingly, a study by Abdul Latif Jameel Poverty Action Lab (J-PAL) -which is funded by the World Bank- was

conducted to measure to what extent the burden of childcare can affect the lack of women's engagement in the labour force. It is widely assumed that women do not prefer to work as they carry the burden of the children. Thus, J-PAL granted childcare subsidies to families in addition to facilitating job vacancies and providing employment services through a platform. Only 13.9% applied for jobs. According to the study, women who did not apply for a job had different reasons. "The most common reasons they stated were that their husband refused, not wanting to work...unmatched preferences for job characteristics" (World Bank, 2022). Moreover, women who considered using the platform chose limited and specific jobs. Very few women applied for driving, delivery services, outdoor sales, agricultural, and industrial work. The majority of those who applied for jobs were willing to work in the public sector and preferred administrative work. Thus, according

to the study of J-PAL, Egyptian women face societal barriers to employment. The fact that they are expected to dedicate their time to homework is not the only barrier. Rather, social norms limit the engagement of women in the labour market as well as their choice of occupation. Thus, the study recommends to "simultaneously tackle a host of constraints, including not only the cost of childcare and employment services, but also gender norms" and other barriers (World Bank, 2022).

As the study of J-PAL clarifies, it is important to analyse the stories in the Egyptian textbooks as they socialise children into thinking of gender in certain ways. The following sub-sections analyse how both males and females are portrayed in Arabic and *Qiyam wa Ihtiram Al- Akhar* textbooks while focusing on the occupations and activities

performed by males and females. Based on the nature of the Egyptian society, the research classifies the occupations and activities of males and females into “traditional” and “non-traditional”. Subsequently, the research explores and analyses to what extent the content of the textbooks attempts to challenge the prevalent gender stereotypes and transform the restrictive traditional conception of gender.

1. [Occupations](#)

1.1 Traditional Occupations in Arabic Textbooks

It has been noted that the Arabic textbooks depict women in traditional occupations. In other words, women are portrayed in occupations that conform to the expectations of the society. As mentioned earlier, in Egypt, women are expected to work in safe environments. In the Egyptian society, some professions are traditionally dominated by males while others are dominated by females. It is more common for males to engage in work environments that require extensive social interaction, exposure, and working in harsh conditions. Females, on the other hand, as clarified in the study of J-PAL, engage in less harsh environments. The textbooks did not present pictures that portray females in non-traditional occupations.

The common and typical stereotype is portrayed in the Egyptian textbooks. For instance, males are depicted as farmers in various images. Males are not only portrayed in more harsh and dangerous work environments, but also in high status and prestigious occupations such as engineering, aviation, science-related fields, and medical occupations. The stories encourage the boys to aim for prestigious occupations. For instance, In the second grade Arabic textbook, the

story “I want to be a doctor” revolves around a boy who aspires to become a doctor like his uncle, who is portrayed in a medical suit. Likewise, another story portrays the male character as a pilot. Females, on the other hand, are not portrayed in various and prestigious occupations.

1.2 Equality in Occupations in Arabic Textbooks

Although the Arabic textbooks did not present women in non-traditional occupations, they show a degree of equality in the educational field. Unlike the medical field, the Arabic textbooks show some equality between males and females in the educational institutions. In the story “I can”, both males and females are portrayed as teachers. Likewise, in many stories, both males and females are portrayed as students. For instance, the stories “I love my country”, “finding a partner”, “I have a talent” depict both males and females as teachers and students. However, it has been noted that males appear as school principals, while females are depicted as teachers only. Thus, clearly, in the Arabic textbooks, men dominate the leading positions.

1.3 Traditional and Non-traditional Occupations in *Qiyam wa Ihtiram Al-Akhar* Textbooks

In the textbooks of *Qiyam Wa Ihtiram Al-Akhar*, like Arabic textbooks, women are depicted in traditional occupations. For instance, women are depicted as teachers, which is considered as a safe option for females. Moreover, they are depicted in aesthetic occupations -such as art and music teachers- which is considered as a stereotype. Women are viewed as artists since art is widely considered as feminine. Physical education teachers, on the other hand, are mostly males as they encourage them to engage in sports. Such distinction is clear in the textbooks. For instance, in the story “the beautiful flowers”, the

female art teacher teaches female students how to draw a flower.

In the textbooks of *Qiyam wa-Ihtiram Al-Akhar*, females are portrayed as teachers and students only. Males, on the other hand, are portrayed in various average as well as prestigious occupations. Females are not portrayed in any job other than teaching. Males, on the other hand, are portrayed in other job settings. For instance, they are portrayed as engineers, doctors, and workers. However, although females are expected to perform different kinds of administrative work, males are portrayed as librarians in the story “Ana aqdar/I can.”

In general, compared to the Arabic textbooks, *Qiyam wa-Ihtiram Al-Akhar* do not focus on presenting males and females in specific occupations. To further clarify, when analysing the occupations, it is evident that the textbooks do not intend to instil specific gender stereotypes as they do not focus on constantly portraying either males or females in work environment/costumes. Although females were portrayed as teachers only while males were depicted in other occupations, the textbooks do not seem to repeatedly present either males or females involved in work.

2. [Activities](#)

2.1 Traditional Activities in Arabic Textbooks

Through analysing the Arabic textbooks, it has been noted that males and females are portrayed in various traditional activities. A lot of stories conform to the prevalent stereotyped activities of males and females. For instance, in the Arabic textbook, a story titled “let us farm” portrays males in an outdoor setting where a farmer is teaching a boy how to farm. The boy seeks to learn issues related to gardening. Likewise, the story “the Nile waters the farms” revolves around the daily activities of a father and son. In the story, they visit their farm daily and

help each other in gardening. The textbooks present an equally prevalent stereotype related to the hobbies where males are expected to be more athletic. In the textbooks, males are usually depicted playing football. In the stories “our friendship is more important”, “I can”, and “we want to play”, the textbook shows groups of boys playing football. Similarly, in “I am strong” story, boys are depicted in a marathon.

Clearly, in the Arabic textbooks, males are portrayed in outdoor settings where they practice activities. Females, on the other hand, are portrayed in indoor activities more than males. When females are portrayed in a trip, they are portrayed with family members or trusted groups. Males, on the other hand, are portrayed as solo travellers. The stories “Salem the adventurer” and “mid-year break” portrays a boy who travels around the world alone. A similar story, “bamboo forests”, travels to explore the forests alone. A similar story, “trip to the camp”, shows a group of friends exploring a desert in a camping trip. It is important to note that the story do not include any female character. In addition to traveling with the purpose of exploring, the textbooks show male characters who travel to pursue their dreams and achieve success. For instance, the story “returning favours”, a boy listens to his uncle as he narrates his journey of pursuing PhD degree from London.

Clearly, in the Arabic textbook, males are portrayed in different settings and participate in diverse activities. Males are portrayed as those who possess and seek knowledge. They are depicted in stories where they research, read, write, and even conduct scientific research. Females, on the other hand, are portrayed in limited activities. Females are usually portrayed as art enthusiasts who enjoy drawing, painting, cooking, or making hand crafts. Thus, besides making activities in an indoor setting, females are affiliated with leisure activities only. Thus,

the Arabic textbooks conform to the traditional and gendered activities.

2.2 Non-traditional Activities in Arabic Textbooks

Although the Arabic textbooks show traditional and stereotypical portrayal of gender, they also show non-traditional images and texts. For instance, in the first grade Arabic textbook, a story titled “honey cake” overcomes prevalent stereotypes. It clarifies that, like girls, boys learn to cook. Moreover, it depicts the whole family in an outdoor and indoor settings where they went to buy ingredients for the recipe and returned to the kitchen to cook. Overall, in this story, family partnership is equal. Both parents, along with their son, are sharing in roles that are usually stereotyped and confined to females in the Egyptian society.

2.3 Traditional Activities in *Qiyam wa-Ihtiram Al-Akhar*

Like Arabic textbooks, *Qiyam wa-Ihtiram Al-Akhar* textbooks depict males and females in traditional activities. For instance, females are portrayed cooking in the kitchen. Moreover, they are portrayed performing artistic activities such as singing, painting, and drawing. Like the Arabic textbooks, in the textbooks of *Qiyam wa-Ihtiram Al-Akhar*, compared to boys, girls are not portrayed as independent individuals. For instance, while boys are portrayed independently in school trips, girls are portrayed in outdoor settings where they are accompanied with trusted groups and/or individuals. For instance, the story “Motaa’assefa/Sorry” stresses on the idea that girls should not participate in outdoor activities without the

presence of their mothers.

2.4 Non-traditional Activities in *Qiyam wa Ihtiram Al-Akhar* Textbooks

While *Qiyam wa-Ihtiram Al-Akhar* shows females in traditional activities, it is highly evident that it portrays males and females in various non-traditional activities. It presents remarkable non-traditional images of activities performed by both males and females.

As clarified earlier, the Arabic textbooks show stereotyped images of males playing sports

-especially football- while limiting females to more artistic activities. The textbooks of *Qiyam wa-Ihtiram Al-Akhar*, on the other hand, portray females performing non-traditional activities. In many pictures, females are portrayed playing football and handball, which are usually associated with males. Similarly, in a story, both males and females are depicted playing football in the same picture.

Like females, males are portrayed in activities that are usually associated with females. In the textbooks, males are engaged in aesthetic activities that are usually associated with females such as painting and photographing. Likewise, in the textbooks, males are pictured in indoor settings where they share in house chores such as cleaning and cooking. More interestingly, the textbooks present a story where the characters are the father and daughter only. In the story, the father takes over the role which traditionally falls under the responsibility of women. The story portrays the father preparing meals and directing his daughter to change her clothes. The images show the father in apron in the kitchen and the text reads “change your

clothes until I prepare the pie, Mai.” Likewise, it reads “we should keep the house clean.” Thus, clearly, the textbooks transform the traditional and prevalent understanding of gender roles in the Egyptian society.

2.5 Equality in Activities in *Qiyam wa Ihtiram Al-Akhar*

In addition to traditional and non-traditional activities, the textbooks of *Qiyam wa-Ihtiram Al-Akhar* present images that show equality. For instance, the textbooks show both males and females engaging in activities that are associated with men such as farming. Similarly, in a story, it shows both males and females involved in grocery shopping, which is usually considered as the responsibility of mothers/females. It shows a father, aunt and son picking and packing fruits. In another story, both the father and mother prepare the food and set the table for dinner. In the textbooks, both males and females are engaging and sharing in different house chores such as cleaning and cooking.

VII. Discussion, Findings and Recommendations

Notably, the textbooks reflect the reality. According to the 2020 Global Gender Gap Report, only seven percent of women hold managerial roles. In the textbooks, women are not encouraged to work in diverse occupations. Obviously, this is not to suggest that Egyptian textbooks determine the fate of Egyptian women. It is important to note that the content of education is not the only barrier that limits the ambition of girls and women. Rather, there are several factors that limit women from playing an active role in the workforce. As UNICEF

clarified, in Egypt, women are discouraged to work due to several factors. In the private sector, for instance, career progression, wages and sexual harassment are prevalent. Moreover, females might not have diverse work options as males do. In the case of Egypt, desirable work conditions for females include occupations with low risk of sexual harassment and suitable working hours (UNICEF, p.4, 2021).

The research recognises the effect of various factors on the understanding of gender and status of Egyptian women. In other words, besides school textbooks, various factors affect the individuals' understanding of gender. Yet, the research is dedicated to analysing gender representation in Egyptian textbooks. Likewise, it aims to assess the textbooks in light of the NSEEW2030.

(Table 1) directly answers the first question that the research aims to answer -“to what extent the Egyptian textbooks adhere to NSEEW 2030?”-. It shows the goals of NSEEW 2030 and suggests to what extent the textbooks fulfil them. Similarly, (Chart 1) answers the second question-“Does the content of the Arabic language and *Qiyam wa Ihtiram Al-Akhar* textbooks in Egyptian schools encourage males and females to engage in non-traditional occupations and activities?”-. Through illustrating a spectrum, it clarifies the three strands of the literature on gender representation in textbooks. It also clarifies whether the content is non-traditional and transformational or not. The chart suggests where one can situate the Arabic and *Qiyam wa Ihtiram Al-Akhar* textbooks.

In the case of Arabic textbooks, one can claim that the content

falls within the first and second categories -gender-blind and gender-sensitive-. Yet, they lean a little more towards the first category. Although the Arabic textbooks acknowledge that women have the right to work, they portray them as teachers only, which is considered as a traditional job for females in Egypt. As for the activities, the Arabic textbooks show gendered images of males and females engaging in different activities. In the case of *Qiyam wa Ihtiram Al-Akhar* textbooks, one can suggest that they can fall between the second and third categories -gender-sensitive and transformative-. They lean more towards the third category. In the activities, the textbooks of *Qiyam wa Ihtiram Al-Akhar* show males and females in equal terms. Moreover, they portray both genders in non-traditional activities.

Overall, after analysing the content of Arabic and *Qiyam wa Ihtiram Al-Akhar* -as clear in the tables and chart- the findings of the research demonstrates and asserts that, even after the educational reforms, they continue to show mixed portrayals of gender representation. Having clarified the content of the textbooks in the previous section, one can refer to two positive aspects and as well as three negative aspects. Through highlighting the three negative aspects, the research aims to improve the content of the textbooks.

A. Positive Aspects

Through analysing the textbooks, it has been noted that, first and most importantly, the textbooks of *Qiyam wa-Ihtiram Al-Akhar* present transformational content. Compared to the Arabic textbooks, *Qiyam wa-Ihtiram Al-Akhar* textbooks are more gender-sensitive and even encourage females to participate in non-traditional activities.

Likewise, the content shows males engaging in non-traditional activities. Thus, one can claim that *Qiyam wa Ihtiram Al-Akhar* presents a transformational content. It transforms the traditional image and understanding of gender-roles.

Second, since the Egyptian generations continue to inherit stereotypes of the occupations and activities of genders, it could be expected that the textbooks would present the traditional and prevalent understanding of gender roles. However, the textbooks did not present some expected traditional portrayals. Contrary to what is expected, the traditional and stereotypical portrayal of women cooking is not prevalent in the textbooks. As UNESCO clarified, while revising and reforming the curricula to be more gender-sensitive, authors should take many factors into consideration. Showing equality in participating in house chores is an important factor (UNESCO, 2021, p.89). The report stresses on showing images of both fathers and mothers sharing in house chores such as preparing meals, cleaning, and taking care of the children. The report praises the efforts of Vietnam where the authors added a picture of a female character as well as a male character preparing a meal. As earlier clarified, similar pictures are found in the *Qiyam wa-Ihtiram Al-Akhar* textbooks.

B. Negative Aspects

As mentioned before, one can note that the textbooks can improve through considering three areas. First, the Arabic textbooks show traditional activities and occupations of male and female characters. They do not encourage women to engage in non-traditional professions or activities. Moreover, females are portrayed in limited activities and occupations. For instance, females practice artistic

activities only while males engage in other activities such as gardening, travelling, and educational activities. Likewise, females are depicted as teachers only while males are portrayed in diverse occupations.

Second, it is important to note that the Arabic textbooks portray men as those who possess higher positions. For instance, they constantly portray males as school principals while females are portrayed as teachers. The Arabic textbooks show clear examples of successful males in their career paths. A direct example that clarifies how the textbooks can encourage children to think of some occupations as related to males can be found in a story where a doctor is interviewed in a radio channel. The story titled ‘live interview’ depicts the interviewee as a male scientist who discusses issues related to the renewable energy. In the story, the male scientist has an audience who attend the show which is aired on television channels. Moreover, as mentioned earlier, males dominate the high-status professions. Females, like males, should be depicted in the medical and other prestigious fields with leading positions.

Third, and most importantly, in many instances, stereotypical content appears in the textbooks in a clear form through using biased pronouns. Obviously, titles can convey messages. Unlike the English language, in the Arabic language, gender is easily and clearly identified in the texts. For instance, “I am an Engineer” can be written in both masculine and feminine forms. The title in the Arabic textbook “Ureed an akoun tabeeb/I want to be a doctor” is written in a masculine form, which invites the children to think of the medical occupations as related to males. In this case, as suggested by UNESCO, the title could have been developed in a way to avoid being biased. Through reforming the title in the plural form, the story can be more gender inclusive. In Arabic,

gender neutral pronouns would decrease gender stereotypes. Thus, in this case, “Nureed an nakun attebaa” instead of “Ureed and akun tabeeb” would be more gender sensitive.

The research recommends reviewing and modifying pronouns to ensure that they are gender sensitive. Moreover, in an attempt to change the gendered conception of occupations as well as to inspire females to seek non-traditional occupations, the research encourages the policymakers to portray females in various work settings. Clearly, *Qiyam wa Ihtiram Al-Akhar* presents gender-sensitive and even transformational content. However, instead of avoiding work environments, it would have been more empowering to present males as well as females in traditional and non-traditional occupations. Likewise, the research encourages the reformation of the Arabic textbooks to present equality between males and females in both occupations and activities. (Table 2 and 3) illustrate the degree of representation of males and females in both textbooks in the occupation and activities.

VIII. Conclusion

To conclude, the research highlights the importance of equal gender representation in educational textbooks. As the theory of socialisation clarifies, individuals are socialised into ideas through agents of socialisation including schools. WAD, as an approach, highlights that many institutions, including schools, can perpetuate gender stereotypes as they are dominated by males. It stresses on the importance of reforming the content of textbooks in a manner that shows gender equality.

The research focuses on the case of Egypt after the reforms that

took place in 2017, which is still under-researched. It focuses on NSEEW2030. In the early 2000s, Egypt presented stereotypical images, texts, and understanding of gender. In 2017, the Egyptian government launched NSEEW 2030, which aims to eliminate gender stereotypes in school textbooks. Moreover, it aims to encourage women to engage and make positive contributions to the society.

Through content analysis, the research analyses the Arabic and *Qiyam wa Ihtiram Al-Akhar* textbooks at the primary level. It focuses on the occupations and activities performed by males and females in both subjects. The research highlights both negative and positive aspects. It encourages policymakers to review the content of the textbooks. The findings of the research demonstrate and assert that, even after the educational reforms, the content of the textbooks continue to show mixed portrayals of gender representation. For instance, Arabic textbooks presents the traditional and stereotypical understanding of gender. *Qiyam wa Ihtiram Al-Akhar*, on the other hand, presents gender-sensitive and transformational content. However, as the paper recommends, through minor modifications -and based on the recommendations of UNESCO-, both textbooks can successfully fulfill the goals of NSEEW2030.

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Appendix

Chart 1: Spectrum of Gender Representation in Textbooks

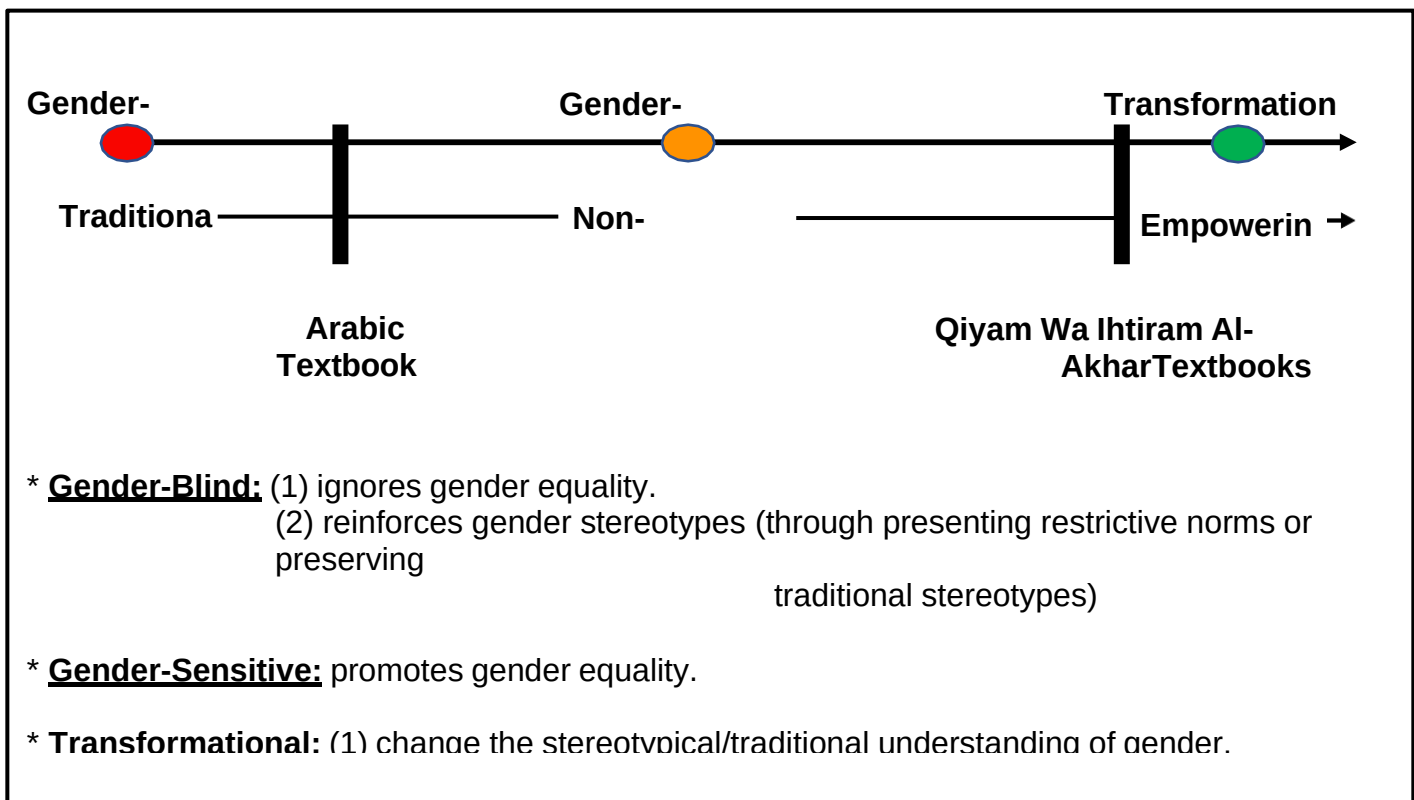


Table 1: Reflecting NSEEW 2030 Goals on the Textbooks

NSEEW 2030 Goals	Arabic Textbooks	Qiyam wa Ihtiram Al-Akhar Textbooks
Eliminating gender stereotypes.	☆☆☆☆☆	★★★★☆
Changing the mental image of women in the society.	☆☆☆☆☆	★★★★☆
Encouraging women to make positive contributions to the society.	★★☆☆☆	☆☆☆☆☆
Notes	* Occupations: traditional. * Activities: traditional.	* Occupations: not specified. * Activities: traditional and non-traditional.

Table 2: Gender Representation in Arabic and Qiyam wa Ihtiram Al-Akhar:
Occupation

Variable	Textbook			
	Arabic		Qiyam wa Ihtiram Al-Akhar	
	Males	Females	Males	Females
Traditional Occupations	★★★★★	★★★★★	_____	_____
Non-traditional Occupations	☆☆☆☆☆	☆☆☆☆☆	_____	_____
Equality in Occupations	☆☆☆☆☆		_____	

Table 3: Gender Representation in Arabic and Qiyam wa Ihtiram Al-Akhar: Activities

Variable	Textbook			
	Arabic		Qiyam wa Ihtiram Al-Akhar	
	Males	Females	Males	Females
Traditional Activities	★★★★★	★★★★★	★☆☆☆☆	★☆☆☆☆
Non-traditional Activities	★☆☆☆☆	☆☆☆☆☆	★★★★★	★★★★★
Equality in Activities	☆☆☆☆☆		★★★★☆	

Securitizing Migration in the Sense of Identity: The Hungarian Double Standards in Responding to the Refugees' Crisis

Donia Zaatar - Education Project Manager at Egyptian Red Crescent

Abstract:

Research Question: To what extent Hungary securitization/de-securitization of migration showed a double standard attitude towards migrants and refugees? Assessing the Hungarian response towards Syrian refugees' crisis and Ukrainian refugees' crisis

Main Concepts: Collective violence, populism and political extreme actions. **Theoretical Reference:** Securitization/ Populism

Purpose and Research Problem: The purpose of this essay is to critically discuss how the Hungarian government feared the loss of national identity rejecting the application of the European Union policies in accepting refugee which resulted in collective violent actions towards Syrian refugees and accepting Ukrainian refugees. Hence, showing the double standard concerning the same issue.

The issue of migration faced many oppositions in recent politics due to the large influx of migrants and refugees to western countries. European countries used to accept a reasonable number of migrants and refugees. However, this acceptance started to shift recently. Some European countries in the last decade show inadequate response to the migrants and refugees' crisis fearing that accepting migrants and refugees would threaten their own identity. Jonas(2019) Stated that some European countries broke the EU laws of hosting refugees because of fearing identity loss. Poland and Hungary as clear examples refused to take in any refugee and migrant, stating security and identity concerns. Hungary discriminated against Syrian refugees fearing identity loss. Orla (2019) stated that Hungary did not allow refugees entry after the Syrian crisis as it allowed in only two Asylum-seekers

per day. It has one of the strictest anti-immigration laws in Europe and has built a 109-mile- long fence along its southern border to curb crossings of refugees and Asylum seekers from Serbia and Croatia. In that sense, the purpose of this essay is to critically discuss how the Hungarian government securitized migration fearing the loss of national identity rejecting the application of the European Union policies in accepting refugee which resulted in populist mobilization and collective violent actions towards Syrian refugees and accepting Ukrainian refugees. Hence, showing the double standard concerning the same issue. This essay aims to answer its main research question that states "To what extent Hungary showed a double standard attitude towards refugees fearing identity threat? Assessing the Hungarian response towards Syrian refugees' crisis and Ukrainian refugees' crisis".

This essay mainly argues that fearing the threat and loss of national identity could lead to securitizing migration resulting in violent and discriminative actions towards minority groups through a populist attitude. In that sense, for the sake of protecting the national and social identity; Hungary did not respond effectively and responded inadequately to the Humanitarian Syrian refugees' crisis.

This paper will be divided into four sections: Introduction; Literature on the topic; Theoretical Framework social identity theory could be valid in the understanding of violent actions; Analysis of the Syrian refugee crisis response and the Ukrainian refugee crisis response; finally, Violent Actions Towards Muslim Refugees. For example, Viktor Orban stated, that he "simply reflected the will of the Hungarian people", refusing to accept refugees, because the large-scale immigration from Muslim countries undermines "the sovereignty and cultural identity of Hungary" and the Hungarian Prime Minister Viktor Orban defended his country's refusal of an EU-wide refugee resettlement quota, saying that he believed refugees are "Muslim invaders.

(Violent actions because of religious identity).

Introduction

“Given the substantial increase in the number of migrants worldwide, the issue of migration has taken center stage in the politics of Western countries.” As, many countries perceive themselves that they are threatened with the huge influx of migrants and refugees due to the instability and crisis they face in their countries of origin. According to UNHCR May 2022 report, in the past decade, the migrant and refugee crisis have more than doubled. In 2022 for instance, the UNHCR announced that they had surpassed the 100 million mark for total displacement, meaning that over 1.2% of the global population have been forced to leave their homes.

Moreover, Swain (2019), stated that migration is a double-faced term, in which it includes both voluntary as well as forced movements of a population from their home countries. A number of demographic, economic, sociocultural and psychological issues affect the nature and direction of voluntary human migration, while forced migration is the result of civil war, political and ethnic persecution, famine and environmental disasters. Migration is not a new phenomenon; it goes back to the earliest periods of human history. People have moved across communities and countries for centuries. Migration could be considered as a double faced issue, as it brings both opportunities and creates challenges to not only to migrants but also to the home and host communities (Swain, 2019).

Since, migrants leave their homes due to internal crisis in their countries like civil wars that results into human rights violations; also huge influx of migrants and refugees can cause negative consequences on the host communities. According to Isabel and Carlos (2017), migration could have both positive and negative consequences on the host country. In which these consequences can affect the host community in political, economic, sociocultural and environmental manner.

Isabel and Carlos (2017) stated that examples of the negative consequences that migrants and refugees could cause on the host community are the environmental damage, competition for resources, and labor market displacement.

Focusing on the sociocultural consequences of migration, social identity is one of the sociocultural factors that can be affected by the huge influx of migrants and refugees on the host community. The huge influx of migrants and refugees can threaten the culture of host country; as migration can increase the cultural diversity of a host country, until the host country loses its original cultural identity. Moreover, huge influx of migrants and refugee can cause cultural clash in which, migrants who have entirely different cultural values and norms to those of a host nation. When there are differences between the host and the origin country, tensions may build up between them which leads to cultural conflicts. Hence, in the recent decades' parallel to the raise in migrants and refugees number worldwide, many countries who feel that their culture is affected negatively by accepting migrants and refugees; they resort to securitizing migration to protect their national identity from being vanished.

Problem statement:

In light of focusing on migration and how it is securitized or de-securitized in recent decades, this essay aims to focus on Hungary as a European country that had a huge influx of migrants and refugees during both; the Syrian crisis in 2015 and the Ukrainian crisis in 2022 and how Hungary responded to both crises. Hence, the purpose of this essay is to critically discuss how the Hungarian government feared the loss of national identity through securitizing immigration rejecting the application of the European Union policies in accepting refugee which resulted on one hand in collective violent actions towards Syrian refugees, while on the other hand accepting Ukrainian refugees. Hence, showing the double standard attitude concerning the same issue.

This essay is focusing on the case of Hungary because Hungary as a European country showed a double standard in accepting and rejecting migrants and refugees. However, the issue itself was the same, but Hungary securitized and de-securitized migration for its own interest claiming that they are protecting their national identity. Thus, this essay is aiming to answer the following question: **“Why Hungary’s securitization/de-securitization of migration showed a double standard attitude towards migrants and refugees? Assessing the Hungarian response towards Syrian refugees’ crisis and Ukrainian refugees’ crisis.** By answering the previous research question, this essay argues that the Hungarian government tended to securitize migration in the case of Syrian migrants, but not in the case of Ukraine claiming that they were protecting their national identity. Hence, **Hungary did not respond effectively and responded inadequately to the Humanitarian Syrian refugees’ crisis justifying rejecting Syrian refugees while accepting Ukrainian refugees as protecting their national identity and homeland.** As, Hungary was fearing the loss of national identity when accepting Syrian refugees in which this resulted in violent and discriminative actions towards minority groups. While accepting Ukrainian refugees because they are European and they would not affect the Hungarian European identity. Hence, Hungary showed a double standard by securitizing and de-securitizing migration according to its interest responding inadequately to the Syrian refugees’ humanitarian crisis.

This essay will be divided into four sections in which the first section will be highlighting the main elements and components of securitization theory for the application on the case of Hungary, in addition to highlight the theory with the main concept which is social identity and the nexus between them. The second section will be reviewing some examples from literature and how it viewed securitizing immigration. The third section will be highlighting the methodology this essay will be using which is ‘Discourse analysis’ and how it useful on this case. The fourth section will be a discussion and analysis applying the case of Hungary on the previous.

Theoretical Framework:**“Securitization”: an overview:**

This essay has chosen securitization theory to be its main explanatory theory. As, in recent decades, the appearance of migration is related to securitization in different manners. According to Holger (2014) Securitization theory was developed by the Copenhagen School of Barry Buzan in the 1990s. Securitization theory proves that national security policy is not a natural given, but carefully designated by political leaders and decision-makers (Eroukhmanouf, 2020). In addition, securitization theory shows how different issue are being socially constructed by perceiving it in a certain way or not perceiving it in a certain way.

According to Catherine (2011), securitization theory is a the intersubjective and socially constructed process in which a threat to a certain referent object is acknowledged worth protecting in an immediate manner. Hence, anything could be securitized to be a top priority on the political agenda. For instance, environment could be securitized, climate change, economy, immigration, etc.. When a certain issue is being securitized by political leaders, thus it needs an immediate action because it has been considered as a threat. Eroukhmanouf (2020) stated, that when considering immigration as a ‘threat to national security’, this shifts immigration from a low priority political concern to a high priority issue that needs an immediate action, such as securing the borders.

This essay has chosen to link between migration and the securitization theory using the case of Hungary. As, in the recent decades since the number of civil wars, internal conflicts, environmental disasters and economic inflations increased; as a result, the number of migrants and refugees increased. Hence, securitizing immigration started to increase as well. According to Ariane (2015), securitization is the process through which some political elites in the west (such as governments, leading political parties, and associated policy networks) and the media construct immigration as a security threat which affects the public opinion

too. Typical aspects of securitization measures require and include the introduction of restrictive attitude such as border controls to fight terrorism, accompanied by those intended to curb illegal migration flows and to police minorities (Appollonia, 2015). Hence, the security-immigration nexus is visible in the ways in which governments and political leaders view policies on the integration of migrants and refugees in host communities as a way of increasing the internal threat.

Components of Securitization:

Before applying the securitization theory on the case of Hungary proving that immigration has been securitized in an extreme manner; it is important to clarify the securitization process. When speaking on securitization, it important to define and clarify the securitization theory's components. According to Stephen (et al, 2021) in order to speak about securitization there must be a threat, a referent object and the other. Firstly, a referent object, is a central idea in the securitization theory, in which it is the thing that is threatened and needs to be protected. The referent object could be the host country or its citizen; in which the host country perceives itself threatened by a certain security threat like migration for instance. Moreover, in order for a referent object to exist and proves that this referent object is threatened; there must be other components such as securitizing actor, who performs speech acts; and the audience, which has to be convinced of the need to adopt emergency measures in order to guarantee the survival (Santos, 2018). Secondly, the word threat in itself proves how things are socially constructed. According to the securitization theory, a threat is named as an existential threat in which, it contains severe and acute threat that threatens the foundations of the existing order and therefore it requires and justifies the taking of an extraordinary and immediate measures (Wertman and Kaunert, 2022). Thirdly, it is important to mention and define the word 'other' when speaking about securitization. In securitization theory, the word "other" always refer to the threat in which the "other" are the people who caused this threat to the host country. Looking to 'other' as inferior and the reason for instability that may appear. According to Williams (2010)

in the case of immigration, immigrants are 'the others' who pose a challenge to the national security of the host country through their different language, culture, norms, and religion.

The previous explanation shows that to securitize an issue, there must be main components to this. However, these components change according to the issue that is being securitized. Adding to the previous components the device of securitization which is 'speech act'. As, speech act is one of the most successful devices that helps in a successful securitization. Herta (2017) stated that 'speech act' is used by political leaders in framing 'the other as security threat. In the case of migrants and refugees, speech act is portraying migrants and refugees as threat to the host communities' security and how migrants and refugee crisis is named, presented as existential threat, to shift it from low political concern to high political issue. Migrants and refugees' crisis are employed by certain speech acts as a security threat to justify claiming the need to use whatever measures that are necessary to block the presented imminent threat (Herta, 2017). Mentioning the components of securitization theory would help in understanding it on different cases and examples; when securitization exists for instance on climate change and not only on immigration. Also, understanding the process and phases of securitization is beneficial in understanding the theory better.

The Process of Securitization:

Securitization is a process that passes by different phases in order to agree that a certain issue has been securitized. The process of securitization theory is very important to be understood to know how a normal issue has been shifted to a security threat and how audience are being convinced by this. According to Does (2013) security is the move and the change that takes politics beyond the established rules of the game and frames the issue either as a different kind of politics or as above politics. Hence, the process of securitization is considered as an extreme version of politicization.

In addition, speech act is the main actor in the securitization process. In light of this, Emmers (2011: 140) stated that securitization process consists of a security act ie: speech act by speaking the language of security highlighting a certain threat that requires asking for the adoption of extraordinary counter-measure and a political act, a political decision to articulate the threat a way as to convince the target audience that an immediate action is needed. Furthermore, securitization theory starts by: Firstly, establishing a security character of public problems. Secondly, the social commitments resulting from the collective acceptance that a phenomenon is considered as a threat that needs an extraordinary measures (Williams, 2010). Thirdly, the possibility of a particular policy for instance securitizing the borders in case of immigration is created to combat this existential threat (Williams, 2010).

Hence, the previous explanation of the securitization process according to different scholars substantiates that it consists of three phases. The construction of a convincing 'existential threat' narrative which is referring to immigration as a security threat. The mobilization of specific extraordinary measures to combat this existential threat. (Restrictive immigration policies). The mass acceptance of both the existential threat narrative and the extraordinary measures. This essay will be applying securitization theory on the case of Hungary substantiating that securitization could be used to satisfy a country's own interest claiming that there is a real security threat.

Conceptual Framework: The nexus between “Securitization and “Social Identity”:

In light of using the securitization theory as a theoretical framework for this essay, this essay aims to define the social identity as a main concept to better understand the case of Hungary in securitizing immigration. As, social identity is a concept that substantiate the securitization theory and how the referent object perceive other groups as inferior through justifying that they do not belong to the same social identity. Naoumi (2022) stated that social identity specifies the circumstances under which people perceive themselves as an individual or a group

and they act according to their agreed identity. Moreover, social identity could include different aspects religion, culture, language, ethnicity and politics. It also could be based on more than one aspect.

Moreover, Center of Creative Leadership (2022) stated that social identity influences people's values, the stories they tell about themselves and others, and things that motivate them toward certain actions. Hence, it is hard for some groups to accept people that do not belong to their national identity. According to Makalesi (2021) there is a strong correlation between social identity and securitizing immigration. As, during crisis some political leaders perceive migrants and refugees particularly who are culturally different, as a societal security threat to their national identity. In addition, both the concept of social identity and securitization theory apply the idea of "self and other" and "us and them." Jacob (2006) stated that cultural differences between 'natives' and 'foreigners' in Europe tend to produce violence. This is because of the representation of migrants and refugees as a security threat in Europe. This essay links securitization with social identity in the sense that securitizing immigration in Europe happens out of the fear of losing the social European identity through looking at others as inferior. Immigration and asylum as securitized by recourse to xenophobic and stereotype-based political discourses and social practices of actors both at state and European Union level. Jacob (2006) argues that Europe securitize immigration because of social identity, which is (re)constructed in an exclusionary way characterized by dichotomies between self and other.

The previous examples substantiate the strong correlation between social identity and securitization. As, this essay is applying the theory of securitization and the concept of social identity on the case of Hungary to prove how Hungary's double standard during Syrian and Ukrainian refugee crisis was justified as protecting their culture and social identity.

Literature Review:

Securitizing immigration is not a recent phenomenon as it goes back to what happened in the United States after 9/11. However, it started to rise and increase in recent decades due to the civil wars, climate change, environmental disasters, famines, inflation and etc. Focusing on Europe, as this essay is examining the case of Hungary. Due to the huge influx of migrants and refugees that the European countries faced in the past decades, evolving internal context in Europe has perceived migration as a security threat, which has resulted in more restrictive measures and policies to limit the migration flows.

Literature is divided into two schools of thought; on one hand some agree that securitizing immigration is efficient as it protect the internal stability of the host country. On the other hand, the other camp of scholars believes that securitizing immigration and closing the borders in front of vulnerable migrants and refugees is an inadequate response to this humanitarian crisis.

Firs School: 'Securitizing Immigration is Necessary':

On one hand, literature included some scholars who are defending securitizing immigration to protect the national identity and the stability of the host country; in which this was the case in the United Stated after 9/11 and European countries in 2015 after the huge influx of Syrians. According to Enela (2016), The phenomenon of immigration is highly regarded as securitized. The question here is related to the legitimacy of the securitization process and to what extent it affects and impacts human rights and fundamental freedoms considering it as a humanitarian crisis. However, it is widely recognized that there is a contradiction between the human rights and that of security. Hence, securitizing immigration is necessary however, it may contradict the human rights' framework.

Since the 1980, migration in Europe was constructed and perceived as a phenomenon of destabilizing the internal system of the host country. Huysmans (2000), clarified that migration is related to a wider politicization process, in which

migrants, refugees and asylum-seekers are portrayed as a challenge to the protection of national identity and welfare of the host state. Furthermore, Wyngaarden (2013) stated that Migration is socially constructed and one of the most contested security issues in the European Union. Migration is being represented as a security threat to European identity (norms and society), which resulted in motivating policies and practices which supported in securitizing migration. As an example of one policy that the European Union used to securitize migration is the citizenship policy. The citizenship policy has been a primary tool used to frame migrants as a threat by reforming citizenship acquisition and hence membership and accommodation in Europe to be more difficult and dissuade migration by third country nationals in general (Wyngaarden, 2013).

In addition, Bockel (2021) stated that securitizing migration was necessary for the European union to combat flows of migration that may cause terrorism in Europe. As, securitizing the European border and closing it in front of migrants and refugees was necessary to protect the European national security from refugees as existential threats to European identity and culture. Moreover, some scholars believed that securitizing immigration in Europe is essential, as according to Wing (2006) migration is considered as a security threat in light of the of 'increasing the societal threat' which includes national, cultural and social European identity. In addition, Blake (2018) stated that Wellman's argued that there are three simple premises which justify securitizing immigration: firstly, is that legitimate states are entitled to self-determination; secondly, self-determination includes freedom of association; and, thirdly, freedom of association includes the right of self-protection. These three premises are developed into an argument that substantiates the right to close the borders against even the neediest migrants and refugees as if a state has adequately pursued its obligations under international justice, it can simply by owning its self-determination can refuse to allow any migrants or refugee to cross into its territory (Blake, 2018). Hence, the European

countries have to secure their border even if this would lead to increasing the levels of violence against 'foreigners', and the rising popularity of anti-immigrant parties.

The previous examples of different scholars show that a part of literature agreed with securitizing immigration in the European countries to protect the domestic stability. As, the anti-immigration policies appeared in Europe since 1980s, however, it turned to extreme due to the recent waves of migrants and refugee fleeing to Europe seeking asylum; this was increased by huge rates after the Syrian refugee crisis of 2015. According to Pew Research Center Report, Conner (2016) Europe was shifted to a transit and host country in 2015 as a record of 1.3 million migrants and refugees applied for seeking asylum in 28 member states of the European Union, like Norway, Hungary, Poland, Germany and Switzerland in 2015 during the Syrian crisis. The previous evidence from literature substantiates that some scholars supported securitizing immigration in the European countries to protect the national identity and domestic affairs of the EU. Hence, this school of thought believes that legitimate states have the right to secure their border against any potential migrant or refugee and this could have considered ethical even during humanitarian crisis.

Second School: 'Securitizing Immigration is Unethical':

On the other hand, another school of scholars showed a stance against securitizing immigration by mentioning that securitizing immigration is against humanitarian crisis. According to Oxfam (2020) ,for too long the EU's migration policies have ignored the priorities of the countries it partners with for the sake of its own border security and domestic priorities. These have permeated the domestic migration and asylum policies of the Maghreb countries it supports, including Tunisia and Morocco, in a convergence of national interests of states, at the cost of people's interests. The EU's cooperation with its neighbors has to encourage a real common interest: but first prioritizing saving humanity by protecting people and fulfilling their rights by opening the border for them (Oxfam, 2020).

Furthermore, many European countries justified closing borders in front of migrants and refugees as a sort of protecting their countries' stability from terrorist and illegal migrants. However, in reality European countries were acting against humanity and against the Syrian crisis and innocent people who were seeking asylum. According to Cerneka (2020) closing the border in front of vulnerable refugees who are in need is unethical, inhumane, illegal and immoral action. As, this causes negative consequences on migrants and refugees and their families in which this can lead to death. In addition, Hidalgo (2019) argues that borders and restrictive immigration policies are settled during humanitarian crisis are unjust borders and have to be breached. As, he argues that individuals do not have to morally comply with unjust immigration laws and policies, however these individuals are morally obligated to resist them to protect their lives against wars, sexual harassment, climate crisis and inhumane lives they face daily in their countries. Moreover, some scholars state that opening borders receiving migrants and refugees could be beneficial to the host country, however, some countries securitize immigration for their own interest justifying this unethical action as protecting their borders and they avoid stating how this would have a positive impact on their countries. Slavio (2020) stated that in the current world crisis, opening borders is effective in reducing the global inequalities and helps in saving humanity. The previous examples substantiate how a group of scholars are trying to prove that securitizing border is unethical in which countries have to accept migrants and refugees who are suffering from inhumane actions in their home countries.

Some European countries opened their borders for migrants and refugees during 2015 Syrian crisis like Germany, Sweden and France. According to CNN report Germany was advocating that all Europe has to accept the Syrian migrants and refugees and open the European borders for them (Martinez, 2015). As, Chancellor Merkel mentioned that European countries have to set and take a share of displaced people, including people from Syria and open the borders to save

them. However, other European countries closed their borders strictly against migrants and refugees stating that they are terrorists and they cannot accept them in their countries in which they are considered as a security threat to Europe. According to the relief web report that was issued in (2016), during the Syrian refugee crisis on March 8, 2016 the Balkan route became closed to migrants and refugees and following an official border closures in Macedonia, Croatia, and Slovenia. This led to an inhumane situation to these migrants and refugees left of the borders. As by the end of April 2016, these closures effectively left approximately 54,000 refugees and mixed migrants, including thousands of Syrians, stranded in Greece.

Furthermore, other European countries showed an extreme way of securitizing immigration during the Syrian refugee crisis that was considered by the international community as unethical. Baczynska and Landauro (2023) stated that Polish Prime Minister Morawiecki accused Germany for accepting Syrian refugee inside the European countries. As, the Polish leader tried hardly to collaborate aiming to convince the EU countries to refuse to host people arriving from the Middle East and Africa. As the Polish Prime Minister stated that, "Poland does not agree to have someone else furnishing our home," said Morawiecki. As, for Hungary, it took same stance as Poland as they acted allies concerning rejecting migrants and refugees in Europe imposing restrictive immigration policies. According to Beauchamp (2015) the Hungarian prime minister announced during the Syrian refugee crisis that his goal is to discourage refugees from crossing into Hungary, even at the cost of treating them inhumanely.

The previous literature shows how there are different two stances concerning the issue of securitizing immigration. On one hand, a school of thought that justifying securitizing immigration in an extreme and inhumane manner to protect the national security of host country. On the other hand, a school of thought rejecting securitizing immigration perceiving it against humanity and unethical, as

the international community has to have a role in saving humanity and protecting these vulnerable migrants and refugees.

In light of the previous, this essay is applying the securitization theory taking a stance with the second school of thought, that some European countries securitized immigration in an unethical and extreme manner for its own interest. However, in another period of time same countries accepted a huge number of refugees claiming that they would not affect their domestic stability. As, this essay will be assessing the Hungarian double standard of rejecting Syrian refugees while accepting Ukrainian refugee and how this proved unethical and inadequate response to this humanitarian crisis.

Methodology: “Discourse Analysis”:

This essay will be using discourse analysis as a method that would help in substantiating the Hungarian double standard concerning securitizing immigration and refugee crisis. Mogashoa, (2014) stated that discourse analysis is a useful method in academic research. As, discourse analysis aims to reveal the motivation and politics involved in arguing for or against a specific research method, statement, topic, issue or value. As, it draws on the necessity for describing, interpreting, analyzing, and critiquing the language reflected in text (Mogashoa, 2014). Moreover, Riley (et al, 2021) stated that Foucault defined discourse analysis as a method of examining the ideas people use to make sense of themselves and to prove themselves correct; how these ideas come to be “acceptable” at that moment; and the consequences of audience accepting these ideas. Hence, for Foucault discourse analysis is the understandings people use language to make sense of themselves and can be noticed through their language.

In light of this, this essay is assessing why Hungary securitized and de-securitized immigration showing a double standard reaction through assessing the language of the Hungarian prime minister and population used when speaking about migrants and refugees. Hence, the essay is using discourse analysis to

prove how language of Hungarian showed a double standard attitude towards migrants and refugees during the Syrian refugee crisis and the Ukrainian refugee crisis.

Discussion and Analysis: “The Case of Hungary”:

In light of applying securitizing immigration in the sense of protecting the social identity in Hungary, Hungary used to discriminate between Syrian and Ukrainian refugees, however it was the same humanitarian crisis. Hungary during the Syrian refugee crisis especially in 2015 did not act in a humanitarian manner. In that sense, Hungary is one of the European countries that clearly acted against the EU policies in accepting and helping Syrian refugees. However, Hungary showed a solid discrimination against them. One of the reasons Hungary justified this discrimination; is that migrants and refugees threaten Hungary’s social and national identity; not only Hungary but all Europe.

Moreover, Robert (2015) stated that Hungary’s prime minister, Viktor Orban, was criticized directly because of his claims against migrants and refugees that it was important to secure his nation’s borders from mainly Muslim migrants “to keep Europe Christian.” Moreover, Viktor Orban defended his country’s refusal of an EU-wide refugee resettlement quota, saying that he believed refugees are “Muslim invaders”. Hungary’s prime minister words substantiate that he was using identity as a tool to justify his discriminative reactions and policies against Muslim migrants and refugees and securitizing immigration justifying that it is a security threat on the European identity. Hence, Orban justified securing the border in front of vulnerable migrants and refugees claiming that these people “the other” or “them” are coming from different religions and represent different culture.

Furthermore, Hungary used hate speech against Muslim migrants and refugees; as well as reacting in a violent manner against them. Hungary securitized immigration by building a fence to secure its borders against migrants and refugees to implement a promise by its Prime Minister Orbán to defend the

country's borders against what he called a Muslim invasion that threatened Europe's Christian identity (Cbc radio, 2020). In that sense, Hungary also justified its violent actions towards a humanitarian crisis that it's their right to defend its own identity without taking into consideration the sufferings of these vulnerable people. Moreover, the Hungarian government tried to mobilize their fear of losing their identity because of migrants and refugees to their citizens. Irina (2018) argued that Orban claimed, "simply reflected the will of the Hungarian people", refusing to accept refugees, because immigration from Muslim countries undermines "the sovereignty and cultural identity of Hungary".

The previous evidence and speeches of Hungary's Prime Minister substantiate the importance of identity in relation to securitization. As, it was clear how Orban used hate speech, violent actions and restrictive policies against vulnerable migrants and refugees only justifying that he has the right to protect his nation's religious and cultural identity. The idea of social identity could be accurately understood from the case of Hungary's action towards Muslim refugees because it shows the sense of belonging to a certain group and the idea of 'us and them' which is embedded in both securitization and social identity. It was obvious when Orban mentioned that he was protecting 'their' own religion Christianity against the 'others' religion which is Islam. What Orban did and his justifications to this action did not in reality justify his response towards a humanitarian crisis; he only used the sense of identity and protecting it from migrants and refugees. Hence, speaking in the sense of identity and how it is important to groups could lead to massive actions against humanity that could change the whole world and affect the national and international community. Hence, Hungary responded inadequately to the Syrian Refugees crisis.

'The Hungarian double standard': Accepting Ukrainian refugees in Hungary:

On the other hand, Hungary welcomed and accepted huge numbers of Ukrainian refugees. Monika and Kristof (2022) stated that Hungary as one of the toughest EU countries towards refugees; opened its borders removing all restrictive securitization policies in front of thousands of Ukrainian refugees. Hungary opened its borders for Ukrainian refugees to benefit and protect them as they are as Hungarians white and Christians. Hence, they have the same identity and values, and they are not considered a threat to the Hungarian identity (Palotai, Veres, 2022). Hence, they claimed that Ukrainians deserve a welcoming country ensuring their protection. Furthermore, Stewart (2022) another situation demonstrates how Hungary discriminated between refugees and vulnerable people during a humanitarian crisis; Hungary has recruited dozens of volunteers and aid workers to help the hundreds of Ukrainian refugees passing through every day.

In light of this, Hungary did not hide its discrimination towards refugees. However, it showed obviously that it won't allow Muslim refugees because of its religious identity; but it will support and allow Ukrainian refugees to have home in Hungary because their religious identity matches Hungarians religious identity. Thus, Hungary did not have a restrictive migrant and refugee policy in general; but it substantiated its xenophobia and discrimination manners responding to humanitarian crisis. Lauren (2022) argued that A week after Russia's invasion, the Hungarian Prime Minister traveled to the border town to meet Ukrainian refugees himself to welcome and host them in Hungary. As Orban claimed in his speech to reporters at a refugee aid center that "Hungary is a good friend of Ukraine and the Ukrainian people. If they need any help, we are here and they can count on us," (Egan, 2022).

Furthermore, Orbán did not only change his restricted migration policies for Ukrainian refugees; but he also ensured that if Ukrainian refugees will stay for a long period of time in Hungary; he will support them with jobs, food and good living conditions. According to Hungary Today (2022) Orbán said that all preparations have started to provide work for Ukrainian refugees. “We will try to offer an opportunity for everyone to create their own livelihood,” In light of this, the Hungarian prime minister believes that Ukrainians because of their common religious and cultural identity as Hungarians, deserve to have a safe place in Hungary and have the right to work there. Unlike what happened to Syrian refugees where fences were built in front of them to prevent their entry and their right to even seek asylum justifying that Hungary’s identity will get affected negatively from these Muslim refugees.

The previous evidence is some of the examples for the discourse of the Hungarian prime minister to substantiate Hungary’s double standards towards migrants and refugees under the name of protecting their social identity through imposing restrictive immigration policies and securitizing immigration against Syrian refugees. However, Hungary changed its restrictive and anti-immigration policies to accept Ukrainian refugees which shows their clear stance of xenophobia and discrimination toward the Syrian refugee crisis in 2015 acting inadequately to this humanitarian crisis. If Hungary needed to securitize immigration policies for the sake of protecting Hungary in general; it would not have softened it during the Ukrainian refugee crisis.

In that sense, Hungary did not hide their stance against Muslim migrants and refugees that will threaten their identity because of their different religion and culture. Hungary was also very clear when it claimed that they have to help and save Ukrainian refugees because they are white and Christian as Hungarians and as whole Europe. Hence, Hungary used the claim of identity in securitizing

immigration during the Syrian refugee crisis through violent, inhumane and discriminative manners.

Conclusion:

In conclusion, the previous case of the Hungarian double standard in dealing with refugees shows the strong and clear correlation between securitization and social identity, as both deal with an issue in the sense of “us and them”. As, when a group of people feels that their identity is threatened by another group entering their country to seek asylum, they start in securitizing immigration justifying that this may cause negative effects on their national identity. Hence, the strict belonging to a certain identity could turn normal actions into violent and hate actions. What happened in Hungary during two different periods concerning the same issue that was dealing with migrants and refugees substantiates the essay main argument Hungary did not respond effectively and responded inadequately to the Humanitarian Syrian refugees’ crisis justifying rejecting Syrian refugees while accepting Ukrainian refugees as protecting their national identity.

On one hand, Hungary’s response to 2015 Syrian refugees’ humanitarian crisis shows how Hungary resorted to using hate crimes and hate speeches against Syrian refugees as the discourse of the Hungarian prime minister showcased the hatred towards Syrian refugees just because their identity is different than that of the European identity. Hungary justified not protecting Syrian refugees building fences in front of them to prevent their entry by mentioning that their religious and cultural identity will affect the whole European identity in a negative manner. Hence, Hungary did not follow the European Union’s policies in accepting Syrian refugees but accused the European countries that were accepting refugees claiming that they are saving their own identity specifically Christianity as their main religious identity.

On the other hand, during the Ukrainian war; Hungary softened its immigration policies to welcome a huge number of Ukrainian refugees. The Hungarian government mentioned that Hungary and Ukraine are friends as they have the same religious and cultural identity. Hungary changed its stance with Ukrainian refugees in a way that substantiated its discriminative policies during 2015 Syrian refugees 'crisis however, the Syrian refugee crisis was a humanitarian crisis that international community has to respond to. But in reality, Hungary was clear in its stance justifying its response to both crises as protecting the Hungarian and the European identity. Hence, Hungary substantiated its fear of losing identity through its double standard policies of securitizing and de-securitizing immigration.

Also, the Hungarian case applied a successful process of securitizing immigration through its three stages of firstly, the construction of a convincing 'existential threat' narrative which is referring to immigration as a security threat clarifying that accepting Syrian refugees could lead to negative consequences on the European identity. Secondly, the mobilization of specific extraordinary measures to combat this existential threat, which is imposing restrictive immigration policies and closing the Hungarian borders in front of the Syrian refugees. Thirdly, the mass acceptance of both the existential threat narrative and the extraordinary measures this was proved through the discourse and language of hate speech from Hungarians towards Syrian migrants and refugees.

Finally, the Hungarian double standard towards the refugee crisis showcased that even, in the humanitarian crisis; countries that have obligation to protect and safeguard vulnerable people can act inadequately because of identity. Hence, the Hungarian double standard concerning the same humanitarian crisis shows how a country could not respond just to protect their own identity.

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[at%20threatened%20Europe's%20Christian%20identity](https://www.cbc.ca/radio/ideas/how-the-hungarian-border-fence-remains-a-political-symbol-1.5476964#:~:text=Hungary%2C%20in%20particular%2C%20quickly%20built,th)

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Disease and Pollution in The Writings of Sayyid Qutb Through The Lens of Mary Douglas' Purity and Danger and Natural Symbols

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Abstract:

Following the logic of Emile Durkheim, Douglas expects the geo-political concerns of the wider community to be replicated in the bodily concerns of individuals. In societies where interactions with foreigners bring more evil than good, for instance, Douglas observes that individuals are usually encouraged to protect both the borders of their territories and the physical boundaries of their own bodies.

This paper argues that Douglas' two central insights - i) human beings classify their worlds through the concepts of purity and pollution; and ii) a deep psycho-social relationship exists between the communal and individual bodies - are of direct relevance to Qutb's description of the umma. For Qutb, the world is divided in stark terms between, on the one hand, the adherents, symbols and systems of the Islamic civilization and, on the other hand, the adherents, symbols and systems of all non-Muslim civilizations. With the boundary lines drawn, Qutb encourages (pure) Muslims to isolate themselves from the (impure) Western world.

As Douglas expects, Qutb attaches a special degree of danger to Muslims who cross boundaries by seeking to emulate Western behaviours or who live in the West. In so doing, they are neither truly Western nor Muslim. As noted, in speaking of the umma itself, Qutb appeals to the language of decay, sickness and disease. Such metaphors had been used by many others before him. By describing the umma as dead, however, Qutb takes this metaphor further. (Indeed, even Douglas does not anticipate this degree of horror.) The same strategy, however, allows Qutb to argue for radical

political action - revolution against the state - in terms of a purification (and thereafter a rebirth) of Islam itself. This paper presents the discourse of purity and pollution in Qutb's *Ma'alim fi al-tariq* and other relevant works (such as *Islam and the Problem of Civilization*) as a coherent rhetorical strategy. Guided by Mary Douglas' theories, it explores the ways in which Qutb seeks to impose order on his own religio-political landscape. Douglas' theories allow for a fresh engagement with Qutb's work and a deeper understanding of his hope for a new (pure) umma

Accepting Ukrainian Refugee: The Hungarian state will provide free accommodation, food, medical Assistance, and financial aid to refugees from Ukraine. "Hungary is a good friend of Ukraine and the Ukrainian people. If they need any help, we are here and they can count on us," Orbán said, speaking to reporters at a refugee aid center.

Proving the Hungarian Double Standard: It was an unusual trip for the conservative nationalist leader. Orbán has earned a reputation for xenophobia and harshness toward refugees due to a wide range of actions he took in response to the 2015 Syrian refugee crisis – including building a 13-foot razor-wire fence along Hungary's southern border with Serbia and deploying armed forces to kick out refugees he said were in the country illegally. And he frequently portrayed refugees as rapists and terrorists. Now, Orbán has opened up Hungary's borders to Ukrainian refugees and has backed down from his anti-immigrant rhetoric.

Introduction

The Muslim ummah is a concept that supersedes concepts of land, and ancestry by emphasising the role of the Islamic doctrine in their lives. In *M'aalim fi al-Tariq* ("Milestones"), Sayyid Qutb (d. 1966) argues that the ummah must be recovered from the debris that has been left behind by previous generations. According to Qutb, the umma has ceased to exist in any meaningful sense because the rule of Shari'a has been replaced by new

systems of thought. For the umma to be reborn, Qutb announces, radical action is now necessary.

In describing the umma as “ill,” “dying” and even “extinct,” Qutb repeatedly appeals to metaphors of the physical body. To explore Qutb’s use of body imagery in relation to the umma, this paper utilizes the theories of the social anthropologist Mary Douglas as outlined in *Purity and Danger* (1966) and *Natural Symbols* (1970). Though Douglas was an anthropologist, her theories have often been used by political scientists grappling with questions of identity and culture.

Douglas is primarily interested in the ways in which human beings seek to impose order on their social/political realities by dividing the world into categories of “pure” and “impure” or “polluted.” *Danger*, Douglas argues, is often perceived as lying in the margins between these categories; and those who confuse the classification processes - for instance, immigrants, travellers, or non-heterosexual members of a community - are most likely to be accused through purity language. For Douglas, while cultures differ, the motivation underpinning this classification process is universal. The same process is employed in multiple contexts to enforce internal social hierarchies as well as external boundaries.

Following the logic of Emile Durkheim, Douglas expects the geo-political concerns of the wider community to be replicated in the bodily concerns of individuals. In societies where interactions with foreigners bring more evil than good, for instance, Douglas observes that individuals are usually encouraged to protect both the borders of their territories and the physical boundaries of their own bodies.

This paper argues that Douglas’ two central insights -human beings classify their worlds through the concepts of purity and pollution; and ii) a deep psycho-social relationship exists between the communal and individual bodies - are of direct relevance to Qutb’s description of the umma. For Qutb, the world is divided in stark terms between, on the one hand, the adherents,

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As Douglas expects, Qutb attaches a special degree of danger to Muslims who cross boundaries by seeking to emulate Western behaviours or who live in the West. In so doing, they are neither truly Western nor Muslim. As noted, in speaking of the umma itself, Qutb appeals to the language of decay, sickness and disease. Such metaphors had been used by many others before him. By describing the umma as dead, however, Qutb takes this metaphor further. (Indeed, even Douglas does not anticipate this degree of horror.) The same strategy, however, allows Qutb to argue for radical political action - revolution against the state - in terms of a purification (and thereafter a rebirth) of Islam itself.

This paper presents the discourse of purity and pollution in Qutb's *M'aalim fi al-Tariq* and other relevant works (such as *Islam and the Problem of Civilization*) as a coherent rhetorical strategy. Guided by Mary Douglas' theories, it explores the ways in which Qutb seeks to impose order on his own religio-political landscape. Douglas' theories allow for a fresh engagement with Qutb's work and a deeper understanding of his hope for a new (pure) umma.

In order to study any religion or religious thought, one must first understand the unique circumstances within which it has manifested. It must be studied independently, this can be done by examining the surrounding factors such as politics, kinship, culture, and perception. This study cannot be done on each element independently, religion or religious thought must be studied in tandem with all these elements simultaneously. This reflects on the application of any religious thought, as it depends on the cultural and surrounding environment, resulting in religion and religious thought be governed accordingly, and why the same religious thought can be so

fundamentally different if studied across different regions and different timelines.

Welbourn (1970) adds that if religion's social context is ignored, this would lead to the presentation of an incomplete and misleading picture. This is supported by Douglas' writings on nature vs nurture. In the sense that society surrounding religious thought must be examined and studied, in order to present a fair image on the religious view. By studying the contexts surrounding religion, one can identify the inter-linking chains between religious thought and its impact, and culture and society.

This study would be considered to be more accurate than others, as it would result in the comparison of religion within its place in culture, studying the cultural and societal impacts on the spread of theology. Societal and cultural elements can include but are not restricted to: attitudes and traditions, political thought and ideology, leaders, and socio-economic status of individuals within the society.

Accordingly, this can help with identifying the concepts of purity and danger discussed by Douglas in her writings. Whereby purity coincides with what culture and society deem appropriate, and that which is pollutant or dangerous is that which goes against the standards of the culture or society within which a religion, or certain religious thoughts manifest and grow.

One of Douglas' main tenants in writing, is her comparison of society to the human body. Whereby society forms a human biologically correct body, that can either be considered as healthy, or diseased. Stating that the more exerted a body is, the more likely it is to become polluted and diseased. This impacts her writings on the social experience, suggesting it must be seen in "two dimensions", the group and the grid. The experiences of a bounded social unit, and the ego-centred relationship must each be studied and examined separately in order to result in an efficient overall image of society and that which influences it, and how it is influential in its own right.

Douglas in her writings, introduced religion as guided by one of two

elements: fear, and confusion. To her, fear pushed individuals and societies to follow behind ideologies and religious conceptualizations for the simple regard of safety and protection from the other. While on the other hand, she also mentioned confusion of society in regards of defilement and hygiene- which sets the introduction for her analogy of society as a human body fearing defilement and disease. Both these aspects will be discussed later on during the paper, while highlighting the strategies and ideologies of Qutb, supporting how he managed to ingrain his ideology into society by using god as the main fear factor to convince those who would listen to abide to the scripture of god, and that if they were not to do so, then the wrath of god shall consume them and they shall perish as Kufar - apostles. While with the aspect of pollution, and disease he emphasises the pollution festering through Muslim societies and the Islamic umma. This is highlighted by his ideas on secularism, and adherence to the communist regime and influences surrounding Egypt at the time.

With Douglas, her main goal as mentioned in her writings on purity and danger, was to create a united experience for understanding religion and religious thought by showing the linkages between purity and impurity and how they can help one formulate a comprehensive idea on the central projections of religion.

She states that pollution is present on two different levels, that which is instrumental and that which is expressive.

Instrumentally, people attempt to influence others' behaviour whereby the universe is guided by beliefs that. Reinforce social pressures. It utilises the instruments that can participate and facilitate the pollution of a society.

This reflects through a society's political lens; whereby political power is held within the hands of the "primitive" rulers. In this prospect, political rulers back their legitimacy through belief and the pretence of godly power emanating through them and that their legitimacy is guided by God.

This portrayal of godly eminence is utilised to coerce societies into following

their political leaders adhering to their fabricated moral codes and opinions, Douglas (p.3, 1966) on this states that “the whole universe is harnessed to men’s attempts to force one another into good citizenship”.

When she discusses expressive pollution, she highlights the outcomes of actions and behaviours emanated by societies. The re-action to a catalyst or an action taking place within the community itself. She examines the triggers that can result in events that can shape the identity of a culture, resulting in shifting of traditions and behaviour along with the trajectories of individuals.

She emphasises that society does not exist in a neutral vacuum, but that instead, is subject to external pressures that are not a part of its internal laws, therefore breaking through the margins and boundaries of an internalised society.

One of the main tenants of her writings and thought are based on the fact that for a semblance of order to be created, the differences between elements within society must be exaggerated, and differences identified between them.

Within Douglas’ (1966) writings, she emphasised that symbolic language could be interpreted in varying degrees of differentiation. That the relationship between purity and impurity is not always constant and can be interpreted in accordance with belief.

She also discussed the paradox of cleanliness and pollution vs holiness and un-holiness. Whereby that which is clean is not necessarily perceived as holy, and that which is pollution or unclean is not necessarily unholy. That different perceptions may exist depending on the ideas and mental capacity of the one who discusses them.

Pollution for Douglas was not just considered to be in tangible form, such as environmental pollution or so, no. pollution to Douglas was more linked to symbols, and concepts, whereby ideas of pollution relate to social life. That pollution can be used to express a general view of social order. In purity and danger, she tackled how some ideological pollution can also be perceived as bodily pollution.

In her writings on ritual uncleanness, Douglas (1966, pp.7-30) discusses both hygiene and respect for conventions, she depicts the differences between literal dirt and pollution, and the symbolic tenants of both. Highlighting how some may not show a sense of care or attentiveness to physical dirt and would rather focus on how figurative dirt-such as morals-may contribute to the feeling of lack of hygiene. To her, there is no link between dirt and sacredness, which sets the basis for her ideas that some societies or individuals may consider the lack of sacredness to be unclean in its own self. Sanctity in this sense becomes specialized, abandoning actual cleanliness in favour of that which exposes divinity to profanation, and that this is interlinked with linguistics and the paradoxes created by changing vocabulary.

Douglas also strikes a comparison between Smith and Darwin's parallel treatment of culture and organic species respectively. Stating that while one was more focused and concerned with the conditions under which organisms and species may appear, with an interest in the survival of the fittest and the expressive or external elements that contribute into the survival or continuation of a species or organism, external elements could also be participant in the eradication or evolution of species and organisms. The other was more concerned and interested in the lingering survival of the unfit in vanished cultural relics.

During one of her cultural studies, Douglas examines the society of Israel. Whereby she discusses how it was guided by a sense of religious inferiority towards its surrounding neighbours. She states that this is guided by two characteristics: abounding demonology, rousing fear in the hearts of followers, and the comforting stable relation with the community God. She states that this is seen in all versions of Abrahamic religions, which can be later seen in the dialogue by Qutb whereby he uses language of disease, and extinction to encourage the development of an umma dedicated for the service of the God.

Qutb, managed to fit quite nicely into Douglas' criteria of instrumentalism and her ideas on secular defilement. Whereby he conveyed the belief that the *umma* needed rebirth and cleansing. This though transcended as he legitimised his pretensions and backed it with the belief of an image of the *umma* conveyed by God. According to Douglas, beliefs such as this can be rather dangerous, and threatening as men use them to coerce others, resulting in lapses of righteousness for the latter.

Douglas stated that "certain moral values are upheld and certain social rules defined by beliefs in dangerous contagion, as when the glance or touch of an adulterer is held to bring illness to his neighbours or his children."

Pollution to Qutb was highlighted in his writings in milestones, where the pollution stemmed from the following: existing Muslim governments, whereby they were considered to be un-Islamic and not following or preaching the true doctrine of Islam. Secondly, he considered the communist regime set forth by Abdel Nasser to be an imitation of a western apostle regime created by non-Muslims and non-believers, and that any who apply it and accordingly follow it are not to be considered true Muslims and should be terminated. Thirdly, he perceived the spreading of secular culture within Arab and what were "supposedly" Muslim communities to be one of the main factors as to why the Muslim *umma* had reached a decline that resulted in its so-called extinction. In Qutb's writings, he encourages the rebirth of Islam to eradicate the credit compiled by the world with developments of science, culture, systems, and practical production.

Unlike other authors in Islamic thought, his ideas lean more towards the extinction of the *umma*. Instead of emphasizing illnesses and diseases that plague the *umma*, he argues that the *umma* has been long extinct as within modern times, there is no society that obeys and implements the will of God as it should be implemented and followed.

This is strikingly similar to the writings of Douglas (1966, pp.30-) where she discusses the notions set forth by secular defilement. To her this revolved

around that with time and gained experience, individuals make great investments into their system of labels, resulting in the manifestation of conservative bias that continues to exist even with societal developments and growth. That the more consistent experience is with the past, the more confident societies become with their assumptions, believing them to be standard, familiar, and correct.

This is highlighted by Qutb's rhetoric on the west and its ideologies, drawing a comparison between pre-Islamic times where societies were guided by false deities and beliefs, in addition to historic narratives regarding Islamic societies that were inevitably destroyed by western intervention. That in order for a society or an umma to remain clean, holy, and unmarred it must first rid itself of the foreign/secular influences comparing them to defilements that must be corrected.

He criticizes the fact that in modern times this Islamic umma has become extinct in a sense due to the external factors of the universe, and that there should be a development in Islamic discourse to encourage the rise of the umma once more. The Umma he highlights is one where there is a group of people whose life standards, imaginations, norms, and values are all derived from the Sharia 'a of God, and that as long as god's sharia 'a is not present then this umma will never come back to existence.

In his book milestones, Qutb is quite confrontational when it comes to socialist and communist approaches to the economic system, claiming them to be attempts by the west to spread their ideology through the middle east, and that as a result of their apparent failure Islam should interfere and take over through a development of an Islamic Umma as an extension of the hand of god-where he quotes several verses of the Quran to strengthen his claim on the concept of an Islamic Umma placed on earth to obey and apply the will of god.

He argued that in order to regain the appropriate Islamic momentum, Islamic life must be retained. In the sense that there must be an Islamic community

ruled by the spirit of Islam and Islamic law, wherein Islamic Shari'a and legislation are where laws are derived from. Additionally, he emphasizes how the Islamic life has come to a halt, which eventually has led to the eradication of the principles and values of Islam.

Qutb was disappointed by the fact that mankind-Muslims in particular- had surrendered to the western principles such as those of communism as well as secular culture and he encouraged the rebirth of Islam in order to eradicate the credit the world had compiled when its relevant to development of science, culture, political systems, as well as practical production.

With Douglas (1966, pp.9-13) she discusses the differentiations that stem from symbolic language, stating that relating purity and impurity is a dealing with symbolic language capable of degrees of differentiation, and can easily be confused with the confusion between the idea of holiness and uncleanness. There is a notion of confusion between sacred contagion and uncleanness in Brahmanical religions.

Qutb perceived socialism, western society, and secularism as unclean and a cause of pollution for the umma, depicting them as a disease. According to (Eisa & Kumar, 2014, p.4) communism and Islam could under no circumstances coincide together in the same sphere. This is due to the fact that firstly, communism is perceived as a materialistic philosophy that recognizes only what can be physically and sensorially perceived.

This goes against the main tenant of Islam, whereby Muslims worship a god that they cannot see, abiding by his laws and rules without experiencing a physical apparition of such. Secondly, communism holds no interest in spirituality and godliness within its tenants. Which results in Islam being labelled as un-scientific, and to Qutb this is closer to Kufr than it is to an economic regime. Thirdly, individuals in communism are shaped by the structure, society supersedes individualism- this in hindsight can be considered rather paradoxical, as Qutb perceived the umma as an all-inclusive human body, similarly to communism ignoring the individualism of

Muslims for the sake of an umma.

Contrarily Qutb argues that Islam provides human beings with agency, perceiving them as active agents in possession of their own free will, while remaining subject to god's free will.

Disease and pollution are also seen in Qutb's writings, whereby he depicts communism, secularism, and existing political governance as illnesses that ail the Muslim umma.

He treats the concepts he opposed as disease that should be remedied, which in turn depicts the umma in the form of a body, riddled by disease that needs to be fixed-in his case he saw the umma extinct and in need of rebirth, similar to an embryo that grows in a mother's womb.

In this framework, communism is considered to be the disease, it is considered to be something unholy, marring the spirit of Islam and therefore as a result, the umma.

When it comes to political governance, (Bouzarinejad, Zarpeyma, & Marandi, 2016) discussed the views of Qutb regarding the fact that political governance had become toxic to the extent that it was one of the main influences on the disease ailing the umma. It was in their writings that they stated that Qutb rejected human sovereignty, mainly due to its rejection of the rule of God. whereby political systems established their own rules and laws, different from the laws of God "Shari'a", and that this in itself is against the very basis of Islam.

As Islam had already had its own laws and regulations, that needed to be applied and followed in order to create balance and order, providing the perfect environment for the umma to bloom into its full effect.

Qutb's dialect began with his rejection of the governing bodies of the Islamic societies. He stated that current governments were not strong enough, nor were they deserving enough to be presiding over Islamic nations, and that this in turn was hindering the resurgence of the Muslim umma rather than participating in its rebirth.

Calvert (2004) highlighted notions set forth by Qutb, as he discussed political myth and the resurgence of Islamism by emphasising Qutb's ideas in regards of political governance. Qutb believed that current governments ruling over the Arab world, were heavily influenced, and impacted by western secularism, and dissident ideologies. This was reinforced by Qutb's belief that western-dominated governments and world order were in the grip of spiritual decline and decadence (Calvert, p.509, 2004). Qutb's words in depicting this decline can be analysed side by side with Douglas' concepts of purity, firstly due to the fact that he perceives western-influenced governments as diseased and ill, and secondly due to his firm belief that islamically inclined politics were a necessary for the growth of an all-inclusive Islamic umma. This second aspect is in line with Douglas' theories on socially constructed beliefs and how governments or rulers, and thinkers construct their ideas methodically in order to attract and entice as many believers and supporters as they can.

While Qutb chooses to focus on the Islamic aspect of governance, and the fact that religion should be the main tenant for governing, Douglas on the other hand chooses not to define religion at all. But instead, she compares the views mankind about their destiny and their place in the universe (Welbourn, 1970). She mainly focuses on how individuals choose to exploit the environment surrounding them to their best interest, and here this can be directly reflected in the course of action that Qutb undertook in order to emphasise his thoughts and ideologies. By depicting the politics and methods of governance as "secular" and unsuitable for the tenants of Islam, he manipulates this to reinforce his ideas of a more suitable method of "Shari'a" governed societies to shape society in a way he finds to be suitable as grounds for the resurgence of the umma.

Douglas (1966, pp.39-50) discusses the ways through which: that which is considered an anomaly can be managed or confronted. She argues that there are several ways to treat anomalies.

First of which is the negative prospect, which revolves around completely ignoring them which leads to the issue not being observable to begin with, and hence there is nothing there to condemn or enhance. Alternatively, it can also be viewed from a more positive perspective, whereby the anomaly can be identified and deliberately confronted to try and create a new pattern of reality in which it has a place.

The positive lens through which Douglas views interacting or dealing with anomalies, can be observed in the behaviour and writings of Qutb. However, he goes about it in a slightly different method.

As Qutb perceives the umma to be riddled with ailments and as he stated “extinct”, he views this in itself as the anomaly. Instead of creating a new pattern of reality within which this ailment of the umma would fit, he saw fitting that society is in need to rebuild and revaluation in order to accommodate a new version of the umma to ensure its rebirth and survival.

In her writings on society and culture, Douglas (1970, pp.153-154) mentions in her book natural symbols that the mind is tied hand and foot, bound by the socially generated categories of culture. She states that any small shift in these definitions, accordingly, will result inevitably in bloodshed if people deem it worthy of such.

In a system where this ideology dominates, the code of purity and cleanliness sets up a distinction between the private and the public. Douglas highlights the eruption that takes place as a result of such incidents, deducing that with the transition of individuals from one social status to another, results in contamination and impurity. This can be seen reflected in the language and discourse used by Qutb when he breaks apart the reasons behind the disease and eventual extinction of the umma.

In his writings and analysis, Qutb does not show interest in expanding the umma, as this would mean bringing in elements from the external sphere- those which he considers to be others- into the internal sphere that he perceives as the umma.

Qutb seems more interested in further involving Arabs and Muslims into the rebirth of the umma, than he is with adding more Muslims into the umma's ranks. This can be linked to the fact that he believed that the west-the other-to be outsiders to the cause, as pollutants who would only participate in the further devolution of the umma.

In his writings, he doesn't discuss adding more Muslims from the outside, he focuses more on the resurgence of the umma, and he does this by creating a divide in the minds of Arabs and Muslims who are already deemed as such, with no plans or rhetoric on increasing the number of Muslims through da'wa-the call to Islam. He is more centred towards creating a resurgence from the Muslim population that is already in existence, and that all who are not considered to be a part of it should be considered as apostles who only participate in the demise of Islam and the Islamic umma. Deeming them unworthy of surviving in tandem with the umma, and that the world must be rid of them in order for the Islamic umma to rise once more from the ashes.

Douglas' view on this distinction, is that when there is limited contact with others this will inevitably cause tension, and result in ineffective organisation which in turn will contribute to the birth of a closed community with a lack of tolerance for imperfections. Which when examining Qutb's rhetoric can be seen in the following way. If the Islamic umma was to restrict its interactions with none other but its existing members, with the sense of ostracizing the other this will eventually result in it collapsing on itself. When a social structure, or a society is so cut off from the elements surrounding it, eventually it becomes ostracised. It becomes the feared other in itself, it is no longer welcoming, it is not deemed safe or secure to interact with. It becomes a threat, resulting in the internal or individual system seeing itself as shunned and rejected, becoming the zero-point evil.

In Douglas' natural symbols, she creates an analysis system to identify the relationship between patterns that are likely to develop recognizable trends in society. The grid she creates is divided into public and private systems of

classifications, and ego increasingly independent of other people's pressure and the group ego increasingly controlled by other people's pressure.

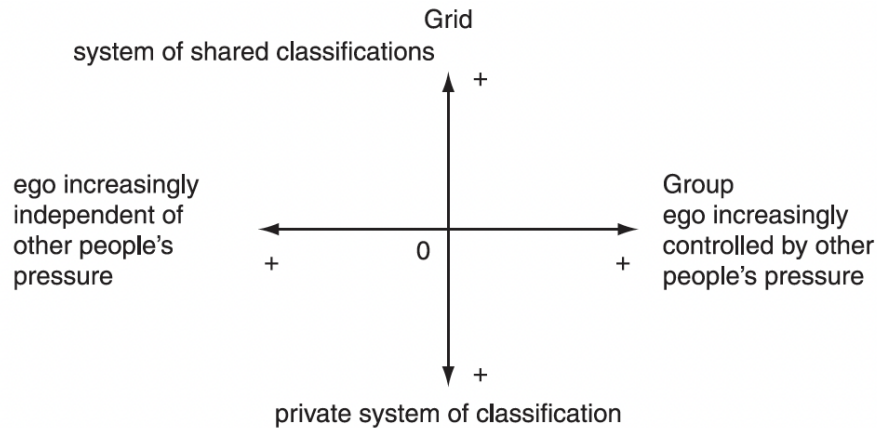


Diagram 1

By examining this grid, it becomes easier to identify the criteria and strategy that Qutb followed to ensure his ideology becomes more widespread and acceptable.

In his book *Islam and the problems of civilizations*, Qutb strikes against the west and foreign influence by stating that the development the west has reached is nothing but the result of the success of deviancy. That there was no balance between nature and nurture, that nurture and instinct were that which dominates the western society, manifesting as deviancy both socially and sexually. Resulting in a rotten society that lacks order and standards. His language is constantly comparing western standards of life, such as theatre, music, socialism, communism, and secularism as a disease, as something dirty polluting the world and as a result oozing pollution into governance and governing systems.

Observing this from the lens of Douglas' grid, allows us to see how he was using pressure of religion and the aspect of the purity and cleanliness of Islam to control the "group ego" which in this case refers to their morality, their standards, and their ideas.

Qutb (1954, pp. 166-185) managed to word his ideas so intricately in order to showcase the purity of Islam, he then goes on to discuss how to seek redemption

from this poisonous world, and these artificial civilizations.

He first begins by emphasizing the crime against the world, and the threats towards humanity whose mere existence is leading towards the extinction of the societies that have supposedly reached the peak of civilisation. Qutb here uses a rhetoric of sympathy, stating that executing this civilisation or society is not the most suitable solution offered by humanity. As humans we have no authority to issue a sentence of execution, as it is the natural outcome of humanity and that it is so engrained into history and present to fulfil a natural human need; it is not a civilization that can be subject to execution.

Instead of using a violent rhetoric that could signal the extermination of a disease, or sickness. He chooses to use language of healing and learning, and that the only way to heal this dominating evil would be better knowledge of oneself. As this knowledge will enable us to understand the mechanical processes of modern life that impacts our being and our bodies, and that this would be how we learn to adapt ourselves to our surrounding influences, and how to change them, and if all else fails how to revolt against them.

His vision for an ideal society and umma, is guided by the notion that there is no other way to stop the devastation of civilisation on the human entity other than religion. As religion in its best version is merely a spiritual activity, ethical order, and a connection to what lies beyond the understanding of the mind.

Qutb saw Islam as the religion that connects all three of these previous elements with true pure science, that it is the responsibility of Muslims to bear the burden of purifying the world from disease and impurity, that salvation is a road to which only Muslims have the map to and that it was their duty to create this road for humanity and guide them along it.

Qutb continues by stating that there is only one doctrine that could extend a helping hand to rescue humanity from eternal damnation, the road to salvation, he highlights how this doctrine is to be presented to humanity, along with how this road to salvation must be legislated in his chapter on the road to salvation (1954, pp. 185-198).

The doctrine that would lead to salvation to him was Islam. He states that humanity does not usually respond to a heard or read doctrine, and that instead it responds better to a doctrine which is alive, embodies, represented in a group of humans, that can be translated and seen by the eye, touched by the hand, and whose impact and influences are witnessed by the mind. That humanity can only respond to the doctrine of Islam, embodied in the image represented by the umma.

He argues that the umma, is the true representation of what Islam preaches and that in order for humanity to follow this doctrine they need to see the live activeness and embodiment of a true Islamic umma. That the umma is Islam personified, whereby the characteristics and advantages of Islam are displayed for all to see and witness.

He argues that the enemies of Islam including Zionists, and colonial Christianity are aware of the influence an umma from personified Islam can pose against them, and due to this constant threat, they sense they are allowing Islam to exist with boundaries and limitations that would prevent it from reaching its full and true potential for all to see and bear witness to.

These groups would never allow the rise or birth of an Islamic community or umma, they do this through their magnanimous power and authority, both hidden and apparent and would never allow the rise of an umma even if it's in an island in the middle of the ocean.

Colonial Christians and Zionists are aware that this is the only true way for Islam to exist, and as they have suffered due to the existence of Islam as it has acted as a buffer between them and their colonial manipulative goals towards the Islamic society and Islamic nations, that it was their ultimate goal to destroy the grandeur of Islam as they fear its spirit and have no desire to allow it to continue realistically anyway.

Qutb follows this by stating that Islam and the Islamic umma despite all that which fights against it, is the only road to salvation for humanity threatened by destruction and devastation. That it is the only response for the call of nature in times of need, and that nature during times of danger is always wary and

operational regardless of how dormant or unwell it is. He argues that Islam is a human necessity, and that the incentives for its emergence are much stronger than any debilitating force. That it is stronger than Zionism and colonialism, and stronger than all the dominating powers world-wide, and even stronger than the ignorance of Muslims themselves of Islam, and their states and their general overwhelm with public opinion and general tides.

To him, the rise of an Islam umma or community was inevitable. His opinion is a perfect reflection of Douglas' rhetoric on symbolism and the importance of them both internally and expressively. Qutb in this sphere, manages to shape the rhetoric of Islam into the salvation of humanity, formulating it in a way where it is inevitable that Muslims worldwide will feel the urge to follow through and abide by the expressive teachings of Islam in order to seek salvation and escape damnation.

The inevitability of the rise of Islam and the Muslim umma does not go unnoticed in the writings of Qutb, as he refers to it as a human need to rescue humanity. His language of conviction is heavily centred on feelings of damnation, hell, and the destruction of the world, arguing that all western notions are bound to kill us all, driving not only the Islamic umma into extinction but in fact the entire world.

He then goes once more to compare the rise of Islam to a mother's labour, that in order for there to be a successful birth, the world similar to a female figure must struggle through the tedious process of labour. That once this labour and this pain are undergone and tolerated, the birth of the Islamic umma will bring happiness and satisfaction all around.

He goes forth to explain that this pain is necessary, as attempting to enforce legislative guidelines with an Islamic origin to face a non-Islamic community is difficult as can be. Especially with the fact that society condemns Islam and does not acknowledge that Islam should be its doctrine and cannot abide by the Shari'a put forth by Islam.

Qutb concludes by saying that Islamic jurisprudence cannot grow and develop and confront the troubles of life and society if this doesn't happen within a

realistic Islamic community factually existent. That it is joke worthy to attempt to find Islamic jurisprudence judgments or opinions to the social or economic situations in the US or Russia as they both do not adhere to the teachings of Islam. That the problems of modern society in confrontation of modern civilisation and developments are not the problems of an “Islamic community”, as this community or umma is not existent just yet. This distinction shows that Qutb predicts the inevitability of this umma being created, that while it may not exist just yet, it will flourish and come to be at a certain point not too far into the future. That what humanity misses is not the rise of an Islamic umma guided by Islamic jurisprudence, but instead it lacks the basic principle of Islam as a sharia ‘a. that for Islamic jurisprudence to evolve, it must first find the soil within which it will grow. That the soil, is an Islamic umma surviving within modern times, facing issues that are already existent on its own, and that the way this Islamic umma would confront these issues will never be the same as other communities attempting to do the same.

The Debate on The Sudanese Depiction in Egypt

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Abstract:

Egypt has always been a cosmopolitan country that attracts various populations across the world (Grabska, 2006). One of the largest communities living in Egypt is the Sudanese one, and studying the relationship between both communities had a large debate in the literature. According to Moro (2004), Egypt and Sudan are having a profound historical relationship that influenced the movement of Egyptians and Sudanese across the borders of both countries. This relationship started with the annexing of Sudan in 1826 by the Ottoman ruler, Muhammad Ali, and went through various Phases that directly affected this relationship

When it comes to studying the status quo of the Sudanese community in Egypt, the literature is usually focused on the historical relationship between both countries and how, at some point in history, they were legally united as the Kingdom of Egypt and Sudan. Additionally, both Egyptian and Sudanese literature focus on the ups and downs they went to throughout history. Therefore, to better analyze how Sudanese are living in Egypt, the paper focused on the Sudanese perspective as well as the Egyptian one, in addition, to fully understanding the policies and agreements between both countries that might affect their relationship. It shed the light on the engagement of Egyptian society with other communities living in it generally and specified in the Sudanese one. Consequently, the paper tests to what extent the Sudanese living in Egypt are having a satisfactory livelihood. The decision to study the subjective experience of Sudanese in Egypt requires a methodology that targets both, state and individual levels of analysis. Therefore, the paper used a qualitative methodology based on primary sources such as policies, agreements, speeches, and interviews. Besides, it used the cultural theory/approach to evaluate how culture might contribute to

shaping the depiction of Sudanese among Egyptians.

The paper will be divided into three main parts. The first part will tackle the main policies and agreements that shaped the relationship between both countries. The second part will analyze the status quo of the Sudanese living in Egypt from the Egyptian and Sudanese perspectives. Lastly, the third part will focus on the findings and mainly the reason behind the depiction of Sudanese among Egyptians.

Introduction

Egypt has always been a cosmopolitan country that attracts various populations across the world (Grabska, 2006). One of the largest communities living in Egypt is the Sudanese one, and studying the relationship between both communities had a large debate in the literature. According to Moro (2004), Egypt and Sudan have a profound historical relationship that influenced the movement of Egyptians and Sudanese across the borders of both countries. This relationship started with the annexing of Sudan in 1826 by, Muhammad Ali Pasha, and went through various phases that directly affected this relationship.

The relationship between Sudanese and Egyptians has gone through many ups and downs. Without a doubt, the political framework in both countries directly affected the relationship between both communities. This research is mainly focused on the relationship between both communities and accordingly the depiction of Sudanese among Egyptians. It tests the extent to which the Sudanese living in Egypt are integrated with Egyptians.

While conducting an in-depth analysis of the relationship between Sudanese and Egyptians, it has been noticed that there are various differences between English and Arabic literature. English literature always inclined to how Sudanese are being harassed and faced a lot of difficulties in their living in Egypt. However, Arabic literature focuses on how strong and harmonic the relationship between Egypt and Sudan is (ElSayed, 2023).

Historical Context: Waves of Sudanese Migration to Egypt

Sudan is one of the countries that significantly went through various phases. Unfortunately, civil wars played a huge part in these phases. It has been widely known that Sudan experienced two major civil wars. The first one started in 1956 and lasted until 1972, and the second one was from 1983 until 2005 (Petrini, 2014, p. 52). Unfortunately, in mid-April 2023, history repeated itself and Sudan went into another civil war as a result of fighting between the Sudan Armed Forces (SAF) and the 'Rapid Support Forces (RSF)' (Braunschweiger & Osman, 2023).

It has been stated that the significant waves of Sudanese who fled to Egypt were the result of the two major civil wars that Sudan experienced. The first one was in 1955 when the 'Sudanese Defense Force' fought against the 'Southern Liberation Movement' called 'Anyanya'. The southern movement opposed the Islamization policies that were adopted at that time and requested the autonomy of Southern Sudan. The First Civil War went through two phases, the first phase was in 1955 as mentioned before, and the second one was when the Islamic Sharia Law was officially imposed by President Numeiri in 1983. Beyond any doubt, the two civil wars caused the loss of millions of Sudanese lives, fleeing millions to other neighboring countries, and many disasters such as famine. In the second phase of the First Civil War, the only two countries that supported Sudan were Libya and Egypt. Accordingly, and as a result of the Egyptian support, the Soviet Union joined the supported countries by providing more than \$150 million and more than 1,000 Soviet military personnel, to assist the SDF in their war with Anyanya (Adar, 1998). Egypt was clearly standing with Sudan at that time, however, when President Numeiri imposed the Sharia Law, the Egyptian stance started to change because of the fear of rising Islamic fundamentalism from Sudan.

In terms of the second wave of Sudanese migration, they started to flee in the mid-1980s, as the result of the Second Sudanese Civil War. During this war, the 'National Islamic Front' was against the 'Sudan People's Liberation Movement' since they were different in how they needed Sudan to be formulated. The NIF was promoting the idea of applying political Islam and building the country on Sharia

and Islamic basis, However, the SPLM was against spreading Sharia basis and was promoting secularism. Both parties were different in how they saw 'Sudan'. The NIF believed that Sudan should have an Islamic and Arabic political identity. On the contrary, the SPLM stressed how important the differences between people are and the concept of Sudanese has to be related to the diversity among people (Basha, 2006, p. 67). Unfortunately, this war lasted until 2005. The result of this civil war was an agreement signed between the 'Sudan People's Liberation Movement' and the Sudanese government, and that was the reason behind the end of this war (Assal, 2007, p. 5).

Sudanese in Egypt: Policies and Agreements

According to Jacobsen et al. (2014), Egypt and Sudan signed a treaty called the 'Wadi El-Nile' treaty in 1976. This treaty granted the Sudanese the right to residency and work in Egypt, in addition to entering the country without a visa. While this treaty was implemented, the Egyptians and Sudanese were living in harmony and the challenges that the Sudanese usually faced started to diminish. However, according to the author, a famous incident occurred in 1995, that turned the relationship between both countries upside down. The Egyptian president Mohamed Hosny Mubarak faced an assassination attempt in Addis Ababa and some Sudanese Islamists were accused of this incident. Accordingly, the 'Wadi El-Nile' treaty was revoked and the living of Sudanese in Egypt started to take another shape. Sudanese were obligated to apply for residence permit visas and asylum seekers had to follow the regular asylum channels. The Addis Ababa event and what the Egyptian government implemented changed the attitude of both communities toward each other. Adam (2012) mentioned that Egyptian officials usually used terms that indicate the strong tie between both communities such as 'ikwa al-Sudaniyeen' which means that Sudanese are Egyptian brothers, and also the term 'ibn al-Neel' which means the son of the Nile. Unfortunately, these terms were changed after 1995 and replaced by other terms such as 'aganib' and 'agnabi'. This was not only the case, Egyptians at that time started to perceive that the existence of Sudanese contributed to the economic challenges that Egypt

faced at that time.

In the 2000s and specifically in 2004, the relationship between Egypt and Sudan started to take another path. According to Mohyeldeen (2020) and Ahram Online (2017) Egypt and Sudan signed the 'Four Freedom Agreement' in 2004 that granted the Sudanese the right to work, reside, move, and ownership of property. As a result, Sudanese started to enter Egypt freely without a visa. It can be clearly considered to be a return to the 'Wadi El-Nile' agreement

Defining Sudanese Identity

While the analysis of the research focused on the depiction of Sudanese among Egyptians, it is important to know that this depiction is directly related to the Sudanese identity. To demonstrate, to analyze how Egyptians see the Sudanese, it is important to know how Sudanese see themselves either in their homeland or in the host country.

The discussion on the Sudanese identity attracted many researchers for a long period of time. Based on the (Manaa, 2019, p. 41) analysis, the Sudanese identity refers to the Arab African identity due to the African origin and the Arab migration. Arabs ruled Sudan for a long period of time, however, not all Sudanese agreed on this perception since some of them believed that their identity should not be categorized under 'Arabs' only, but 'Africans' as well. In the 1980s, the debate on the Sudanese identity started to take place widely, especially during the Darfur disputes. At that time, Sudanese were grouping themselves into Arabs and non-Arabs. Moreover, in 1989, when the Sudanese Coup d' état occurred, the Sudanese identity started to take another track. The military officer at that time was Omar Al-Bashir who was supported by the National Islamic Front. Accordingly, there were a lot of trials to shape the Sudanese identity inside the Islamic frame. In the midst of this period, the Egyptian-Sudanese relationship started to degenerate. The Sudanese decision-makers who were supported by the National Islamic Front and Omar Al-Bashir started to portray Egypt as a secular country that had objections and concerns about the Islamic vision that Sudan wanted to follow and adopt. This portrayal was not verbal only but included many decisions that

hardly affected the relationship between both countries. Since education was a vital tool, Sudan's decision-makers emphasized how secular education is and the importance of how Islamic it should be. Accordingly, Sudan closed many Egyptian universities, schools, and educational missions that were not Islamic as they wanted. Unfortunately, Egyptian artists that time, who were living in Sudan were exposed to many kinds of harassment, and some of them were obligated to leave the country. Besides, it has been stated that many extremists were encouraged by Sudan at that time to oppose the system in Egypt (Taha, 2001, p. 101).

Based on Taha's (2002, p. 103) observation, some Sudanese were informed that Egypt had desires in concerning Sudan. It was not just opinions and perceptions, rather, Sudanese children in schools in the period from 1821 until 1952 were taught that the military campaign that Mohamed Ali Pasha led to Sudan was to search for gold and recruit slaves. Accordingly, the perception that has been settled in the children's minds is that the main goal of Egypt is to expand. These misperceptions and misleading information acted as a catalyst for disputes between the two countries and even between the citizens themselves. This was obvious in the conflicts that occurred between the two countries regarding 'Halayb' and the 'Nile Agreement'. However, these misperceptions did not last long and disappeared once the disputes were solved. Nevertheless, what the Sudanese believed affected their relationship with the citizens of the country they lived in. To clear up, when it comes to defining the Sudanese identity especially if they are not in their homeland, they have their own perception of how the country they live in sees them and most importantly, how they see themselves in this country. By way of example, those Sudanese who believe that their identity belongs to the African solidarity rather than the Arabic identity, stated that Egypt treated refugees and other communities in a different way from each other. They believed that the Egyptian government treated the Arab refugees better than the African ones. Therefore, they see themselves as categorized in a specific category and see the country does not treat this category in a good way. The insight required here is that it is a kind of brainwashing to serve personal interests (Norman, 2017). The idea

here is that the Sudanese identity might not be categorized under the African one, and Egypt is not treating them differently, and the significant proof is that the Sudanese themselves are different in how they see themselves. Treating them differently according to the categories they made is not a logical perception. The only proof of what Sudanese are faced with is the policies applied to them and the way it is implemented.

Identity is not only the factor that can contribute to shaping people's attitudes toward each other. Focusing on the culture when analyzing the relationship between both communities is very important. According to ElSayed (2023), culture is very much related to identity and self-belonging. Although the idea of 'Culture' is explained differently by people, there is no doubt that it highly contributes to enhancing or weakening the relationship between communities. Culture is rooted among people and what they follow is what they strongly believe in. Therefore, they can easily do their best to defend what they believe in.

Egypt as A Destination for Sudanese: Reasons and Considerations

Egypt as a host country usually identified as a transit country by many asylum seekers and refugees including Sudanese. The majority of people who flee to Egypt prefer to stay in it for some time until they prepare their documents and move to a final destination. However, some reports from the 'International Organization for Migration' indicated that some asylum seekers and refugees who planned to stay in Egypt for a short time changed their minds and extended their stay in case they faced difficulty in living (Syed, 2000, p. 3)

It has been discussed by Davis et al. (2017, p. 28) that any host country that receives migrants usually implements some models in terms of their integration. A country can follow the full-exclusive model which directly ignores the presence of migrants and refugees, or the semi-exclusion model. The latter model usually welcomes the refugees at the beginning but the policies related to them, however over time, these policies changed to restrictive ones on exit, entry, or legal status. Davis et al. suggested that Egypt neither implement fully excluded nor included

policies. Egypt as a country has always been inclined to maintain the status quo.

The question that might be raised here is, why do some Sudanese choose to flee to Egypt specifically? It has been stated that there are many factors contributing to the answer to this question. Petrini (2014, p. 52) answered the question by mentioning how the geographic factor facilitates access to countries. Egypt's geographic location is an easy choice in terms of accessing it via the Nile, land, or even the Red Sea. Also, the historical relationship between both countries encouraged Sudanese to decide to move to Egypt. In terms of historical relations, Great Britain's colonial domination had to be included as it allowed more labor migration and trade. Accordingly, a large number of Sudanese communities were created in Egypt that include both, merchants and business owners. Although many researchers pointed out the expansion of the Sudanese communities in Egypt when they fled to it. However, there have been many discussions that many of them have a shortage in their basic rights and face a lack of many services.

In the late 1980s, it has been noted that a large number of Sudanese decided to move to Egypt. When it comes to specifically where they are coming from, the majority came from the Southern part and only the minority came from the North. At that time, the number of Sudanese asylum seekers started to significantly increase in Egypt and therefore some decisions started to take place. In 1994, the Egyptian government started to take action and asked the UNHCR to implement their 'Refugee Status Determination' (Al-Sharmani, 2014, p. 58). Al-Sharmani added that many analyses resulted in indicating whether Sudanese moved to Egypt directly from Sudan or other countries. Sudanese who came from the western and southern parts chose to move to Egypt directly to their homeland. On the contrary, Sudanese who originated from the northern Sudan went first to the Gulf or Libya and then moved to Egypt. Moving from their homeland directly or not has nothing to do with the reasons why they left. Both categories moved to Egypt for the sake of more security, as the situation kept deteriorating. Many Sudanese faced various kinds of religious and political persecution, in addition to their fear of being mobilized. Moreover, they always want to enhance their life

standard including chasing more appropriate educational opportunities. Before 1995, Sudanese entered Egypt by land, by flying to the capital, or by train to Wadi Halfa and then took a steamer to Aswan. As mentioned before, this was not the case after the assassination attempt of the Egyptian president, Hosny Mubarak in Addis Ababa. Implementing new rules on the Sudanese living in Egypt was not entirely on how they entered Egypt, rather, according to Mohyeldeen (2020) the Egyptian government started to treat the Sudanese after the incident as foreigners. It has been stated that Sudanese children were not able to enroll in Egyptian schools and universities. These decisions were not from the Egyptian side only, rather, the Sudanese government had a tough response as well. Following the 1995 incident, the Sudanese government shut down the Cairo University in Khartoum together with many Egyptian businesses there. At the same time, according to Darwish's (2018) analysis, Egypt requested the 'United Nations' to impose Sanctions on Sudan, and this was successfully applied.

Egyptian-Sudanese relationship: Ups and Downs

In regards to how the relationship between Egypt and Sudan was having ups and downs, One of the most significant events that indicates how strong the relationship between Sudan and Egypt is what happened in 1979. It has been stated that Sudan was the only Arab country that showed support to Mohamed Anwar El Sadat, the Egyptian President at that time; when he signed the Camp David Accords with Israel. Moreover, Sudan announced its rejection of the decision of the Arab League in terms of cutting off diplomatic relations with Tel Aviv (Adar, 1998). Afterward and especially the period between 1989 and 1996, the relationship between Egypt and Sudan witnessed a phase where both countries were not on good terms. Shaban (2018, p. 16) stated that Sudan at that time was providing a good environment for some extremists who left Egi to practice and train. This was intensified in 1995, when the incident of the assassination attempt of Egyptian President, Mohamed Hosni Mubarak took place. If the Sudanese decision-makers were aware of the consequences that happened as the result of training these extremists, they might not agree on involving themselves in this

process. Shaban (2018, p. 16) added that in 1991 the 'Halayb' issue was raised when the Sudanese government declared an auction for gas drilling at this place. Accordingly, Egypt warned more than 100 gas companies to proceed with Sudan and officially declared that any agreement on 'Halayb' would be considered a direct violation of Egyptian sovereignty. Therefore, the Sudanese Vice President visited Egypt at that time and formed a committee to solve the issue and enhance the relationship between both countries.

It is normal that at some point in history, countries might disagree and their relationship might take another track. However, the most important thing is that both countries have the intention to restore this relationship, especially if they have strong historical, cultural, economic, or political ties.

Egyptian-Sudanese Relationship: Fostering Connections Across Borders

As per the 'Convention of the Rights of the Child', Egypt focuses on education, especially the primary one, and grants all children the right to be educated whether their nationality is Egyptian or any other one (Zohry, 2021). This is not only implemented for Sudanese who are living in Egypt, rather it is rooted a long time ago. When Egypt and Britain were governing Sudan through binary governance, the role of Egypt in education was prominent. A variety of middle and high schools opened in Sudan at that time. Moreover, Egypt welcomed all Sudanese who came to the country to complete their education journey in Dar El Olom, Al Azhar, and many other Egyptian universities. Also, The Minister of Education in Egypt, El Sanhory Pasha, after WWII, granted many scholarships to Sudanese to study at famous Egyptian universities and institutions. As a result, the Sudanese who studied in Egypt were well educated to the extent that when they got back to their country and took important positions in it. It is also important to mention that in 1955, the Cairo University in Khartoum was established. Sudanese who were educated in later universities had a huge experience and wide information in many aspects of life, especially in literature and law. Therefore, Sudanese graduates from Cairo University in Khartoum were very beneficial to their society (El Sedek, 2016, p. 180).

The Egyptian government has always been the actor that works to enhance the relationship between both countries. Apart from the variety of educational opportunities that Egypt provided in various forms, other forms of enhancement took place. For instance, in 1948, there was a decision from the 'Higher Council for Integration' to create the 'Wadi El Nile' radio. This radio was focused a lot on the Egyptian-Sudanese relations. One year later, in 1949, The official Egyptian Radio started to assign a 15-minute weekly to the Sudanese broadcast. This broadcast mainly included their news and songs. It was a good initiative that helped the Sudanese to feel how they were integrated into the Egyptian community. Later on, this broadcast changed to a segregated Sudanese Radia that had its own broadcast (Ibrahim, 2015, p. 168).

The efforts of Egypt to enhance the relationship with Sudan were not a one-way approach. The Sudanese government was taking all opportunities found to maintain this good relationship. This was obvious in 1958, when the Sudanese army took over Sudan, under the command of 'Lieutenant General Ibrahim Abboud'. The focus at that time was on the Egyptian-Sudanese relations. He announced clearly and directly that he had a strong intention to rebuild good relations with the 'United Arab Republic' and dismantle the 'artificial gulf' between Egypt and Sudan. As a result, the Egyptian President at that time, Gamal Abdel Nasser, welcomed this initiative and declared that Egypt was ready for any consolidations in terms of the relationship between Sudan and the U.A.R. (Baddour, 1960, p. 231).

The Subjective Experience of Sudanese in Egypt

As per Al Bayan's (2010) analysis, Sudanese citizens who are living in Egypt usually prefer to live near each other in the same neighborhood. They called the neighborhood that includes much Sudanese living together '*Gheto*'. Earlier in the past, Sudanese were scattered in many governments in Egypt such as Alexandria, Suez, Ismailia, and Aswan. However, the new generation prefers to live in the capital. The majority of the new wave does not know much about living in Egypt; therefore, they always seek help from their peers. The young Sudanese

who lived most of their lives in Egypt are not familiar with their homeland. Therefore, there are some initiatives from NGOs and Sudanese associations promoting the idea of paying more visits to Sudan.

There is a famous district in a street called 'Abdel Khale Tharwat' where a large number of Sudanese living there. The district is named 'Al Sufy' and includes a large travel agency that usually provides trips from Cairo to Khartoum. Whenever anyone passes by this district will find many restaurants and shops that have the Sudanese flavor. Many restaurants in 'Al Sufy' serve Sudanese recipes and buy Sudanese 'Henna' and perfumes. Sudanese always gather in this district to have the feeling of home (Khames, 2021). Many Sudanese prefer to go to Alexandria in summer to have their vacation. They do not prefer to go to Upper Egypt unless they want to recall their memories in Sudan. Many Sudanese believe that the culture and traditions in Sudan are similar to the ones in Upper Egypt. Sudanese are very attached to each other and keen on gathering and celebrating their official celebrations together every year, especially the 'Sudanese Independent Day'. On this day, university students (majority from Cairo & Ain Shams universities) gather under the umbrella of 'The Sudan Ministry in Egypt'.to be able to share their talents and connect more with each other. Accordingly, the Sudanese community gets to know each other (Shanh & Abbas, 2019). These traditions are very important for both the Sudanese and Egyptian sides. Without any doubt, connecting the Sudanese together caused more familiarity and willingness to their living in Egypt, and this directly affected their relationship with Egyptians as well. The more the Sudanese are happy and satisfied in the country, the fewer challenges they will face with Egyptian citizens.

In terms of the Sudanese associations in Egypt, there are an average of 35 Sudanese associations, some of them are registered with the 'Egyptian Ministry of Social Affairs' and others are not registered. It has been noticed that Sudanese whose mothers are Egyptian are not closely connected to these associations, rather, they get back to it in urgent cases, or if they have serious problems that need to involvement of the Sudanese Embassy in Egypt. The only thing that has

been observed is the lack of job offers and training provided by these associations (Ramadan, 2019). Moreover, and as per ElSayed (2023) in the progress thesis, there is an application that brings ex-pats together including Sudanese. This application is called 'InterNations', and this allows them to be connected to each other in the right way.

Daughtry (2005, p. 94) studied the status of Sudanese living in Egypt and their experience there. He noticed that during the time of his fieldwork, Egyptian citizens were very welcoming to the Sudanese. They were moved freely and were free to choose their residential location. In terms of where Sudanese were living in Egypt, the author mentioned that the majority of southern Sudanese were living in single-family apartments and all over Cairo. The main challenge they faced at that time was paying the rent of these apartments, as some of them sometimes paid double and triple what Egyptians paid since Egyptians were protected by the laws of rent- control. Daughtry took note of where exactly the Sudanese preferred to live. In fact, they prefer many areas such as Nasr City, Abbasiyya, Maadi, and Heliopolis. However, the majority usually focus on the areas that are close to metro stops and have easier access to public transportation such as Hadayek Al Quba, Masaken El Helmia, and Hadayek Al Maadi.

In terms of what the Egyptian government offers to the Sudanese, it has been reported that there are some education centers in Egypt that are mainly focused on assisting the Sudanese at different levels. One of these centers is called 'Al Tadamon'. The workers in this center are mainly volunteers and they work on enhancing the education level of Sudanese children from 6 to 18 years old. In this center, Sudanese have classes to be able to learn the Sudanese curriculum. The center does not exclusively focus on studying, rather they focus also on many activities such as art and music. In terms of the efforts of the Egyptian government, Egypt supported some NGOs and education centers by allowing them to educate African refugees by providing them with private classes. However, their exams have to be in an Egyptian private school (Kamel, 2018).

Although some researchers argue that Egyptians are very welcoming to the

Sudanese communities, there are some challenges that Sudanese face in Egypt that might hinder the process of integration with the Egyptian community. One of the most prominent challenges is the language barrier. According to ElSayed (2023), the differences in the language were a challenge to the extent that some interviews that were conducted with Sudanese were totally unclear due to the difficulty in understanding their accent. This was obvious with the Sudanese elder people only. Another challenge that some Sudanese face is, unfortunately, there are some studies showing that Sudanese are not treated in a good way during their stay in Egypt. Some Sudanese faced some challenges from young Egyptian men who yelled at them and called them some offensive words because of their difference in skin tone. It has been reported by Miranda (2018) that there are some cases where some Sudanese were called 'Dalma' which means darkness or 'Samara' and 'Chocolate' which refers to the darkness as well. The author continued by saying that some Sudanese were exposed to throwing trash, water, or even stones in the streets. In addition, there was a UNHCR decision that the determination procedures of Sudanese applicants have been suspended. Accordingly in 2005, an initiative by a non-governmental organization called 'Refugee Voices' occurred through a camp sit-in in Mustapha Mahmoud Square, in front of the UNHCR building. The Sudanese in the camp were opposing the decision and the goal of the camp was mainly for more political visibility and mobility. Nevertheless, events went quite differently as the camp started to grow and the initiative evolved into a more complex way. Regrettably, the result of this camp was death cases and the detention of some Sudanese citizens. This incident stands out as one of the significant examples of the political mobilization of migrants and refugees (Pascucci & Ramadan, 2018, p. 7).

Commitment to Sustaining Sudanese Integration

Since mid-April, Egypt received an average of 250,000 Sudanese refugees, and this is according to the fact sheet that the UNHCR published on June 2023. In this report, it has been noted that the registration to enter Egypt has quickened to affirm that access to services is working rapidly (UNHCR, 2023). The Egyptian

response to the recent situation has been discussed in various reports as well, such as Alsharnoby's (2023) report to Sky News. He mentioned that the Egyptian Foreign Affairs declared officially that they welcomed almost 16 thousand citizens and among them, 15 thousand are considered Sudanese citizens. It has been stated in the later report that Egypt does not treat refugees in a way similar to other countries. For example, in Egypt, there are no refugees living in tents. In addition, Sudanese who moved to Egypt and currently live there do not significantly impact the development of the country, and this is due to the fact that a small number of refugees receive support from the NGOs. The majority of civilians who move to Egypt as refugees or other categories depend on themselves and work daily to enhance their lives and earn more money. Therefore, having different nationalities among the county who work hard and earn money can positively affect the economy and enhance the diversity among the society.

In regards to what happened in April 2023 in Sudan, the Egyptian community showed how much they are willing to help the Sudanese during this hard time. It indicates that whatever the relationship between both countries went through, both communities are taking into consideration their strong ties. Although this is not the first, however, both Egyptians and Sudanese always doing their best to help each other without a return. During the recent conflicts in Sudan, according to BBC News (2023), numerous Egyptian citizens started to show support for Sudanese who fled to Egypt through social media. Since Egyptians believe that social media is the most powerful tool nowadays, they started to use social media through hashtags and campaigns to raise awareness about the 'Four Freedom Agreement' that was signed in 2004 between Egypt and Sudan. Both Egyptians and Sudanese believe that although signing the agreement was a turning point, the agreement is not fully implemented. Egyptians started to emphasize how important implementing this agreement is, since a greater degree of freedom might have been granted to Sudanese migrants so that a significant improvement in their living conditions might have occurred. Moreover, The Egyptian activities promoted the idea that Sudanese should not be required to obtain visas while entering Egypt

during this crucial time. This obvious Egyptian support extended beyond its citizens to reach the decision-makers as well. The current Egyptian President, Abdel-Fattah Al Sisi encouraged assisting Sudan, and this was reported publicly on the website of the Egyptian Ministry of Defense website. Therefore, a large Egyptian supply ship under the ownership of the Egyptian Navy arrived in Sudan in June 2023 and carried hundreds of tons of relief aid. These relief aids included essential supplies such as medicine and food. The main goal of the Egyptian government is to provide notable support to the areas in Sudan that were highly affected and deteriorated.

Concluding Remarks and Recommendations

Egypt and Sudan went through various phases. Some phases witnessed a huge flourish between both countries and it directly affected both communities in the society, while other phases witnessed significant deterioration. There are some debates on the fact that the political and economic relationship between Egypt and Sudan directly affects the subjective experience of the Sudanese people who lived in Egypt. However, it has been noted in many situations that regardless of the challenges they face, both countries are focusing on fostering their relationship and enhancing communication between both communities. Although both countries went through various phases, they usually do not forget their historical relationship with each other, or at some point in history, they were called brothers. The majority of the Egyptians themselves had to take into consideration what Sudanese had faced in their country while dealing with them in their everyday life, apart from the Egyptian government's effort to integrate Sudanese among the Egyptians. Being different in some features or differences in language should not be a barrier as long as the people themselves have the good intention to live in the country and contribute to developing and enhancing it.

In regards to the policies and agreements, although there are several agreements to enhance the subjective experience of Sudanese in Egypt, it has been significantly stated that the agreement is not fully implemented. Sudanese are already facing a lot of challenges and various civil wars that led them to be

harmed politically, socially, economically, and even psychologically. The least they can receive is a full implementation of the agreements that countries signed to grant them their right to enjoy a high quality of life.

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Takaful in Islam: A Critical Analysis to Religious Studies in Egyptian Curricula

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Abstract:

Education in Egypt remains as one of the important Aspects which influences the behaviour of the society. Egyptian education went through several stages of development by exposing school curricula into a series of reinterpretations regarding its scientific content. So, school curricula could be analysed as an agent which affects the performance and interactions within the Egyptian society in accordance with the political and economic visions of the state.

This paper will be focusing on the nature, and evolution of the concept of Takaful “Solidarity” within the governmental schools curricula. Moreover, this paper will analyse the Islamic interpretation of solidarity from the social, economic, and cultural dimensions.

Accordingly, this paper argues that the Egyptian state promotes its vision of moderate Islam by placing the theme of Takaful into school curricula. As it would serve as an alternative narrative to the secular and radical visions conceptions within Sunni Islamic thought.

Concurrently, the Egyptian ministry of education proceeded in a series of reforms within the curricula, and specially within the module of religious studies since 2016. Furthermore, religious studies is a compulsory module which aims to regulate the student’s behaviour towards the society in accordance with the Sunni Islamic teachings, and the state’s socio- political vision for national development.

This paper will rely on discourse analysis, by focusing on the concept of Takaful within educational textbooks, scholarly books, articles, recorded lectures and interviews with thinkers concerned with the mentioned theme. The concept of Takaful holds a historical, theological, and pedogeological meaning which influenced Islamic thought “moderate Islamic narrative” during the modern era. Also, Islamic political thought relied thoroughly on the

concept of Takaful to advocate development and prosperity within the society and the state.

Introduction

Takaful in Islam: a Critical Analysis of Religious Studies in Egyptian Curricula

Regarding the concept of Governance, the academic community focuses mainly on the policy making process regarding the economic and administrative fields. Moreover, the meaning of Governance is contested.

The Purpose of this paper is to analyze the importance of religious discourse, Islamic values in influencing the political and social structures of Egyptian state which formulates an Islamic conception of Governance. Furthermore, this conception would be used and validated through the governmental view of religious discourse which could be reflected through the Educational Curriculum. Recent pedagogic reforms were initiated in the Egyptian religious studies curriculum, these changes aim mostly to influence the societal interactions of the society. Also, these reforms would reframe the nature of religious discourse in Egypt. Accordingly, the mentioned propositions would help in conceptualizing the meaning of governance in the Egyptian state.

This paper argues, the Egyptian government implements Islamic idioms as Takaful “social solidarity” within the Curriculum to advocate policies which strengthens its conception of good governance as economic development.

Accordingly, this paper interprets the meaning and effectiveness of governance through its philosophical and theological basis. So, this would suggest the probability that the interpretation of governance regarding the Egyptian state could be associated with Islamic thought.

This paper will rely on Gregory Starett’s theory of master narratives, as it works as a suitable tool to interpret the nature of changes in the Egyptian curriculum. Accordingly, this paper will be divided into three main sections. Accordingly, this

paper will use primary and secondary sources as school curriculum and scholarly books and articles.

First, this section would analyze the meaning of governance regarding Starett's interpretation. Second, the meaning of governance would be analyzed in regard to the religious studies curriculum in Egypt. The Third section would be considered as an analytical part which compares between Starrett's understanding of governance and the Egyptian governmental perspective through the religious studies curriculum.

Towards a progressive view of Islamic thought: using Egypt as a case study

Following the events of 9/11, the rise of Al Qaeda and the extremist insurgencies in Egypt during the late 1990's. The Egyptian government sought to reframe its vision regarding the meaning of Governance and the tools used to sustain it. (Zeghal, 2023, p.107)

Furthermore, the Egyptian case was seen as an important one due to its critical role as a regional power in the Middle east and a key influential figure in the Islamic world. That led to the usage of new and critical tools which would help in conciliating between Islamic thought and modernity.

In his conclusion, Hefner (2007, p.2) mentioned that most of the Islamist groups emerge in places where madares "local schools" where teachers or students foster terrorists. In other words, the classic narrative of teaching Islamic education would eventually help influencing extremist ideals and motives.

On the other hand, Governments aimed to use education as a tool for socio-political organization. So, Islamic countries as Egypt most notably used education as a tool to limit the ideological influence of the terrorist organizations on the social and political levels.

Hefner's deduction (2007, p.4) would support the mentioned claim, as Islamic knowledge' transmission as a pedagogic framework always dependent on the governments and political authorities. Accordingly, there was a social dilemma regarding the effectiveness of Islamic values and ethics.

Moreover, Muslim theologians and the public opinion questioned the effectiveness of the Islamic thought's validity to advocate socio-economic development. In comparison to western countries, Muslim's public opinion showed Muslims felt decadent regarding their developmental track.

So, countries as Egypt lead a series of socio-political reforms by using the educational curriculum to reframe and institutionalize Islamic thought to be more lenient with the socio-political goals of the government. (Zeghal, p.117)

As Starrett (2010, p.62) mentioned, the transformation of Egyptian Islamic thought was conducted through a state-sponsored ideological framework. Moreover, the state advocated the reframing of the Islamic principles through a narrative which would benefit socio-economic development along with spiritual enlightenment.

Accordingly, the reframing process came through the Egyptian government's efforts to institutionalize education. Also, the Government's aim through religious education is to view that following religious values should lead for social reforms and advocate developmental procedures.

The mentioned proposition could be traced through the narratives used by the Egyptian ministry of education, and the changes which occurred in them. Therefore, educational curriculum serves as a tool to help achieving the socio-political goals of the Egyptian State.

In his conclusion, Starett and Doumato (2008, p.5) mentioned that by analyzing the Curricula of Arab and Islamic countries, five conclusions could be deducted in order to assess the importance of Islamic education.

First, there is a constant mentioning to "Jihad" which its meanings and interpretations were seen either as a declaration of war to defend the Islamic nation, or as an offensive or total war for the glory of Islam.

Second, the usage of Islamic principles and values to cement socio-political stability. Furthermore, the curricula mentioned that Islamic values promotes ideals as nationalism, patriotism. Therefore, sectarian differences and diverse religious interpretations are not mentioned.

Third, there is a master narrative which depicts Muslims as victims and that Islamic

nations are under threat from enemies who wish to end the Islamic values. Fourth, themes and idioms as obedience, and compassion are used to discipline the Islamic youth.

Fifth, despite the usage of the same tactics, the curricula interpreting Islamic thought are different. Furthermore, each government and leadership's ideals influence the narration of the curriculum and the benefit extracted from teaching it to the youth.

In other words, the Egyptian government worked on reframing the themes and idioms placed within the religious studies curriculum. In addition, it would be easy to deduce that the new themes could be used as a tool for empowering socio-economic development.

Themes as Takaful "philanthropy or social solidarity" were used in the curriculum to help in bridging between Islamic values, and the socio-political vision of the state. Furthermore, the implementation of a new curriculum would prove Starett's claim of master narratives. As the government used the curriculum as a mean to advocate for a social consensus which benefits the Egyptian nation while following Islamic teachings.

Takaful: the narrative to aspire for national development

The concept of Takaful was a valid conception used to bridge between the Islamic values and the Egyptian current government view regarding socio-economic development. Moreover, the curriculum proves the validity of the mentioned choice of the concept of takaful. This could be seen by analyzing the Islamic values which reflect the Muslim's spiritual connection with God.

In their conclusion, Hamad, Salah, Mohamed, and Mansour (2022, p. 27) mentioned that the essence of attaining God's grace is by working with gratefulness. Furthermore, the curriculum mentions that by increasing one's experience in work, it would assist him to regulate his social, psychological life. Also, it would assist the working Muslim to regulate his martial life and relationship with his children.

In order to prove its point, the curriculum mentions that working with adherence to God is the key to receive happiness and bliss. This could be found through the Qur'anic verses used in the curriculum, in verse 6 of Surat HUD: There is no moving creature on earth whose provision is not guaranteed by Allah. And He knows where it lives and where it is laid to rest. All is 'written' in a perfect Record. Accordingly, the curriculum mentions that through this verse, God explains to humanity that his grace includes everyone. Furthermore, even a non-muslim who works with dedication receives God's grace, as the act of work is one of the universal laws which had been dictated by the Almighty.

From a critical perspective, the curriculum analyses the Muslim's code through his daily practices in a way that strengthens the effectiveness of the concept of Takaful's and its influence regarding the students receiving these thoughts. Therefore, it would be valid to deduct the concept of Takaful is linked with the moral duties in Islam which would help in achieving the goal of social cohesion and socio-economic development.

Therefore, strengthening the curriculum's vision requires the citation of more religious verses to ensure the implementation of the thought of Takaful. As Hamad, Salah, Mohamed, and Mansour (2022, p. 29) clarified, if a Muslim did not fulfill his duty towards work, this would cause a social and spiritual disturbance as the society won't be productive and the Muslim's devotion to his God won't be valid. Accordingly, this would lead to moral decay in accordance with Islamic logic.

The curriculum mentions the 55th verse of Surat Al Nour: Allah has promised those of you who believe and do good that He will certainly make them successors in the land, as He did with those before them; and will surely establish for them their faith which He has chosen for them; and will indeed change their fear into security—'provided that' they worship Me, associating nothing with Me. But whoever disbelieves after this 'promise', it is they who will be the rebellious.

Thus, it is critical for a Muslim to be devoted to his work in order to receive God's grace. So, a devout Islamic society is the key for a cooperative and a developing society which works on the benefit and welfare of all citizens even the non-Muslims.

This logical interpretation shows the importance of work as an efficient tool which accelerates the social inclusiveness of non-Muslims in the society and helping to develop a socio-economic base for cohesion and development.

To affirm the validity of this logical interpretation, it would be rational to associate the concept of Takaful in general and work in specific to the Islamic interpretation regarding the purpose of Humankind on earth. So, the 30th verse in Surat Al Bakara was mentioned: 'Remember' when your Lord said to the angels, "I am going to place a successive 'human' authority on earth." They asked 'Allah', "Will You place in it someone who will spread corruption there and shed blood while we glorify Your praises and proclaim Your holiness?" Allah responded, "I know what you do not know."

Accordingly, this means that a human carries God's grace, and to attain this grace would be through the act of compassion, well treatment to one's fellows during his lively events as work. So, a devout Muslim should work with compassion while being kind and cooperative with his fellows even if they are not following the same creed.

Regarding the mentioned interpretations, the curriculum uses a pragmatic approach to analyze religious fundamentals by linking them to the socio-economic issues which were analyzed and identified by the Egyptian government. This leads to the implementation of a strategy which uses religious education in school as a tool to achieve social cohesion.

Furthermore, the curriculum mentions that the purpose of human beings and Muslims in specific on earth is to develop it and to do that so that other societies, communities could thrive on earth with peace. (Hamad, Salah, Mohamed, and Mansour, 2022, p.70)

In addition, the purpose of human beings goes beyond the development of earth as the curriculum mentions. So, this shows the formulation of a new narrative which helps in reconciling the traditional or fundamental ideals of Islamic religions and the social needs of the modern Islamic nation-state.

Accordingly, the curriculum mentions that a Muslim should be responsible in front

of God to develop the earth and accordingly his society. (Hamad, Salah, Mohamed, and Mansour, 2022, p.72)

So, the 165th verse of Surat Al Anaam was mentioned to prove the previous argument: He is the One Who has placed you as successors on earth and elevated some of you in rank over others, so He may test you with what He has given you. Surely your Lord is swift in punishment, but He is certainly All-Forgiving, Most Merciful.

In other words, the curriculum implements a very bold strategy in order to prove the authenticity of its content. As it was demonstrated, the curriculum uses a set of arguments which reflects the visions of the ministry of education, and religious institutions as Al Azhar. Moreover, religious ideals, morals and values were preserved while being linked to state goals such as social cohesion and economic integrity within society.

Accordingly, the mentioned arguments are supported by Quranic verses to legitimize its validity and impact on the Islamic society in Egypt. Therefore, through this pedagogical structure it would be easy to implement ideas to reconstruct socio-political concepts shaped within the Egyptian society. Also, it would be efficient to use the Islamic education's curriculum as one of the tools to influence social mobilization to support state-led policies and strategies.

The Islamic values and their effect on social development:

According to the previous analysis, the contemporary religious studies curriculum in Egypt worked on implementing new idioms and values which associates the Islamic fundamentals, and basics along with Governmental goals of social cohesion and socio-economic development.

In more details, the curriculum also advocates some ideals which reflects nationalist gains as working for the development of the Egyptian nation and relying on ideals which preserves its culture and past legacy.

This was demonstrated by using the 9th and 10th of the verses of Surat al Gom'aa: O believers! When the call to prayer is made on Friday, then proceed 'diligently' to

the remembrance of Allah and leave off 'your' business. That is best for you, if only you knew. Once the prayer is over, disperse throughout the land and seek the bounty of Allah. And remember Allah often so you may be successful.

Thus, the Muslims main duty is to pray with his fellows and to work afterwards which offers the chance for the Islamic community to be devoted to God's grace and their own well-being through work. (Hamad, Salah, Mohamed, and Mansour, 2022, p.75)

Furthermore, the mentioned conception would offer more validation to the theme of Takaful. As Hamad, Salah, Mohamed, and Mansour (2022, p.75) mentioned, a devout muslim is a person who fulfills his religious obligations as prayer and working in order to ensure the well-being of his society "even if non-muslims are included", and work on defending and preserving both his religion, work, and society.

So, the authors relied on the prophetic verdicts to improve their viewpoints, which influenced them to cite the prophets Hadith regarding the defense religion, work, and society. Sa'īd ibn Zayd reported that the Messenger of Allah (may Allah's peace and blessings be upon him) said: "Whoever is killed in defense of his wealth is a martyr. Whoever is killed in defense of his family, himself, or his religion is a martyr. (Sahih Al Tirmidhi)

The mentioned ideas, verses, and prophetic verdicts would be used through an efficient structure to reflect a new vision regarding national development. Moreover, it would be valid to deduct that both the Egyptian leadership and Al-Azhar are aiming to preserve the Islamic principles while using them to strengthen the economic, and social structures of the state.

Accordingly, the concept of Takaful was used as an idiom which helped in reconciling the ideals and visions of the Government and Al-Azhar. So, Takaful would influence the Egyptian Islamic youth to concentrate of working for the development of the Egyptian society and the well-being of the society without regard to any religious or ethnic differences. In addition, Takaful would help the Muslim citizen to be devoted to God and receive his grace through work and

cooperation with the society's members.

This would prove this thesis view regarding the curriculum, as idioms as Takaful could be used to demonstrate the validity of the curriculum as a tool for political, social, and economic change.

To sum up, the religious studies curriculum is used to influence the Muslim youth which represent a majority of the Egyptian society. Thus, the curriculum relies on idioms that are based according to two institutions. First, the ministry of education which reflects the vision of the Egyptian government. Secondly, Al Azhar which is an independent institution which works on the preservation of the Islamic fundamentals.

Continuously, the idioms used reflect two perspectives of Al Azhar and the Egyptian government. So, Idioms as Takaful are used for the purpose of narrowing a moral framework for the Islamic youth to concentrate on prayer and work. For the government, idioms are used for social mobilization to support state policies and vision.

Meaning, idioms as takaful are used for social purposes rather than being just directed to religious studies. Moreover, the mentioned concept aims for Muslims to empower social cohesion and economic development through religious fundamentals and ideals.

The effect of ideals as “takaful” in reframing the traditional pedagogic narratives:

By analyzing the current curriculum, it would be valid to conclude that the new idioms implemented would assist in reframing the traditional religious discourse or pedagogical narrative implemented through the books. In his conclusion, Gregory Starrett (1998, p.5) highlighted the religious studies curriculum in the Islamic countries within the middle East “focusing on Egypt” reflects a master narrative which helps in influencing the societal norms and values.

Accordingly, the master narrative usually focuses on portraying Jews as hostile against Muslims and Arabs. Also, it focuses on portraying the Islamic society as a

community under threat from other societies. On the other hand, the new idioms implemented offer a new interpretation to the traditional narrative used to formulate the curriculum.

Therefore, the Egyptian government attempts to reflect a new perception through the curriculum which would assist in formulating a new narrative which opposes the classical view regarding Islamic studies.

The mentioned proposition could be traced through the third preparatory book of religious studies. Ideals as *takaful* serve as a catalyst to evolve the purpose of the ideological narrative of the educational curriculum.

Moreover, new narratives were implemented in order to align the Islamic thought with more pacifist and peaceful narratives. As Hussein, Hagagy, Madah (2018, p.40) mentioned, a faithful Muslim should behave with responsibility and good will regarding his society, community, family, and homeland. Moreover, the authors supported their viewpoint by using the prophetic verdict which says: All of you are shepherds and every one of you is responsible for his herd.

So, the curriculum relies on a reframed narrative which portrays Islamic religion as a way of living which organizes the social, cultural affairs of the Muslim citizen. This could be seen more through the idiom of *Takaful*.

Accordingly, the Curriculum mentions that a faithful Muslim should be always caring and weary about the wellness of his society. As society's members are the key concept for social cooperation which would lead to socio-economic development.

Therefore, a Muslim should seek two goals to reach spiritual enlightenment and a satisfying life. First, working with responsibility is an essential tool to attain individual and social dignity. This could be fulfilled by focusing on one's work either if it was governmental, private, individual, collaborative, and with no regards to the field of specification.

Secondly, an honorable Muslim citizen should care for the social welfare as it is his own responsibility. So, this should be done through collaboration with his fellow citizens to help in preserving a healthy society.

As investigated, the mentioned ideals as dedication, collaboration would influence Muslims to create a cohesive society which aims at increasing its welfare with no exclusion or discrimination towards any member within the society. (Hussieni, Hagagy, Madah, 2018, p.41)

So, the ideas voiced through the curriculum were also supported by the 71st verse of Surat Al Tawba: The believers, both men and women, are guardians of one another. They encourage good and forbid evil, establish prayer, and pay alms-tax, and obey Allah and His Messenger. It is they who will be shown Allah's mercy. Surely Allah is Almighty, All-Wise.

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This claim could be supported by the Prophetic verdict which states: A faithful

believer to a faithful believer is like the bricks of a wall, enforcing each other. This would show the importance of social collaboration as a critical state which would swiften the implementation of reformation policies and political strategies.

Accordingly, Hussieni, Hagagy, and Madah (2018, p.42) pointed that if a muslim behaved in accordance with what have been mentioned regarding work and social collaboration, it will be easy to implement policies which limit social corruption.

Furthermore, a strong and capable state reaches its zenith through a well-organized society. Therefore, if the individual and society are focusing on work and collaboration, it would be easy to evade and limit social corruption or avoiding Fitna “temptation or disorder”.

The mentioned logical interpretation was supported through the curriculum by using the 25th verse of Surat Al Anfal: Beware of a trial that will not only affect the wrongdoers among you. And know that Allah is severe in punishment.

In other words, the Curriculum uses new interpretations which links Islamic teachings with social organization and the ability for the state to implement a well-functioning policy which helps in achieving its visions and satisfy its needs.

So, this helps in envisioning a new narrative which envisions the teachings in the curriculum as a tool for the Muslim individual to understand its moral duties regarding his religion and his role as an efficient citizen within the society.

Through additional analysis, the new narrative could be easily grasped through the association between Islamic thought and economic development. So, the curriculum mentions that there is a symbiotic relation between social cohesion and economic development. However, this relation could be maintained by adhering to Islamic principles and fundamentals.

From a pedagogic perspective, economic development could be attained by understanding, and implementing the Islamic principles which would help in achieving social justice and equity between the citizens of the state. As Hussein, Hagag and Madah (2018, p.43) highlighted, Islamic thought helped in achieving a good economic status through fraternity, compassion, and mercy.

So, the authors’ interpretation was supported by the verdict which says: The

believers, in their mutual love, compassion, and sympathy are like a single body; if one of its organs suffers, the whole body will respond to it with sleeplessness and fever.

In adherence with the previous verdict, the curriculum proposes that there are two main requirements. First, through fraternity a Muslim individual should be held responsible to preserve his community and vice versa. So, with this sense of fraternity, a rich citizen will make sure to support and take care of his fellows which have limited financial capabilities. Therefore, the aim of fraternity is to connect between financially capable Muslim citizens and his financially incapable fellows. Secondly, through the Zakat “philanthropy” comes a valid chance for economic evolution. Furthermore, this act would ensure would preserve the economic integrity of Muslim individuals. Moreover, it would help in offering welfare to the incapable citizens without regard to their gender, ethnicity, or religious beliefs.

These two principles would reflect the validity and importance of Takaful as tool to link between social cohesion, economic development and the Islamic morals and values. In order to prove this statement, the 7th surah of al Hashr was cited through the curriculum as it states: As for gains granted by Allah to His Messenger from the people of ‘other’ lands, they are for Allah and the Messenger, his close relatives, orphans, the poor, and ‘needy’ travellers so that wealth may not merely circulate among your rich. Whatever the Messenger gives you, take it. And whatever he forbids you from, leave it. And fear Allah. Surely Allah is severe in punishment.

Accordingly, with the implementation of the concept of Takaful, the authors suggest that by following the Islamic teachings and fulfilling the Vision of cohesive society, it would be easy to initiate a developmental strategy regarding the economy. So, the mentioned suggestion could be implemented in six steps. (Husseini, Hagag and Madah, 2018, p.45)

First, if a Muslim citizen reached the legal age, it would be possible for him/her to manage its own fortune as long as it follows the Islamic moral code. That would offer the Muslim citizen economic integrity and his/her independence of choice.

Second, allowing the Muslim to acquire its own private property. So, the only

restriction that this property should be attained without corruption, and that the Muslim citizen should fulfill his duty by collaborating with his fellows in the society “non-Muslims included” and those who are financially incapable through Zakat. Therefore, if these requirements were not trespassed, then the citizen have the right to acquire private property and receive protection from the government.

Third, with the citizen’s fulfillment of his religious duties and while working with precision. It would be easy to reach an Islamic ideal society, this could be achieved by social collaboration that helps in benefiting the common good of the society and receiving God’s grace in the afterlife.

Fourth, through the conception of Zakat and the avoidance of corruption, the State would be allowed to collaborate with individuals to advocate local investments which benefit both the state and society.

Fifth, acts of corruption as cheating, lying, gambling, exploitation, and monopoly should not be tolerated to ensure the success of economic development in accordance with the Islamic principles. This stance would be supported by the Prophetic which says: Whoever deceives us is not of us.

Sixth, Islamic principles forbids usuring or moneylending as it serves as an exploitative agent against incapable citizens which goes against the principles of Islam and social cohesion altogether.

In light of the six mentioned steps, Hussein, Hagag and Madah (2018, p.46) propose that by fulfilling the purpose of Zakat which represents the essence of Islamic basics and Takaful provides the solution to socio-economic issues it would be easy to develop the Egyptian society.

Accordingly, the mentioned statement could be fulfilled by investing in infrastructure such as schools, hospitals, water supplies, prayer sites and humanitarian organizations to assist incapable citizens.

As investigated, the Islamic interpretation to economic development helps in formulating a new narrative which assists in social cohesion, economic integrity, and nation-building. That could be seen as the curriculum mentioned that even all citizens should benefit from socio-economic welfare.

Thus, this narrative would offer a new interpretation which assists in learning, improvising, and accepting other civilizations and cultures. So, this proposition would assist in reframing the collective conscience of the Egyptian society and the religious discourse embedded in the governmental curriculum.

To conclude, the religious studies curriculum serves as a critical tool which links the usage of Islamic fundamentals to seek spiritual enlightenment while offering a solution to the socio-economic issues which affects the policy-making process of the Egyptian state.

As new idioms were implemented or reinterpreted, the curriculum implements a new narrative which advocates the implementation of religious-social concepts as Takaful and Zakat to provide valid solution to the issues envisioned by the Egyptian state and Al-Azhar.

So, the concept of Takaful would offer a logical pattern which advocate social cohesion, economic integrity, and social inclusiveness for all Egyptian citizens. Also, the reinterpretation of Zakat would assist in fulfilling social justice, equity in opportunities.

Then, both concepts require the Muslim citizen to work with efficiency and in accordance with the Islamic principles mentioned through the Islamic Holy book and its prophetic verdicts.

So, the curriculum introduces a new narrative which portrays faithful Muslims as efficient citizens who are aiming for their individual and social well-being. Accordingly, this would lead to political stability and economic evolution.

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The Failure of Al-Nahda in Post-Arab Spring Tunisia: The Struggle between Mundane Party Politics and Islamist Ideals

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Abstract:

After decades of being marginalized and brutally repressed under Ben Ali's rule, Tunisian Islamists—affiliated with al-Nahda movement—managed to secure significant electoral victories following the Tunisian revolution in 2011. Yet, despite the electoral victories that al-Nahda secured after the uprising, and its initial political success, it witnessed electoral and reputational losses. The recent failings of al-Nahda—in tandem with the political failings of mainstream Islamist groups post Arab uprisings—has stimulated lots of discussions. While some argued that the political failings experienced by Islamists demonstrate the unviability of Islamism, and the impracticality of Islamist ideals, others explained the failings of Islamists with reference to mundane party politics, rejecting the particularity of Islamist parties. In light of this, this paper—with special focus on struggles at the level of al-Nahda's leadership—aim to analyse the failings of al-Nahda in Tunisia during the post-Arab uprisings period. It Asks “How did leadership struggles impact the trajectory of al-Nahda in post-revolutionary Tunisia?”.

The paper argues the al-Nahda's political failure does not necessarily assert the unviability of Islamism as an ideology, and that the party's failure can best be explained by referring to struggles, accusations, and fragmentation at the level of the party's leadership. Accordingly, this paper is divided into three main sections. The first section reviews the literature on the failure of Islamism, reviewing works such as Olivier Roy's Failure of Political Islam and some of its critics. The second section sheds light on al-Nahda's trajectory in post-revolutionary Tunisia and highlights its recent political failings. The third section then examines several weaknesses and problems

at the level of the al-Nahda's leadership such as the party's leaders' accusations of corruption, fragmentation and ideational struggles. The paper concludes by highlighting that the failure of al-Nahda is—arguably—best understood by referring to the weaknesses of the party's leadership, which does not necessarily reveal the failure of Islamism or the unviability of Islamist's ideology.

Introduction

After decades of being marginalized and brutally repressed under Ben Ali's rule, Tunisian Islamists—affiliated with al-Nahda movement—managed to secure significant electoral victories following the Tunisian revolution in 2011. Yet, despite the electoral victories that al-Nahda secured after the uprising, and its initial political success, it witnessed electoral and reputational losses. The recent failings of al-Nahda—in tandem with the political failings of mainstream Islamist groups post Arab uprisings—has stimulated lots of discussions. While some argued that the political failings experienced by Islamists demonstrate the unviability of Islamism, and the impracticality of Islamist ideals, others explained the failings of Islamists with reference to mundane party politics, rejecting the particularity of Islamist parties. In light of this, this paper—with special focus on struggles at the level of al-Nahda's leadership—aim to analyse the failings of al-Nahda in Tunisia during the post-Arab uprisings period. It asks “How did leadership struggles impact the trajectory of al-Nahda in post-revolutionary Tunisia?”. The paper argues the al-Nahda's political failure does not necessarily assert the unviability of Islamism as an ideology, and that the party's failure can best be explained by referring to struggles, accusations, and fragmentation at the level of the party's leadership which provides a wider scope of analysis. Accordingly, this paper is divided into three main sections. The first section reviews the literature on the failure of Islamism, reviewing works such as Olivier Roy's *Failure of Political Islam* and some of its critics, as well as different scholarly approaches in understanding the failure

of Islamists. The second section sheds light on al-Nahda's trajectory in post-revolutionary Tunisia highlighting its recent political failings. The third section then examines several weaknesses at the level of the al-Nahda's leadership such as the party's fragmentation and ideational struggles, the problem of internal democracy, ending with some of the external constraints that shaped the behavior of party's leaders. The paper concludes that Al-Nahda-under Ghannouchi's leadership-had pursued actions and undertook several measures that weakened the party's organizational structure and also affected al-Nahda's overall legitimacy, highlighting that the failure of al-Nahda is—arguably—best understood by referring to the weaknesses of the party's leadership, which does not necessarily reveal the failure of Islamism or the unviability of Islamist's ideology.

The Failure of Islamists: Literature Review

When reviewing the literature on the failure of Islamist groups, three different-yet interrelated-scholarly trends can be identified. The first scholarly trend largely interpreted the failure of Islamist groups by referring to the unviability of their Islamist ideology. The second scholarly trend, on the other hand, rejects blaming Islamism for the failure of Islamists, and argues that the political failure of Islamists resembles the failures of political parties elsewhere. Hence, rejecting treating Islamists with particularity. The third trend-in tandem with the failures of Islamists after 2011-followed the second strand yet argued for the need to give attention to new contextual factors when understanding transformations in Islamists' political trajectory.

Starting with the first scholarly trend, Olivier Roy in 1992 published *The Failure of Political Islam* where he argued that Islamists failed not in achieving power but rather their failure is understood as the loss of Islamism's original impetus (Roy, 1992, p.ix). To Roy Islamism "no longer offers a model for a different society or a brighter future" (p.ix). Roy explained this failure as taking place on two main levels: intellectually, the Islamic thought suffers intellectual paradox. From one hand, the existence of Islamic society is necessary for Muslims to achieve virtue, yet, this Islamic society needs the virtue of its members and leaders to function properly

(Roy, 1992, p.x). Islamism also failed historically, as history reveals that Islamists failed to invent new society. Roy stated “Neither in Iran nor in liberated Afghanistan has a new society been established. The failure of Islamism does not mean that parties such as the Algerian FIS (Islamic salvation front) will not achieve power, but only that those parties will not invent a new society” (p.x). Given the unviability of Islamism as an Ideology, Roy argued that Islamists either resort to normalisation by converting themselves into normal political parties, or evolve towards neo-fundamentalism⁵⁴ (Roy, 2004, p.1). To Roy, this failure entails the prevalence of politics over religion, as is the case in Iran. “The utopian Islamic state has faded away in favour either of practical politics or of another Utopia, the Ummah” (Roy, 2004, p.40). Roy, additionally, came to confirm his thesis in his writings after 2011. In the *Failure of Political Islam Revisited*, Roy (2020) stated “*the chapter argues that Islamists are not to failure given their success in mobilizing support from the population and winning elections. However, it underlines that Islamists are likely to drop their Islamists objectives in favor of fostering democratic values. The failure of political Islam as such has also resulted in the rise of neo-fundamentalism reflected in Wahhabi-Salafism*” (p.167). Roy highlighted the Islamists dilution of their original ideologies, as well as the rise of neo-fundamentalists-Known as Salafists-prove the failure of Political Islam thesis that he developed in 1992.

Roy was not the only thinker to talk about the failure of Islamists reflected in the unviability of their Islamist project, Asef Bayat-the Iranian American scholar- in his articulation of the concept of ‘post-Islamism’ has argued that Islamists--as a result of facing several constraints--tend to abandon their totalising discourses, and start developing more democratic version of Islamism (Bayat, 2007, p.16). To Bayat, “Post-Islamism represents both a condition and a project”. It is a political and social condition in the sense that after a period of experimentation, Islamism’ appeal, energy and sources of legitimacy get exhausted. Out of awareness of their system’s shortcomings, Islamists “attempt to normalize and institutionalize their rule” (Bayat, 2007, p.18). Bayat added that post-Islamism is also a project in the

⁵⁴ Roy elaborated on neo-fundamentalism by stating “a closed, scriptualist, and conservative view of Islam that rejects the national and statist dimension in favor of the ummah, the universal community of all members, based on sharia” (p.1).

sense that it is an intended and conscious attempt to “conceptualize and strategize the rationale and modalities of transcending Islamism in social, Political and intellectual domains” (p.19). Several studies have utilised Bayat’s Post-Islamism concept in tracing the changes --towards more ideological moderation-- of Islamist movements. For instance, Cavatorta and Merone (2015) draws on the case of al-Nahda in Tunisia highlighting the internal ideological debates inside the party during the period of transition (p.28). Cavatorta and Merone shade light on the significance of the notion of post-Islamism as a helpful tool “to explain the continual relevance of thinking about Islamist politics through ideology” (p.27).⁵⁵

In his book *The Trial of Political Islam*, Gilles Kepel (2003) highlighted that in the second half of the century, thanks to many moderate figures, Islamists began to realize that their ideology was leading to a dead end.⁵⁶ (p.367-368). Part of Kepel’s work stressed on the moderation of militant Islamist movements, arguing that many of them have sidelined the radical ideas of Qutb, Mawdudi, and Khomeini, celebrating the democratic essence of Islam, and rejecting the Jihadist Salafists factions of Afghanistan (Kepel, 2003, p.368). Garcia (2012) stated “Kepel concludes that «in the spring of 1997» there was evidence that Islamists were looking forward to leaving behind the political impasse in which they found themselves following the failure of Islamist ide-ology and the alliance of the bourgeois middle class and disinherited youth” (Kepel 2000a:17, as cited in Garcia, 2012, p.453).

In the chapter titled *Problem of the Political in Islamist Movements*, Roel Meijer (2016) referred to the crisis of Islamists by stating “*Islamists claim to be all things at once while not having the political instruments (which they had never developed) to deliver. Whereas in theory Islamism promises a perfect society and is able to mobilize people on the basis of its slogan ‘Islam is the solution’ (al-Islam huwa al-Hall), in practice it suffers from the weakness of populism and its simple solutions*

⁵⁵ Cavatorta and Merone (2015) argued that al-Nahda’a moderation and strategic behaviour should not be understood as a failure of Islamism as highlighted by Roy, but rather it reflects the changing and adaptive nature of Ideologies.

⁵⁶ Kepel cited figures such as effendi, Muslim brothers that created al-wasat party in Egypt I 1995, as well as moderate leadership of the Turkish Refah Party (Kepel, 2003,p.367-368)

to complex problems, which are believed to be located in the personality of the ruler, the morality of the believers, and adherence to god's rule" (p.28). Citing Roy's failure of political Islam thesis, Meijer stated that Islamism's main problem is the concentration on utopian goals, while ignoring factual results (Meijer, 2016, p.28). This wide scholarly trend that understood Islamist behaviour in a mere ideological sense has been subject to fierce criticisms. For instance, in his work *Post-Islamism and the Religious Discourse of 'Abd al-Salam Yasin* Henri Lauziere (2005) while focusing on the Moroccan context argued that post-Islamist theory-despite its trail to systemize data into coherent pattern-relies on a very selective understanding of Islamism that is not useful in understanding the Moroccan context. In *The failure of Political Islam: Ideological delusions and sociological realities*, Abdul-Ghani Imad (2018) argued that when documenting the history of Islamist groups in the Arab world, two methodological and analytical levels are required. Firstly, it requires studying Islamism with Dynamism and avoid static approached in understanding Islamist movements. Secondly, Imad highlighted the need to liberate the study of Islamist movements from the stereotyping that had led to the understanding of Islamism as a phenomenon separate from "the contexts of social, humanitarian, and political development" (p.69). Furthermore, the French scholar Alain Roussillon rejected the framework of post-Islamism, and worked on highlighting forms of orientalism embedded in it (as cited in Imad, 2018, p.35). According to Imad (2018) "*Roussillon believed that those who argue for Islamists failure (Gilles Kepel and Olivier Roy) are operating under the same distorted logic that in the past led them to attach excessive importance to analysing state of Arab-Islamic Politics in terms of Islamism, as Kepel and Roy believed that Islam dictates anything and everything that take place in Muslim societies*" (p.35). In his work *Understanding Political Islam* Francois Burgat (2020) offered a well-structured critique to Roy by stating "Roy's statement was not totally inaccurate. Yet, it struck me and others, as being more theoretical, or archetypal, than it was sociological or based on observations of dynamics in the field" (p. 200).

In *The Failure of Political Islam? The Muslim Brotherhood Experience in*

Government, Ardovini (2017) argue that the removal of the Muslim Brotherhood from power in Egypt is not equal to the failure of political Islam. Instead, this stresses the need to conduct case-specific understanding of the causes of the failure that recognizes the diversity and heterogeneity of the practices within the Islamist doctrine (p.4). Ardovini concluded the study by arguing for the need to understand the notion of failure beyond the ideological focus of Roy's thesis. He stated "something else that needs to be taken into consideration when advancing such claim is the context in which the 'failure' is perceived as temporal, national and societal factors could impact significantly on success' rates and indicators, regardless of ideological affiliations", arguing for the importance of understanding the heterogenous nature of political Islam (Ardovini, 2017).

On the other hand, different scholarly trend refrained from attributing the failure of Islamist groups to their ideology, widely rejecting treating Islamist groups with particularity. For instance, Rory McCarthy (2018) in his article *When Islamists Lose: The Politicization of Tunisia's Ennahda Movement* argued that the behaviour of Islamists can best be explained by drawing on the experiences of non-Islamist parties operating in times of transition. McCarthy stated "This article takes the view that the experience of non-Islamist parties in transitions elsewhere has much to offer in explaining the challenges and complications facing an Islamist group as it adapts to pluralist political competition" (p.367). McCarthy also cited Jillian Schwedler (1998) arguing that Islamists are like any other political parties. They might fail to meet the high expectations of the people especially at times of recent political openings, and might fell short in meeting their promises (Schwedler, 1998, as cited in McCarthy, 2018, p. 367). McCarthy (2018) added that Islamists might find that the ideological legitimacy they enjoyed when in opposition is weakened when facing new challenges, and when they encounter heated debates (p.367). Following the recent political failures of Islamists after gaining power in Egypt and Tunisia, recent studies emerged advocating the need for more contextual analysis in understanding the failure of Islamists and arguing that events after 2011 reveals the need to look at new factors in explaining and analyzing the failure of Islamist

groups. For instance, in their article *10 Years On: New Contextual Factors in the Study of Islamism*, Ardovini and Biagini (2021) highlighted that 10 years after the eruption of the Arab revolts, many changes have occurred in the field of Islamism which then necessitate the need to find new approaches in the study of Islamism (p.411).

Ardovini and Biagini (2021) highlighted that post-2011 scholarship on Islamism highlights the need to concentrate on different and diverse aspects of these movements' changes. Drawing on the case study of the Egyptian Muslim Brotherhood, they argued that three main factors need to be taken into consideration when understanding the trajectory of Islamist movements after 2011 "These are the dimension of exile; the increased role played by women and youth; and the emergence of cross-generational and cross-ideological alliances" (p.411).

In their book *Islamists and the Politics of the Arab Uprisings*, Hendrik Kraetzschmar and Paola Rivetti (2018) argued that the quick transformations in the field of political Islam following the Arab uprisings suggest the need for a new analysis and approach in the study of Islamist politics. They stated "*Far from downplaying the relevance for Islamists of religion as a moral compass informing policy choices, the volume highlights that the behaviour of Islamist organizations is very similar to that of political parties and socio-political organizations more broadly in contexts of change, be they liberalisation, authoritarian resurgence or regime change*". The authors further argued that the uprisings had different impacts on different Islamist groups that is why they reject one-size fits all approach in understanding Islamists' behaviour, they are more in favor of context-specific analysis, with some reflections on the trajectories of non-Islamist parties elsewhere. Also, this to be done without undermining the significance of Islamists' own ideology.

For instance, in his work *Understanding the Transformation of Political Islam beyond Party Politics: The Case of Tunisia*, Ester Sigillo (2022) in understanding the transformations within al-Nahda in Tunisia shifted the attention away from focusing on political party as the unit of analysis to focus on civil society actors and

extra-party engagement (p.2).

Research question:

Drawing on the case study of the failure of al-Nahda in post-revolutionary Tunisia, and aiming to provide a plausible explanation to its failure after a period of early success, the paper-in bridging the gap between the diverse strands in the literature-selected to analyze the failings of al-Nahda by referring to struggles at the level of the party's leadership. It asks "How did leadership struggles impact the trajectory of al-Nahda in post-revolutionary Tunisia?". The selection to focus on leadership as the level of analysis requires looking at the impact of ideology (1st strand), acknowledging the resemblance between Islamist parties and the trajectories of non-Islamist groups elsewhere (2nd strand), as well as an exploration of the political and economic contexts (3rd strand). Hence, focusing on leadership as the level of analysis combines the reasoning of each of the previous strands of the literature.

The Failure of Al-Nahda in Post-revolutionary Tunisia: Case-Study

1-Historical Background and The Party's Political Trajectory:

Following Tunisia's Independence in 1956, President Bourguiba was preoccupied by the aim to modernize the country. His reign was full of reforms aims at modernizing Tunisia along the western path, as well as limiting the traditional expression of Islam (Wolf, 2017, p.27). Hermassi (1984) stated that Bourguiba had launched a phycological revolution, directing Tunisia towards modernist reforms which involved rapid restructuring of Islam as part of fighting underdevelopment (as cited in Boulby, 1988, p.591). The Tunisian state under Bourguiba-while acting as a cultural initiator and engineer-aimed at reducing "the universalist dimensions of Islam horizontally and vertically" (Mabrouk, 2015, p.50 as cited in Loudon, 2015, p.6).

Bourguiba initiated a set of educational, legal, and land reforms that contributed to the dismantlement of the traditional religious establishment. Bourguiba's education reforms have two main aims "the unification of the education system,

and the enrolment of all children in primary school within the decade” (Boulby, 1988, p.591). The effect of these reforms on the traditional religious Ulema was huge. The unification of the education system entailed abolishing all religious schools and banning religious education (Boulby, 1988, 592). Additionally, these reforms entailed the dismantlement of Zaytouna University-the centre of religious education in the country. According to Boulby (1988) “the Zaytouna Mosque was integrated into the new universite de Tunis with a western-style curriculum” (p.593). The reforms initiated by Bourguiba and acted as the defining features of his reign had allowed him to maintain a strong grip on the public sphere of religion (Louden, 2015, p.6). As stated by Sarah Louden (2015) “overall these reforms symbolized a vital turning point in the devastation of traditional Islam in the state” (p.6).

As a reaction to the increasing marginalized role of Islam in society, a group of young Muslims founded the Islamic group (*al-Jamaa al-Islamiyya*) with the aim of defending the country’s Islamic identity. Under the leadership of Rachid Ghannouchi, Abdelfattah Mourou, and Hmida Ennaifer, the movement was a dawa’ movement that practice and teach Islam in its pure form (Meddeb, 2019, p.3).

During its early rise, the movement was tolerated by the regime of Habib Bourguiba (1956-1987) (McCarthy, 2018, p.371). However, when Ghannouchi and other leading figures within the movement declared their ambition to compete in 1981 elections as the Islamic tendency movements (MTI) *Harakat al-Ittijah al-Islamiyya*⁵⁷, Bourguiba started an oppressive campaign against the newly organized movement, conducting several waves of arrests in 1981, 1983, and 1987 separated by short periods of relief and informal negotiations (McCarthy, 2018, p.371-372). Bourguiba’s change of strategy in dealing with Islamists from tolerance to oppression came as a response to the increasing influence of the movement members, as highlighted by Souhayr Belhassen (1981) it was expected that the MTI was operating in around 300-350 mosques throughout Tunisia (as cited in McCarthy, 2018, p.371). McCarthy (2018) highlighted that the MTI grew with a solid organizational structure and was able to expand its influence from the leadership

⁵⁷ “in 1979, the Islamic group changed its name to the movement de la Tendance Islamique (MTI). This marked the birth of the 1st Tunisian Political Islamist movement that encouraged both preaching and political activism” (p.4).

based in the city of Tunis down to small districts and small study groups in private homes (p.372).

The movement's members suffered from harsh repressive measures while in jail, and Ghannouchi and other leaders were sentenced to long years in jail. This situation explains why the movement cheerfully welcomed the 1987 coup conducted by Ben Ali, especially given his promises of a considerable political opening (Jean-Philippe bras, 1985, as cited in McCarthy, 2018, p.372). To comply with a new law issued under Ben Ali's rule that prohibits parties based on race, religion, language or region, the MTI had changed its name to al-Nahda (the renaissance) (Shahin, 1997, as cited in McCarthy, 2018, p.372). Al-Nahda was not formally authorized and its members were only allowed to run as independent candidates in 1989 elections. Yet, despite being the strongest opposition group in these elections, al-Nahda was denied entry to the parliament (La Presse, 1989, as cited in McCarthy, 2018, p.372). Ann wolf (2017) explained that in 1981, the movement was seeking authorization within the system to escape the crackdown of Bourguiba's regime (a survival strategy). Yet, by mid-1980's, the pragmatic wing within the movement showed interest for political participation in multi-party politics (p.69).

Al-Nahda was subject again to fierce repression under Ben Ali-regime, as highlighted By McCarthy "thousands of al-Nahda members were jailed and socially excluded by being sacked from public sector jobs and forced to register several times a day at police and national guard offices" (p.372). Also hundred other members went to exile including Ghannouchi-the movement leader (p.372). According to Ann wolf (2017) Ben Ali' regime worked hard on making al-Nahda's experience in prison as repressive as possible, considering that such measures would curtail their influence and prevent them from challenging the regime (p.80). Many human rights abuses and different forms of torture were recorded during Ben Ali's era. Such measures were the main tool to break the Islamists (Wolf, 2017, p.80).

Decades of repression and economic backwardness had increased the popular

dissatisfaction with Ben Ali's regime. As a result, protests spanned all over the country starting December 2010, after Tarek Bouazizi- a Tunisian street vendor had set himself on fire after being humiliated by officials (Wolf, 2017, p.129). On 14 January 2011, Ben Ali fled the country, and Beji Caid Essebsi was appointed as interim prime minister (Wolf, 2017, p.129). Subsequently, all political prisoners were freed, and two weeks later Ghannouchi as well as other al-Nahda leaders arrived the country (Wolf, 2017, p.192, p.131).

Al-Nahda finally had the chance to participate in elections in October 2011. Showing strong electoral performance, the party was able to secure 34.8% of the vote. Accordingly securing 89 seats (McCarthy, 2018, p.374). Al-Nahda was preceded by the congress of the republic party (CPR) and Ettakatol. Not being able to gain absolute majority, al-Nahda entered into a coalition with the other two secular parties (Wolf, 2017, p.134).

Al-Nahda faced several challenges once in power, to the extent that by 2014 elections, the party's historical and organizational advantages had faded away (McCarthy, 2018, p.374). According to McCarthy (2018) "the party had faced wide spread criticism for delays in drafting the new constitution and for failing to fulfill the expectations of rapid socio-economic change" (p.374). The challenges intensified and the political crisis reached its peak when in February 2013, Chokri Belaid, a secular opposition leader was assassinated by Salafists. Additionally, in July of the same year, Mohamed Brahmi, another secular politician, was also assassinated. As a consequence, al-Nahda was accused of "a lax approach to security" (McCarthy, 2018, p.374). following the assassinations of two secular politicians, the country witnessed massive protests that showed the grievances of the citizens with much anger directed at al-Nahda out of the belief that the party showed very weak response to such violent incident (Louden, 2015, p.14). With the assassination of Brahmi, more protests erupted demanding the resignation of the government (Louden, 2015, p.14).

Following these events, al-Nahda left office in January 2014 after a negotiated departure and after the new constitution was finally approved by the constitution

assembly (Wolf, 2017, as cited in McCarthy, 2018, p.374). In October 2014 elections, al-Nahda only won 26.5% of the vote, while the rival secular party Nidaa Tounes won 35.8% of the vote (McCarthy, 2018, p.375).⁵⁸ A Poll conducted by Pew research center (2014) showed that “only 31% of Tunisia has a ‘very favorable’ or ‘some what favorable’ opinion of Ennahda, down from 65% in 2012” (as cited in McCarthy, 2018, p.375).

Al-Nahda, However, came to prevail again in 2019 parliamentary elections, gaining with majority, yet still less significant comparable to the victories it secured in 2011 elections. As stated by Wolf (2021) in 2019 elections, al-Nahda won around a million fewer votes comparable to 2011 elections. Wolf added “Moreover, in a humiliating showing during the 2019 presidential elections, Ennahda’s candidate Abdelfattah Mourou placed third, with just 12.9 percent of the vote; an independent figure, Kaïs Saïed, beat the second-place finisher, secular candidate Nabil Karoui, in the run-off” (Wolf, 2021, p.15).

Kais Saied era had drastic implications on the Tunisian political landscape generally, and al-Nahda’s political trajectory specifically. Unrest erupted in 2021, when Saied decided to suspend the parliament, and dismissed the prime minister from office. Due to the massive resistance of al-Nahda -under the leadership of Ghannouchi (then speaker of the parliament)- to such steps, Saied had embarked on a massive political crackdown against political opponents particularly al-Nahda members who described these steps as a ‘coup’ (Sharp, 2023). Events intensified till in April 17 2023, Rached Ghannouchi was arrested by the Tunisian authorities and currently detained, ending al-Nahda’s decade of active political participation.

2) The Question of al-Nahda’s Leadership: the Party’s Identity, Internal rift, and External Constrains:

Rached Ghannouchi, being the co-founder of the Tunisian Islamist movement and the longtime president of al-Nahda’s party has been regarded as the most

⁵⁸ It is necessarily here to highlight that al-nahda lost popularity which is apparent in the decrease of its electoral votes. However McCarthy stated “the result revealed a growing disenchantment with the political elite. Not only did al-Nahda lose more than 500,000 votes from 2011, but voter turnout overall dropped by more than 70,000 (from 51% to 45%). (p.375).

influential figure within the Tunisian political scene (Wolf, 2021, p.2). Since 2011, Ghannouchi has been credited for al-Nahda's success and for the party's valuable contribution to democracy during the transitional period (Wolf, 2021, p.2). Foreign Policy in 2011 has included Ghannouchi among the 'top 100 global thinkers' (as cited in Wolf, 2021, p.3). Wolf (2021) further added "In 2012, Ghannouchi received the prestigious Chatham House Prize (jointly with then-president Moncef Marzouki) in recognition of his efforts at "bridgebuilding across the political spectrum" and his "contribution to promoting the idea of compatibility between Islam and democracy and modernity," which, the prize-givers stressed, "led people across the world to view Tunisia as a model in the region" (as cited in Doley, p.3). Once in power in 2011 it was widely expected that al-Nahda's leaders will willingly pursue their Islamist agendas. Yet, al-Nahda officials-surprisingly-embraced an approach based on compromise with various political actors, including secular forces and former regime members (Wolf, 2021, p.7-8). After the revolution, al-Nahda leaders joined other secular parties such as *Nidaa Tounes* in a coalition form of governance. To Wolf (2021) "Joining such coalitions has led Ennahda leaders often to err on the conservative side of post-revolution politics" (p.8). for instance, al-Nahda accepted a controversial legislation offered by Nidaa Tounes that suggests reconciliation and grant impunity to former regime figures as long as they can return the money they stole when in office (Wolf, 2021, p.8). This law was widely refuted by revolutionary activists (both Islamists and secularists) who preferred a stronger approach when dealing with corrupt former regime members (Wolf, 2021).

In their article *Post-Islamism, Ideological Evolution and 'la tunisianite' of the Tunisian Islamist Party al-Nahda*, Cavatorta and Merone (2015) highlighted the ideological moderation of the party after 2011, and argued that this does not reflect the ideological failure as Roy argued. Rather, it reflects party's natural ideological evolution. They argued for the party's shift towards post-Islamism by citing behaviors such as: working in coalitions with secular parties, accepting to leave power in 2014 in the name of national interest, accepting the notion of civil state

and the preservation of the Tunisian Identity “la Tunisianite” in the constitution, accepting to make no reference to sharia in the final draft of the constitution, as well as refraining from questioning the personal status quo (p.31-32).

Many al-Nahda members disapproved Ghannouchi’s new priorities, as well as their dissatisfaction with his policies of reconciliation with former regime figures-accused of corruption. Many opposed his attempt to distance the party from its main ideological base which is political Islam (Wolf, 2021, p.9). This resentment came in tandem with the party’s national congress in 2016 where Ghannouchi officially announced the party’s departure from political Islam instead becoming a party of “Muslim democrats” (Wolf, 2021, p.9). Ghannouchi (2016) stated “We would like to promote a new Ennahda, to renew our movement and to put it into the political sphere, outside any involvement with religion. Before the revolution we were hiding in mosques, trade unions, [and] charities, because real political activity was forbidden. But now we can be political actors openly” (as cited in Meddeb, 2019).

Under the previous authoritarian regimes, al-Nada was the custody of the marginalized Islamic identity. This has for long been the movements’ source of legitimacy. Based on interviews conducted with al-Nahda members, wolf (2021) stated “Today, under democracy, a growing number of Ennahda supporters affirm that they no longer know what the party stands for”. Critics from within al-Nahda argue that the party has become “personal project for Ghannouchi”, that lacked clear ideological vision (p.10). Rory McCarthy (2018) stated that following the party’s defeat in 2014 “the movement made a decisive, hard-to-reverse commitment to politicization, becoming a political party that would for the first time formally separate itself from religious, social, and cultural activism” (p.125). McCarthy added that many al-Nahda members believes that such moves undermine the movement’s legitimacy, dilute its ideology, and weakens its structure.

Wolf (2021) argued that Ghannouchi’s embrace of his decisions despite the existence of considerable internal party’s opposition reveal his strength, which is

drawn from multiple sources. For instance, Ghannouchi controls much of the party's financial realm and international relations, thanks to the long period he spent in exile. Additionally, among his powers is that he nominates all of the members of the party's executive bureau "a powerful body reporting to him that decides upon the party's annual priorities and the budget for specific initiatives". He is also in charge of determining any appointments or dismissals within the party. (p.10). "In July 2019, the Executive Bureau, acting at Ghannouchi's behest, decided to dismiss the heads of 30 of the party's 33 electoral lists, chosen by Ennahda's regional chapters, replacing them with candidates of their own choosing". As a result of that, Ghannouchi for the first time replaced the head of Tunis list and decided to run for parliament. After the victory of al-Nahda in the elections, Ghannouchi became the speaker of the parliament, which came in contrast with his declarations after 2011, that he will never run for public offices (Wolf, 2021, p.12). Many of the party members contended that the reshuffle of the electoral list, as well as Ghannouchi running for public offices act as violation to the Party' charter (Wolf, 2021, p.13).

Many resignations from the party have been documented in tandem with the talk about the increasing autocracy of Ghannouchi inside the party. Abdelfattah Mourou-cofounder of al-Nahda and its presidential candidate in 2019-left the party in 2020. He explained his withdrawal from the party by referring to the need to give space for "young leaders" and that "politicians should not stay forever" (Zayat, 2020, as cited in Wolf, 2021, p.13). This acted as direct criticism to Ghannouchi (Wolf, 2021, p.13). Splits have been recorded also among some of the loyalists to Ghannouchi. Even more, it has been recorded that grassroots and mid-level activists have distanced themselves from the party, either formally by announcing their departure or informally by retrenchment from party activism (Wolf, 2021, p.14). The most notable defection within the party came however when 100 members signed a letter calling for preventing Ghannouchi from running again as a party leader. The signatories argued for preventing Ghannouchi from another term as a party leader, as this would erode the credibility of the movement, "and

return Tunisia to a “presidency for life” situation, which is “associated with the pre-revolutionary regime.” (Wolf, 2021, p.18). Within the Tunisian public, Ghannouchi’s popularity is also waning. Results of a survey conducted in February 2021 revealed that 77% of the respondents has no confidence in Ghannouchi (Arabi, 2021, as cited in Wolf, 2021, p.16).

Samules (2003) stated that “Our common sense tells us that leaders and their decisions matter, but our social science theories tell us that constraints determine major societal outcomes” (p.33). in light of this, the internal party rift and leaders’ behavior cannot in fact be understood independently from the context with its external constraints. Among the external constraints that al-Nahda encountered once in power, is the harsh economic and political context that the party was operating in. As Wolf (2021) highlighted that it was expected for some internal dissatisfaction within the party to appear after a hard decade of broad economic, and political challenges and turmoil especially with the period of corona pandemic. She added “A May 2020 study found one in three Tunisians to be severely or very severely socioeconomically vulnerable, and their plight has likely only increased since then” (Mahjoub, 2020 as cited Wolf, 2021, p.14).

Events in Egypt exemplified in the ouster of the Muslim brotherhood from power and the harsh repression they faced afterwards, had impacted Ghannouchi. Out of the fear from experiencing similar fate, Ghannouchi distanced the party from the Muslim brotherhood, and was encouraged to show further moderation. Many western officials praised the party for shifting towards post-Islamism (Wolf, 2021, p.10). the rise of violent Salafi faction within the Tunisian political scene after 2011, and who appeared responsible for the assassinations of two secular politicians was another pressing challenge facing al-Nahda. Al-Nahda had to defend itself against severe critics coming from the media and other secular opposition parties for most of the time, it was feared that al-Nahda would carry out totalizing Islamist agenda (McCarthy, 2018, p.374). The severe criticism coming from the media, the rise of Salafism, the fate of the Muslim brotherhood in Egypt, and external western influence all impacted the party’s decisions post 2011, particularly shaping the

party's ideological struggle.

Conclusion:

In Conclusion, several struggles associated with al-Nahda's leadership can provide a plausible explanation to the party's recent political failures. Problems exemplified in dissatisfaction with Ghannouchi's lax approach with former regime members, accusations of dictatorial behaviour (lack of internal democracy), as well as a dilution of the party's ideological base, led to several defections and internal rifts within the movement affecting its organisational structure. Additionally, further external constraints exemplified in the wider political and economic stability within which the party is expected to operate successfully, the fate of the Muslim Brotherhood in Egypt, the rise of Salafism, and the continuous criticisms coming from the media and al-Nahda's secular opponents can provide further explanation to the behaviour of al-Nahda's leaders and internal party's fragmentation.

The paper generally concludes with a set of conclusions: firstly, Al-Nahda under Ghannouchi's leadership had pursued actions and undertook several measures that weakened the party's organizational structure and also affected al-Nahda's overall legitimacy. Consequently, struggles of leadership can explain to large extent the recent failings of al-Nahda. Secondly, Various external constraints in time of transition as well as high expectations from the public affect negatively the efficiency of party's leadership. Finally, the Failure of Islamists does not necessarily reflect 'failure of Islamism', other important factors are at play when understanding the behavior of Islamists.

Acknowledgment:

I would like to acknowledge the support and guidance provided by my supervisor Dr. Maha Ghalwash. Special thanks go to Dr. Ghalwash for her supervision, and invaluable suggestions and contributions to this paper.

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The Impact of Human Capital Development on Poverty Reduction: Empirical Evidence in Africa from 2000 to 2017

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Abstract:

The aim of this dissertation is to examine the impact of human capital development in terms of both education and health on poverty reduction in Africa during the period (2000- 2017). The study was motivated because of high poverty rates that characterised African developing countries. Therefore, the objectives of the study were to critically evaluate whether improvements in educational and health sector have a positive impact on reducing poverty in the case of African countries or not which is controversial. This dissertation applies a quantitative approach through econometric modelling, using the Generalized Least Square (GLS) method to estimate the Random Effect Model. Unit root tests are applied to check stationarity as well as Hausman test to take the decision between Fixed and Random Effect models. Ten variables have been selected for the purposed study including one dependent variable of Household consumption expenditures as a proxy for poverty reduction and nine other explanatory variables were modelled: per capita income (PCI), Education enrolment, “tertiary school Enrolment (TSE)”, government expenditures on health (GEH), unemployment, inflation, FDI, Trade openness and Net official development Assistance (NODA). Results show that tertiary education enrolment and governments’ expenditures on health sector as dimensions of human capital development have a positive robust impact on poverty reduction in Africa economies, income per capita growth has a statistically significant and robust impact on the incidence of poverty and education is more effective than health to reduce poverty. The study therefore recommends that the governments of the African countries should increase budgetary allocation to both education and health sectors to

improve people's intellectual capacity and raises the production capacity of the economy and therefore a reduction in poverty level. This can be achieved through establishing several skills acquisition centers across the countries.

1. Introduction:

African developing countries are still experiencing high poverty rates, a chronic problem to their developmental process. Yet, by looking at the successful experience of East Asian countries in 1970s and 1980s which was due to investment in education and health improvements stressed on the importance of human capital development for poverty reduction in developing countries. The results in either the success or failure of human capital development to curb poverty is associated with some factors mainly, the reluctance of governments in some African developing countries to allocate significant resources to the development of educational and health systems where development requires huge expected costs. Another obstacle also is the high population growth that require more resources every year, so that's considered also as a challenge for the governments. This research aims to study the impact of human capital development on poverty reduction in selected African developing countries that are presented later.

Specific Objectives of research:

This study is based on the hypothesis that attainment of high education has a positive significant impact on poverty reduction. Along with educational attainments, it relies on the hypothesis that health improvements have positively contributed to poverty reduction. Based on the abovementioned, the author of this paper attempts to answer the following three questions:

1. What is the effect of per capita income growth on the incidence of poverty?
2. What is the impact of improvements in both education and health on reducing poverty?
3. Which is more effective and significant to reduce poverty in the case of African

countries education or health?

Clear statement of research aim and Importance of research demonstrated:

The research question is whether improvements in educational and health sector have a positive impact on reducing poverty in the case of low-middle income African countries or not?

Therefore the aim of this dissertation is to examine the impact of human capital development in terms of both education and health on poverty reduction in selected African developing countries during the period 2000-2017.

Moreover, this research is expected to serve a lot of beneficiaries where the overall study is expected to contribute in enhancing the welfare to the community as well as enjoying the results of poverty reduction specifically for the poor and marginalized people. For governments, this study attempts to be a guidelines in formulating policies to address the mitigation of poverty.

This study applies a quantitative approach through econometric modelling, using the Generalized Least Square (GLS) method to estimate the equation that regresses poverty (measured by Household consumption expenditures) on human capital proxied by explanatory variables such as : per capita income, Education enrolment, tertiary school Enrolment, government expenditures on health, unemployment, inflation ,FDI, Trade openness and Net official development assistance.

Structure of paper:

This paper is divided into sections, section two reviews the theoretical and empirical literature which provides a framework on the evolution of the idea of human capital, shows the debates on the main theories on human capital, and its relationship with poverty in addition to providing a critical evaluation of the human capital theory as well as a critical examination of the impact of human capital in terms of both education and health on poverty reduction on both the theoretical and empirical levels.

Section three presents the stylized facts and data, Section 4 the methodology and econometric model, section five results, and finally section Six concludes.

2. Literature review

2.1 Theoretical Literature review

Human Capital can significantly affect poverty and reduce it through enhancing individuals' skills and knowledge which in turn result in higher wages in addition to providing them with better health Care.

There is major emphasis on human capital's impact to alleviate poverty since it is found out that developing nations and reducing poverty is unattainable in developing countries in the absence of human capital development (Mughal, 2007).

Therefore, the impact of human capital development on poverty reduction has been a fundamental issue for researchers to find remedies to the ineffective policies and programs which government have and still implementing with the aim of reducing poverty levels in developing countries. All the previously mentioned reasons can be considered as the motivations for writing the literature review section.

Therefore, this section reviews studies that examine whether human capital development through the investment in education and health improvements can significantly contribute to poverty reduction or not at both the theoretical and empirical levels.

Evolution of the idea of Human Capital: A Theoretical Framework

Human capital theory was primarily established by Adam Smith in the 18th century. According to Smith (1776), human capital is defined as "the acquired knowledge, capabilities and skills of all individuals within a society". Smith (1776) argued that education has an essential effect in improving individuals' abilities and skills which provide widespread gains on the individual levels as well as the public ones.

Schultz (1961) explained that human capital is a form of capital where the acquired skills from education become an integral portion of human which is long-persistent,

as a machine, factory, or plant lasts". Hence, human capital development through investments in education, trainings and improvements of health services will result in the enhancement of productivity of workers specifically for low-skilled ones and thus the alleviation of poverty. Additionally, Garavan, et al. (2001) debated that human capital development is an effective instrument which enables individuals to have better education, experiences and employment opportunities.

Arif, et al. (2007) added that human capital theory demonstrates how education investments enhance cognitive abilities of individuals which in return improve worker's efficiency, increase productivity and raise incomes.

Schultz (1961), Becker (1962), defended their argument by demonstrating that investments and expenditures which are directed to education, increasing the enrollment rates of years of schooling provide the acquirer with opportunities for well-paid jobs where he takes advantage of all his skills and expertise to alter and ameliorate his well-being as an individual in addition to improving his family situation through the increased income and the entire society, therefore lower poverty rates in the economy. Moreover, they pointed out that development of human capital through investments in health provide desired outcomes where they act as a complement condition with education investments to eradicate poverty because when individuals have adequate and qualified education and suffer from health deficiencies, they will not be capable of producing efficiently within the society.

In addition, endogenous growth theory stresses human capital as a source of growth where there is a robust theoretical basis for key role of education in economic growth. The endogenous growth theory predicts that productivity improvements are linked to the additional investment in human capital as well as the resulted rapid innovation. The theory suggests that positive externalities and spill-over effects from enhancement of a high valued-added knowledge economy occur which in turn induce development and reduce poverty (Romer 1986; and Lucas 1988). Evaluating the human capital theory approaches, the first three views are widely identical in that human capital development has an impact where it enhances production process

and raises workers incomes. Indeed, in various applications, human capital is regarded as a combination of these three approaches. Education and health, while disregarding research and development aspects (Duryea, 2002).

Moreover, Human capital development turned into a substantial agent for developing countries to achieve long-term development process and poverty reduction. Nations in the knowledge society of the 21st century due to "comparative advantage" are demanding fewer cheap labor endowment and natural resources and directing its focus towards more innovations and the competitive utilization of knowledge (Hanushek, 2003). Furthermore, it is argued that health improvements raise the production level and reduce the level of poverty. Additionally, Obayori (2016) suggested that the development of human capital and poverty reduction are strongly linked to each other. He argued that the alleviation of poverty is assumed to be the most complicated confrontation facing developing countries because of the prevalent poverty between the average majority of their population joined with a reduction in human capital development.

Theoretical reviews on the impact Human capital on poverty reduction:

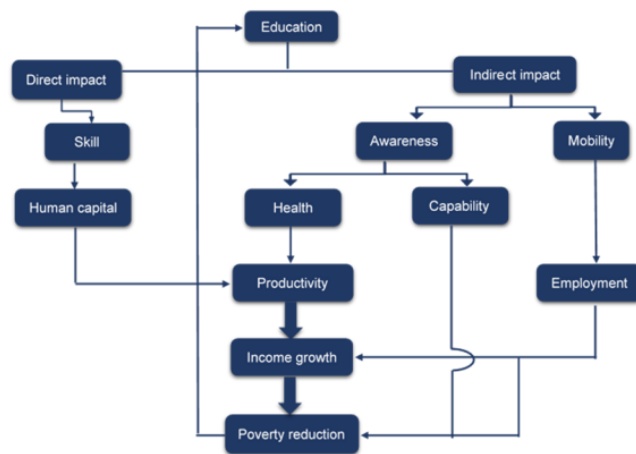
First, regarding the role of education in poverty reduction, Lockheed et al. (1980) debated that there is a robust positive relationship between the education level of households and poverty rates where investment in education provides individuals the capability to be more efficient and productive as a result of the enhanced acquired skills. In addition, they pointed out that education offers opportunities' which results in a shift in people's incomes. Those opportunities may include additional available work-related choices, more safety jobs as well as higher paid incomes. Therefore, education is the driving force to poverty reduction. This argument is supported by Benhabib, et al (1994) who debated that the higher the education attainments, the higher the per capita income growth which implies poverty reduction. They further explained that individuals who are well educated and skillful contribute with higher productivity where in competitive markets wages are set to be equal to the labor's marginal productivity, therefore the higher the productivity, the

greater the returns. They added that since poverty is inversely related to household's income level, those higher wages or incomes reduce poverty. Neil (1995) pointed out that a positive direct relationship exists between education and income growth where he decomposed income into two portions: current income due to education, increase in future income due to education. He concluded that in developing countries, this growth in income results from educational attainment which results in poverty reduction. Kooreman and et al. (1997) argued that there is a positive direct relationship between education and poverty reduction. They explained that education improves the welfare of people and the country's overall well-being through improving human qualities such as knowledge, skills and experience which positively impacts the individual's earning current income as well as raising his future expected income. They further debated that those higher levels of incomes as a result of education are associated with the reduction in poverty. In the same context, Marcus and Moore (2003) concluded that educated poor parents are more likely to have education for its coming generation because of its realized impact which implies social and income mobility. Hannum and Buchmann (2005) compared between the income level of an individual who received higher education and his counterpart who is relatively less educated and found that education improves per capita income as well as consumption expenditures and economic security. In addition, Tilak (2005) debated that education has a positive impact on the poverty reduction of households through several direct and indirect channels. They demonstrated that the direct impacts of education are represented in pecuniary benefits to individuals through increased wages or incomes received.

According to Berg (2008), there are three mechanisms through which education and poverty reduction are connected with each other. The first mechanism is represented as the more people are educated, the more the income they earn. The second mechanism can be explained as more and particularly high quality of education induces economic growth, enhances economic opportunities and improves incomes. The third mechanism is that education provides broader social gains which promote

economic development and specifically the status of the poor, for instance: lower fertility, enhanced Children's health care and increased women participation in the labor force. 11 Education impacts the individuals' capability to gain income as well as their decisions that raises the probability of success in lifetime. Therefore, direct and indirect impacts of education on poverty reduction established on the three mechanisms proposed by Berg can be explained as shown in Figure 1

Figure 1: The impact of education on poverty reduction



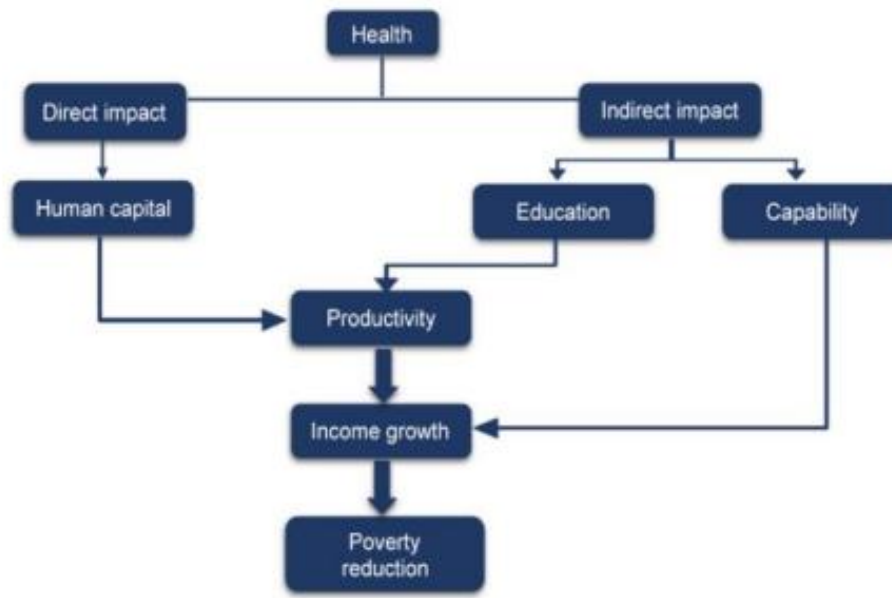
Source: Berg(2008)

They stated that through the indirect channel, education not solely improves household's incomes and raises living standards however, they linked how education indirectly has positive impact on health facilities and mortality which all in turn reduce poverty. Additionally, Nelson, et al (1966) debated that education positively contributes to technological advancement, improves the creativity of individuals and promotes entrepreneurship which improves income distribution and reduce poverty.

Education affects poverty reduction in various methods. Education creates positive externalities which can assist the poor to escape poverty. For instance, the ability of reading can guide the poor to other positive outcomes such as understanding instructions on medicine or a fertilizer bag and this knowledge gained from education will assist them to improve their health status and, leads agriculture

farm's output to rise (Janjua & Kamal, 2011). In addition, Shah (2011) stressed on the impact of education in empowering individuals, supporting flexibility and health in the environment, encouraging competitiveness in the economy, improving earnings and thus discouraging and reducing poverty. Furthermore, contributions by Zamurrad and Ahmed (2014) to study the effect of education on poverty mitigation have manifested that increasing education enrollment has contributed to rapid economic growth and poverty reduction through the increased income of masses. Second, regarding the role of health improvements in poverty reduction, according to World Health Organization (2000), health refers to "the situation of integral physical, mental, and social wellbeing as well as the efficiency of functional level of human being". Similarly, this was supported by Gunetilleke (2000) who argued that increasing public expenditures on health will allow the poor the access to improved health which prevents them from resorting to use all their tiny incomes or sell their assets to face illness where unhealthy individuals are more threatened to become income poor. Furthermore, Lawson (2004) stressed the direct impact of human capital development in terms of health on poverty reduction where he believed that lack of health conditions are an aspect of multidimensional poverty. He further added that lack of health is linked with people dropping into poverty where it prevents people from education opportunities as well as employment opportunities. Moreover, Bloom et al. (2004) debated that improved health has a positive considerable impact on per capita income growth and reducing poverty where they explained that health impacts income and poverty situation through various channels as shown in figure 2.

Figure 2: The Impact of Health on poverty reduction



Source: Bloom, Canning & Sevilla (2004)

Knapp (2007) argued that improvements in health are directly related to poverty reduction where they increase practical and intellectual capabilities of individuals which enhances labor productivity. They supported their argument through explaining that the physical ability to work relies on the individual's health situation where healthy workers are more likely to produce efficiently and increase the production level compared to unhealthy workers. This higher productivity and capability to work allow individuals to gain more income as well as high life expectancy rates.

Additionally, Rasaki (2011) argued that enhancing health has a positive impact on schools and universities' performance as well where children who do not suffer from health deficiencies have the ability to learn better which increases the number of enrollments of education in both schools and universities which results in more educated people within the society earning well-paid jobs, thus reduce poverty. The next section will show the gap found in the literature through the empirical reviews to critically investigate the effect of human capital development in terms of both education and health on poverty reduction.

2.2. Empirical literature:

This section presents the empirical evidence regarding the impact of human capital development in terms of education and health on poverty reduction. Empirical studies reveal the existence of pro-poverty reduction, anti-poverty reduction and insignificant impacts. This section is organized as following first with the positive impact of human capital on poverty then with the negative impact of human capital development on poverty and finally with the neutral impact of human capital development on poverty, Also the studies are organized in chronological order.

Empirical studies that report a positive impact of human capital on poverty.

An early and influential empirical work by Barro (1996) investigated the impact of health improvements on poverty alleviation for a crosssection of countries for the years 1900, 1930 and 1960. He modelled life expectancy and per capita income and found out that health improvements are significantly positive to poverty reduction. Additionally, Gunetilleke (2000) investigated the effect of increase in health improvements on alleviation of poverty in South Africa for years of study 2000-2014 using GCE model and his results proved that more improvements in health sector implies less the poverty rates. Bils, et al. (2000) studied the impact of education on poverty reduction in SAARC countries during 2000 using multiple regression econometric model. They concluded that high enrollments rates of education have contributed positively to Per capita incomes and household's consumptions which results in declining poverty rates. Moreover, Gylfason et al. (2003) examined the impact of education enrollments through measuring tertiary school enrollments using random effect model in Nigeria during 2002-2003. They concluded that increasing the expected years of schooling have a positive significant impact on poverty reduction where they have prompted income growth. Self et al. (2004) conducted a study using granger causality test in India during 2004 2006 to investigate the impact of education on income growth and poverty alleviation. Their results 15 suggested that tertiary school education has a robust significant impact on reducing poverty levels in India. Moreover, Bloom et al. (2004) examined the impact of public expenditures on health on poverty alleviation using a sample of six African countries during 1995-2005 using GLS technique. Their results confirm the existence of a direct positive relationship between government expenditures on health and poverty reduction. In addition, Babatunde and Adefabi (2005) examined the impact of investment in education on poverty reduction during 1970-2003 in Nigeria. Furthermore, Zamurrad, ahmed (2014) studied the impact of health

on poverty reduction using a sample of 40 developing countries during 1999-2007 through data envelopment analysis for empirical estimation. Their results suggested that health improvements are strongly and positively associated with lower poverty rates. Chikelu (2016) examined the impact of tertiary education enrollments on poverty reduction using OLS technique and cointegration. He included per capita income growth in his study as one of the main determinants that reduce poverty. His results provided that there is a robust direct impact of the selected variables on poverty reduction in Nigeria during 1986-2012. Similarly, this was supported by the empirical work of Johansen cointegration, and vector error correction method were used to test this relationship. Their results provided the existence of a positive long run relationship between them where when labor receive more education, they produce more efficient and this improved productivity levels contribute positively to poverty reduction. In addition, Udeorah, et al. (2018) examined the impact of human capital investment in both health and education through applying econometric methods of unit root tests and GMM tests in Nigeria. He modeled poverty level as his dependent variable and two explanatory variables: health expenditure and education expenditure. They concluded that both government expenditure in health and education are positively and significantly related with poverty reduction.

Empirical studies that report a negative impact of human capital on poverty:

In addition to the empirical work of Jutting & Asfaw (2007) who studied the impact of health public expenditures on poverty reduction in Senegal in 2007 using econometric model and found out that the impact of these expenditures was negatively significant because the poorer groups and rural households were not covered by health insurance plans therefore these health expenditures were significant negative in benefiting the poor

On the contrary, Risikat (2010) conducted a study using cointegration and error correction techniques to investigate the impact of education investments in Nigeria during 2010-2011 and the results were negatively significant to poverty reduction.

Empirical studies that suggest a neutral impact of human capital on poverty:

In addition to Ararat (2007) who conducted a study on Ukraine and Russian Federation during 2007 using VEC Model to study the impact of educational enrollments on poverty reduction. He concluded that there is no significant impact between them where he found

out that higher education is associated with per capita growth rates and reduction in poverty levels only in the long run. Nevertheless, Ozoana (2013) investigated the impact of increasing public spending on education and health on poverty reduction in Nigeria over the period 1980-2011. He conducted his study using multiple regression analysis. His findings suggest that the impact is insignificant. This was supported by the findings of Ogundipe and Lawal (2013) who explored the impact of health improvements on poverty reduction in Nigeria during 1980-2011 using GMM technique, Their results have revealed a statistically insignificant impact. In conclusion, this section examines the impact of human capital in terms of both education and health on poverty reduction on both the theoretical and empirical levels. Empirical studies revealed the existence of pro-poverty reduction provided by Barro (1996), Gunetilleke(2000), (Gylfason et al, 2003), Bloom et al(2004), (Self et al,2004),(Babatunde et al, 2005), (Zamurrad et al,2014) (Chikelu, 2016) as well as anti-poverty reduction provided by (Jutting et al,2007) , and Risikat (2010) neutral impacts provided by Ararat(2007), Ozoana(2013), and Ogundipe and Lawal(2013).

3. Data description and Stylized Facts:

3.1 Data description

The empirical model of the study includes Nine variables. The dependent measure is household consumption expenditures used as a proxy for poverty. The Eight independent variables include GDP per capita, Education enrollment, current health expenditure (CHE), unemployment, inflation , foreign direct investment (FDI), trade openness and net official development assistance.

Table 1: Variables names with Definitions

Variable Name:	Definition:	Citation
Household consumption expenditures (constant 2015 US\$):	Household consumption expenditures refers to the purchases that households make which are restricted upon their income level category to earn a living and they represent the largest component of final uses of GDP. The estimation of poverty reduction adopted in this study is based on household consumption expenditures. The economic theory suggests that increases in household consumption expenditures means that the individual is becoming less poor now, therefore more consumption expenditures by households imply poverty reduction.	Odhiambo (2009), Ho and Iyke (2018), and Magombeyi et al, (2018).
Per capita income, GDP per capita (constant 2015 US\$):	Per capita income refers to the average income earned by an individual in a particular area such as countries in this study during a given time and it is often used as a measure of country's standard of living.	Ravallion & Chen (1997), Dollar and Kraay (2002) Besley & Burgess, (2003), Self and Grabowski (2004), Bourguignon (2004), Asaju (2012), Chikelu (2016), and Fosu (2017).

	The economic theory suggests that the impact of growth in per capita income is positively related to poverty reduction and has a robust impact. It was revealed that increase in per capita income of a country will eventually result in reducing poverty due to the associated increase in individuals' incomes and that growth rates of income per capita was more effective towards the incidence of poverty.	
Education enrollment, “tertiary school Enrollment”:	Tertiary education enrollment refers to the total percentage of students who are high school graduates and are expected to be enrolled into universities to receive more education. This variable is considered a proxy for the impact of investment in education (accumulation of human capital) on poverty reduction. The economic theory suggests that there is a positive strong significant impact of tertiary education enrollment on poverty reduction where it was revealed from both theoretical and empirical literature that better educated and skilled workers contribute to high productivity and innovation which ultimately results in poverty reduction.	Bilsand and Klenow, (2000) Sylwester (2002), Gylfason and Zoega (2003) Babatunde and Adefabi (2005) Zamurrad, Ahmed (2014) Chikelu (2016)
Current Health expenditures(CHE) (converted into Ln):	Current health expenditure (CHE) describes the share of spending on health in each country relative to the size of its economy. It includes expenditures corresponding to the	Barro (1996) Gunetilleke (2000), Bloom et al. (2004).

	final consumption of health care goods and services and excludes investment, exports, and intermediate consumption. This variable is considered a proxy for the impact of improvements in health as one of the dimensions of human capital development on poverty reduction. The economic theory exhibits a positive direct strong impact of CHE on poverty reduction as shown in the literature review.	
Unemployment, total (% of total labor force):	Unemployment refers to the population of labor force who are seeking the opportunities to work, however, they are unable to find one and it is measured in this study by unemployment rate as a percentage of total population. The economic theory suggests that unemployment has a strong negative relationship to poverty reduction whereas the unemployment rates increase, the dependency ratio increases which as well contribute negatively to reducing poverty. Moreover, it was revealed that the majority of poor individuals struggle from temporary or permanent unemployment and that those poor who get employment opportunities were able to have social mobility and escape poverty.	Osinubi (2005).
Inflation, consumer prices (annual %):	Inflation is defined as the general rise in price level of commodities and services in an economy over a specific period of time which results in the decline of the purchasing power of nation's currency and individual's income.	Fischer (1993), Barro (1996).

Foreign Direct Investment, net inflows (% of GDP):	Inflation is considered one of the main and robust determinants of poverty and it is measured in this study by GDP deflator. The economic theory suggests that inflation has a strong negative impact on poverty reduction where it has been argued that high inflation rates are associated with low purchasing power of individuals and the inability to afford basic life needs which discourages poverty reduction. FDI refers to the investments executed by one firm into another which often exists in other country, and it is measured by FDI inflows. The economic theory suggests that FDI has a positive direct relationship on poverty reduction where FDI represents a source of transmission of capital and technology from developed to developing countries which is represented as a “catch up effect” that ultimately contribute to poverty reduction.	Jalilian et al (2002), Gohou et al(2012), Fowowe, et al (2014), and Soumare (2015).
Trade openness, Trade (% of GDP):	This variable refers to the trade policy orientation of the country. The economic theory suggests that trade openness has a direct positive relationship on poverty reduction where a more open country permits the knowledge and skill's transmission to its labor force, which positively impacts poverty reduction.	Grossman et al (1991) Edwards, 1998; Frankel et al, (1999).

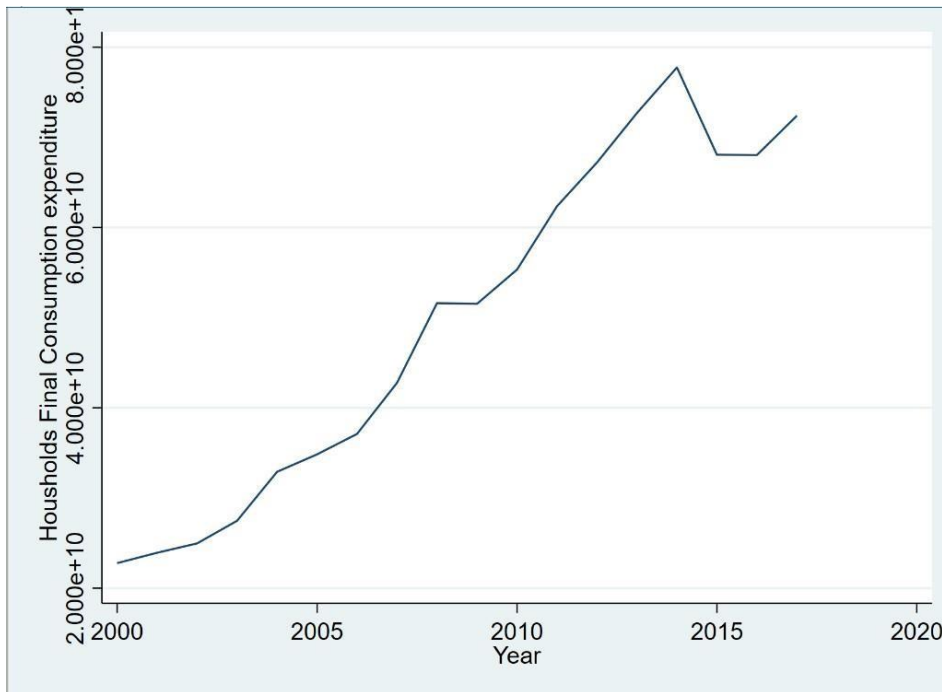
Net official development assistance received (NODA)(constant 2020 US\$):	NODA refers to grants by official agencies of the Development Assistance Committee (DAC), by multilateral institutions, and by non-DAC countries with the aim of promoting economic development and welfare in less developing countries. The economic theory suggests that the impact of NODA on poverty reduction can be positive or negative depending on how the benefits of the grants and loans will be distributed. Gupta, et al.(2004).

The study is conducted on 54 African countries. These countries are facing high poverty rates, lack of education and health development and direct more of its resources to military expenditures. The study is recent and longitudinal where it covers a sample period of 18 years. This period from 2000-2017 was selected to include a wide range of years and previous periods were not covered in the analysis because of data unavailability. The study uses panel data which provides sufficient observations and combining time series and cross sectional together make data set able to provide more insights on the topic of study over two dimensions not only one as well as it enlarges the sample size. For the proposed model, the study uses secondary quantitative data obtained from World Development Indicators “WDI” Official website. WDI is the most authentic and reliable secondary data source which ensures reliability of data. In addition to other trusted macro databases such as UNDP and UNESCO.

3.2 Stylized Facts

Figure 3 shows the evolution of the Household consumption expenditure for Africa from 2000 to 2017. It shows that there is an increase in the Household final consumption through the years but then in 2014 the rate started to decrease Followed by a tendency of increase in 2016.

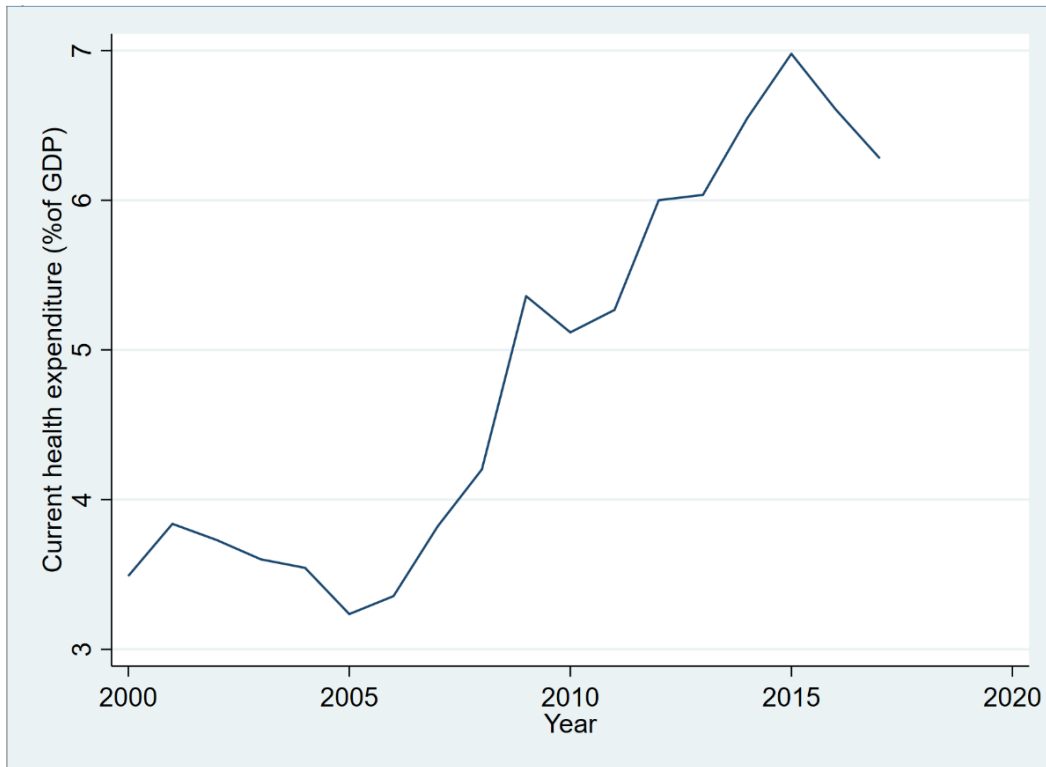
Figure 3: Household Final Consumption Expenditure for Africa from 2000 to 2017



Source: Constructed by the author using data from World Bank - 2023

Figure 4 shows the Current health Expenditure for Africa from 2000 to 2017, And It shows that there's slow increase in the health sector expenditure and the peak was in 2015 but after that It started to decrease.

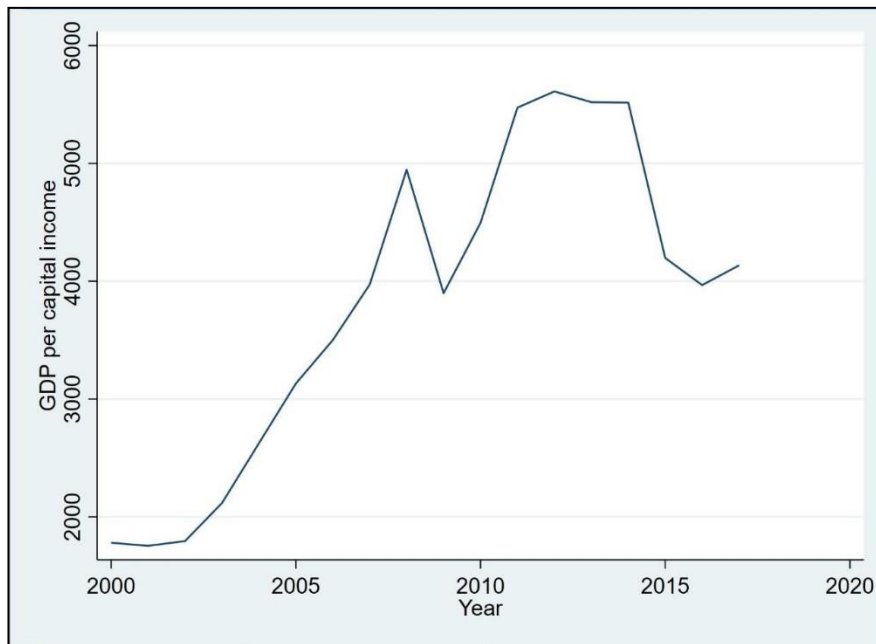
Figure 4: Current Health Expenditure for Africa from 2000 to 2017



Source: Constructed by the author using data from World Bank - 2023

Figure 5 shows the GDP per capita for Africa from 2000 to 2017, Its obvious that there is increasing rate in the GDP per capita through the years, until 2008 then there's a slight decrease in the GDP per capita because of the financial crisis in 2008, but then it started to recover in 2010, and then decreased in 2014.

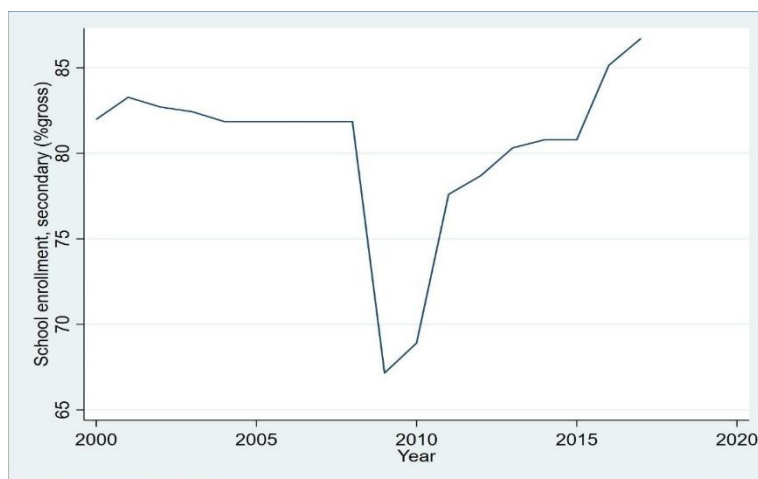
Figure 5: the evolution of GDP per capita for Africa from 2000 to 2017



Source: Constructed by the author using data from World Bank - 2023

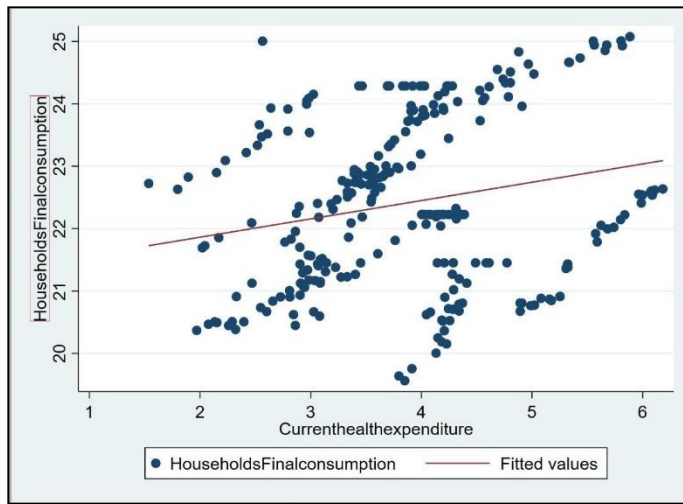
Figure 6 presents the School Enrollment Tertiary for Africa from 2000 to 2017, It's Obvious that its going on a consistent rate through the years then decreased in 2010 and followed by an increasing rate from 2011.

Figure 6: School Enrollment Tertiary for Africa from 2000 to 2017



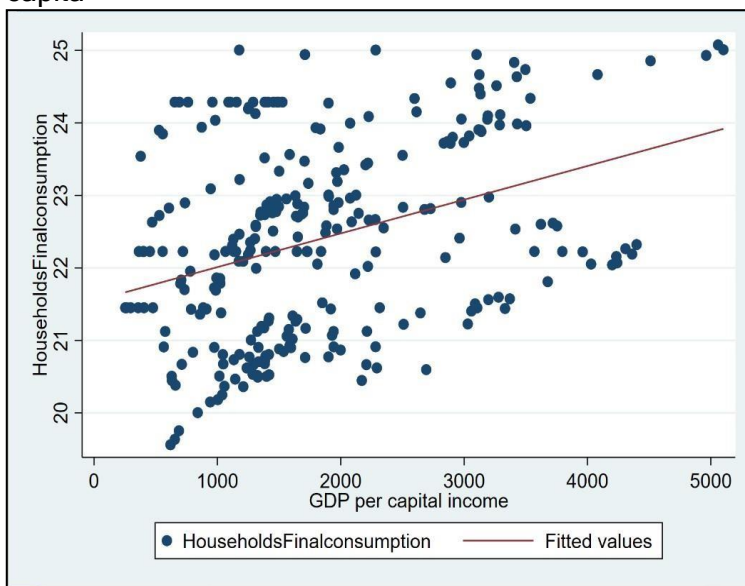
Source: Constructed by the author using data from World Bank - 2023

Figure 7: Correlation between Household Final consumption expenditure and Current health expenditure.



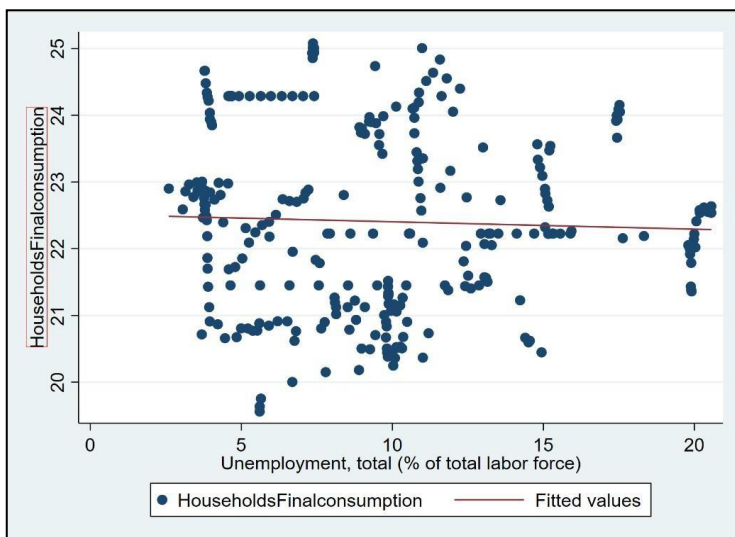
Source: Constructed by the author using data from World Bank - 2023

Figure 8: Correlation between Household Final Consumption expenditure and GDP per capita



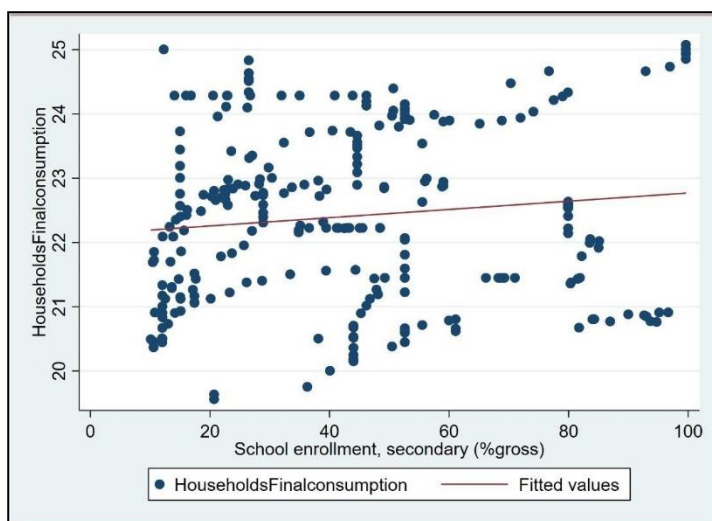
Source: Constructed by the author using data from World Bank - 2023

Figure 9: Correlation between Households Final Consumption expenditure and unemployment.



Source: Constructed by the author using data from World Bank - 2023

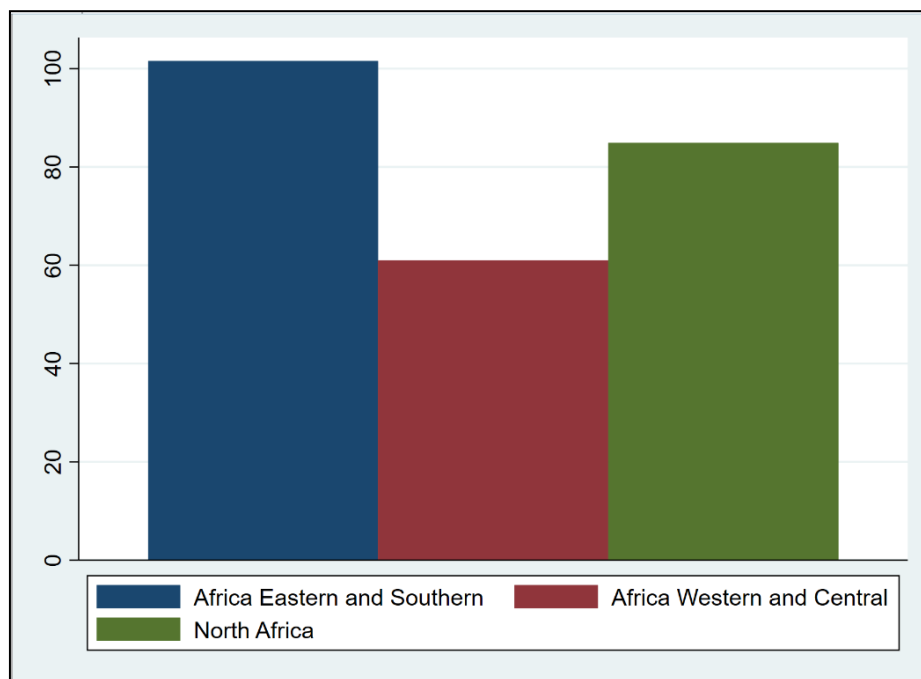
Figure 10: Correlation between Households Final Consumption expenditure and Education enrollment, Secondary school Enrollment (SSE).



Source: Constructed by the author using data from Word Bank - 2023

Figure 11 shows the current health expenditure for African regions, Africa western, central and North Africa. The Western and Central region spends around 60 million dollars while Eastern and Southern countries spend around 100 million for health and finally for North Africa spends around 80 million dollar on health.

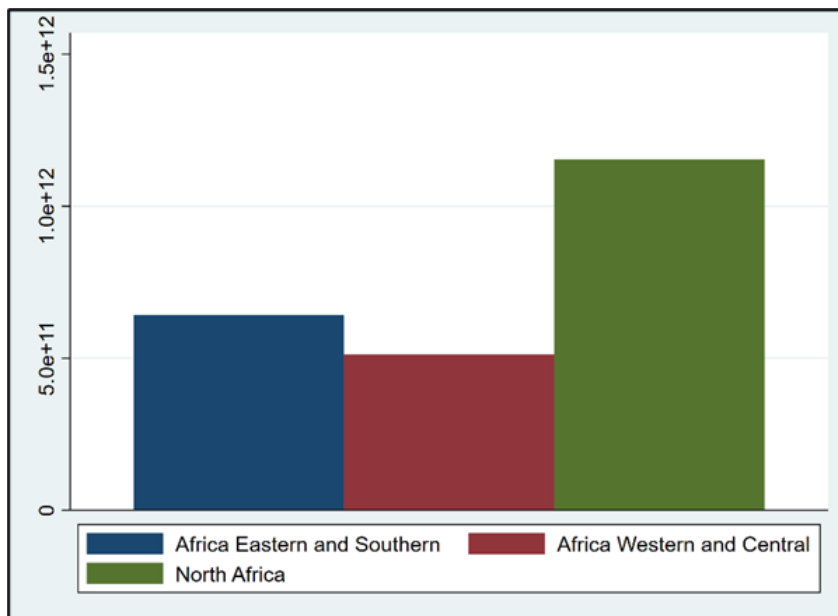
Figure 11: Current Health expenditure For Africa in 2017



Source: Constructed by the author using data from World Bank - 2023

Figure 12 shows the final consumption expenditure for African regions in 2017, On the first place comes North Africa with the highest spending on consumption, then the eastern and southern region, finally in the last position comes the western and central region.

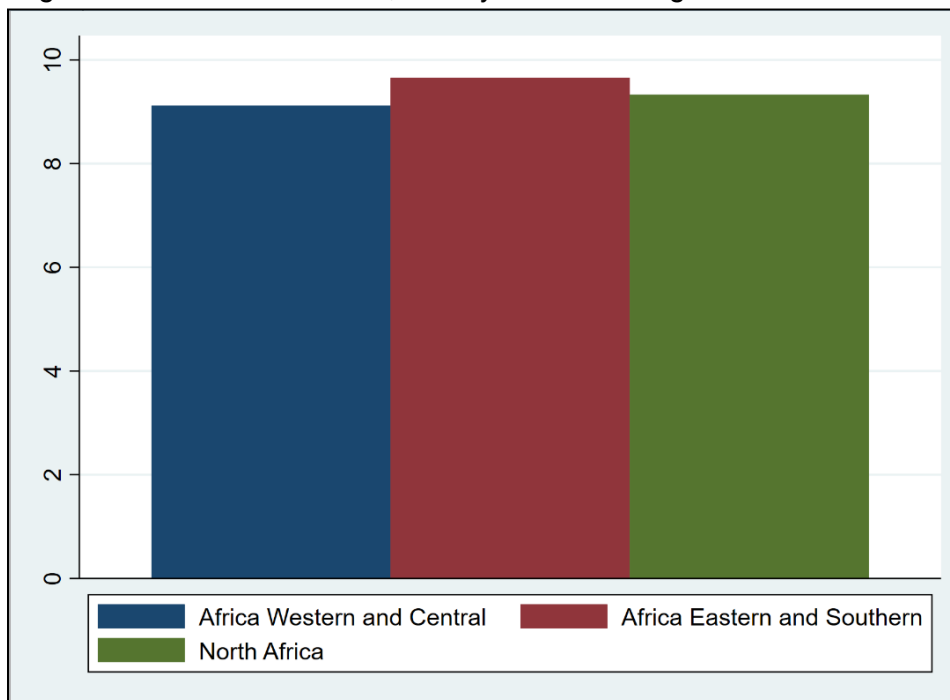
Figure 12: Households and Final consumption expenditure for African regions in 2017



Source: Constructed by the author using data from World Bank - 2023

Figure 13 shows the school enrollment tertiary for African regions in 2017, On the first place comes the western and central region, It is the highest region for the school enrollment, Then after in the second place comes north Africa and at the least comes the eastern and southern region. The countries in South Africa are already done much better in the development work along with education system by increasing the literacy rate in the country whereas the countries of West Africa are still too much back warded about the literacy in their society. These two parts of the continent are opposite to each other about the awareness and beneficial factors of education. If we talk about countries in West Africa then they are even moving back from the development and all because they are not aware of the importance of education, and beside this, they are unaware of the present condition of their country which is already underdeveloped. The literacy rate of South Africa is higher than that of West Africa because of lifestyle, political conditions, and economical factors.

Figure 13: School enrollment, tertiary for African regions in 2017.



Source: Constructed by the author using data from World Bank - 2023

Section 4: Explain data, econometric equation, variables and expected sign of coefficients.

Checking heteroscedasticity

In accordance with the panel data's proposed model nature, variability between the study's cross-sections may lead to the existence of heterogeneity among them. Therefore, the author carried out Lagrange Multiplier test to ensure that the model does not suffer from having nonconstant error term variance which is Heteroscedasticity problem Yang and Baltagi ,(2013). The null hypothesis of test assumes that the variance of the residuals is constant over time where the model does not suffer from Heteroscedasticity. since the P-value is greater than level of significance of 10%, therefore, it can be concluded that there is no strong evidence of having heteroskedastic residuals cross the panels.

Hausman test:

In this section, data are analyzed, and results are presented for two estimated models: model 1: Fixed effect model and model 2: Random effect model. Hausman test was carried

to decide which model is better to be used. The null hypothesis of the test states that the model will be estimated using Random effect. The decision is taken according to p-value based on a significance level of 5 %. After carrying the test, the p-value is 0.526 which is more than significance level, therefore we cannot reject null hypothesis which interprets that the best estimation technique is RE, therefore the author selects model 2 because it is a better fit. In addition, this model is used when homogeneity exists between countries, which supports the author's study.

The Econometric model:

$$\begin{aligned} \text{Household Consumption expenditures}_{it} &= \text{percapita income}_{it} + \text{Tertiarieschool Enrollement}_{it} \\ &+ \text{Gov.health expenditures}_{it} + \text{unemployment}_{it} + \\ &\text{inflation}_{it} + \text{FDI}_{it} \\ &+ \text{Trade openness}_{it} + \text{NODA}_{8it} + \varepsilon_{it} \end{aligned}$$

Where:

β_0 : intercept or constant term.

$\beta_1 \dots \beta_8$: Parameters of the regression coefficients of the model Household consumption expenditures (constant 2015 US\$): Household consumption expenditures refers to the purchases that households make which are restricted upon their income level category to earn a living and they represent the largest component of final uses of GDP.

Tertiary school enrollment=enrollment Rate (%) as a proxy of improvements in education improvements one of the dimensions of human capital development.

Current Health expenditures (CHE) (converted into Ln): Current health expenditure (CHE) describes the share of spending on health in each country relative to the size of its economy.

FDI= Foreign direct investment.

Inf=Inflation Rate (%).

Unemp=Unemployment Rate (%).

NODA: Net official development assistance (\$).

ε_t =Error term.

where $i = 1, 2, \dots, 54$ refers to the number of countries.

$t = 2000, 2002, \dots, 2017$ refers to the time span.

After running Hausman test to check whether to use fixed or random effect and Lagrange multiplier test to check heteroscedasticity.

This study uses the Generalized Least Square (GLS) method to estimate the equation that regresses poverty (measured by Household consumption expenditures) on human capital proxied by explanatory variables such as: per capita income, Education enrolment, tertiary school Enrolment, government expenditures on health, unemployment, inflation, FDI, Trade openness and Net official development assistance.

The research question is whether improvements in educational and health sector have a positive impact on reducing poverty in the case of low-middle income African countries or not? Therefore, the aim of this dissertation is to examine the impact of human capital development in terms of both education and health on poverty reduction in selected African developing countries during (2000-2017). The methodology applied is quantitative approach through econometric modelling, using the Generalized Least Square (GLS) method to estimate the Random Effect Model. In addition to unit root tests to check stationarity, Fixed and random estimation model using Hausman test. This approach involves collection of data, descriptive and inferential statistics.

Table 4 :The expected signs of explanatory variables on poverty reduction

<u>Variables and proxies</u>	<u>Expected Sign</u>	<u>Citation</u>
Per capita income	Positive	Ravallion & Chen (1997), Besley & Burgess, (2003) (Chikelu, 2016). Self and Grabowski (2004) Asaju (2012) Bourguignon (2004) Fosu (2017) ., (Dollar and Kraay 2002) Zamurrad & ahmed (2014).
tertiary school Enrollment	Positive	Zamurrad, ahmed (2014) Chikelu (2016) Babatunde and Adefabi (2005) Bilsandand Klenow, (2000) Gylfason and Zoega (2003) Sylwester, (2002)

government expenditures on health	Positive	Bloom et al. (2004), Barro(1996) Gunetilleke (2000)
Unemployment	Negative	Osinubi (2005)
Inflation	Negative	Barro, 1996; Fischer, 1993
Foreign direct Investment	Positive	Jalilian & Weiss, 2002; Soumare (2015), Fowowe and Shuaibu (2014), , and Gohou and Soumaré (2012)
Trade openness	Positive	Grossman & Helpman, 1991 , Edwards, 1998; Frankel & Romer, 1999;
Net official development assistance (NODA)	positive	Gupta, et al. (2004)

Source: author's contribution

In Conclusion, after describing the data set and methodology, it will be more appropriate now to discuss the research results.

5.Results, Econometric and Economic interpretations

Based on the results, the regression line has a positive intercept as presented by the constant (c) =4.602577 which explains that if all variables of study are fixed to zero), poverty reduction which is proxied by log household consumption expenditures will be valued on average at 4.602577 %. According to estimated parameters, when per capita income increases by 1 % the household consumption expenditure which reflects poverty reduction level is expected to increase on average by 0.9750636% all else equal. When the Tertiary school Enrollment increases by 1 %, the household consumption expenditure (HCE) reflecting the decline in poverty will increase on average by 0.955303 % all else equal. When the government health expenditures increase by 1 %, HCE will increase on average by 0.8325055 % all else equal. When the unemployment rates increase by 1 %, HCE Will decline on average by 0.7125521 % all else equal. When inflation rates rise in the economy by 1 %, the HCE will fall on average by 0.8112962 all else equal. When FDI

increases by 1 %, the HCE will increase by 0.55281% on average all else equal. When trade openness increases by 1 % HCE will increase by 0.4811313% on average all else equal. The increase in NODA is associated with a reduction in HCE by 0.00034093 % all else equal. From the regression result, the coefficient of determination R^2 and F- statistic explains to which extent the estimated parameters are statistical reliable. the overall coefficient of determination of model R^2 is 0.6849 which implies that the independent variables can explain 68.49 % of the variations in dependent variable and the rest is due to error. Therefore, 68.49% on average of the variations in poverty reduction are being accounted for or explained by the variations in the selected regressors while other determinants of poverty reduction not captured in the model explain about 31% of the variation in poverty reduction in the countries of study. Therefore, this confirms that the explanatory power of the selected variables is moderately high and robust. According to F-statistic, the overall significance will be checked. The null hypothesis states that the model overall is insignificant $\beta_1 = \beta_2 = \beta_k = 0$. Based on p-value of the chi2 statistic which is (0.0000) less than all significance levels. We reject null hypothesis which means that the overall estimated model has a goodness of fit and is statistically reliable and significant. This confirms that there is a significant impact between the dependent and explanatory variables in the model. Moreover, it is shown from the results that all explanatory variables have low standard errors. The low values of standard errors confirm that a high level of confidence can be placed on the estimates. P-value of parameters are checked to test significance of them. The null hypothesis states that "this parameter is not significant. $\beta_k = 0$ ". The p-values of constant (0.000), $\ln pci$ (0.034), $\ln edu$ (0.000), $\ln health$ (0.000), $\ln unemp$ (0.007), $\ln inf$ (0.011), $\ln fdi$ (0.006), $\ln trade$ (0.000) are all less than significance level which means we reject H_0 . This implies that all the parameters are significant and should be included in the model. The p-value of $\ln noda$ is 0.804 which is more than significance level, therefore we cannot reject null which means that this parameter is not significant, however the a-priori expectation is that $noda$ does not have a significant impact on poverty reduction which matches the economic theory.

Economic interpretations of results

Based on the results, first: tertiary education enrollment and governments expenditures on health sector as dimensions of human capital development have a positive robust

impact on poverty reduction in low-middle income African developing economies. The obtained result matches the theory, where the economic theory suggests that increasing public expenditures on health will allow the poor the access to improved health which prevents them from resorting to use all their tiny incomes or sell their assets to face illness where unhealthy individuals are more threatened to become income poor. Thus, health expenditures can reduce poverty effectively, and that education allow poorer groupsto escape from the vicious circle of inadequate education, poor trainings, low productivity and low paid jobs where education constitutes an influential factor to improve labor productivity of the poor and investment in education promotes technology and innovation particularly in the case of developing countries which upgrades economic growth and alleviates poverty which are confirmed from the literature review by a stream of authors 1. The results obtained also matches the a-priori expectations, so they conform to the empirical studies by 2 . The second outcome is that all obtained signs of all variables match the economic theory and the magnitude of coefficient for each variable obtained matchesthe theoretical expectation as well. Third, income per capita growth has a statistically significant and robust impact on the incidence of poverty. which matches the theory as confirmed by Ravallion et al.(1997) , Besley & Burgess, (2003).,Self and Grabowski (2004) ,and Zamurrad& ahmed (2014).Fourth: results provided indicate that in the case of African economies, education is more effective than health to reduce poverty which answer the stated hypothesis by the author. Eventually, even the insignificance of Net Official Development Assistance variable matches the economic theory, where the theory suggests that Net official development assistant has insignificant weak impact on poverty reduction where the theory demonstrates the fact that some sorts of foreign serve developed donor countries' interests rather than enhancing the situations of recipient developing countries, in turn they may discourage poverty reduction Guptaet al. (2004)

1 Lockheed et al.(1980), Hannum and Buchmann (2005) Berg (2008), Knapp (2007) "see literature review chapter 2". 2 Barro (1996) Gunetilleke (2000), Babatunde et al.(2000), Sylwester, (2002),Gylfason and Zoega (2003) Bloom et al.(2004), Zamurrad, ahmed (2014) Chikelu (2016)." Matches the empirical literature"

Two proposed econometric models

Table 2 : Estimated fixed and Random effect models

Variable	Model 1			Model 2		
	Fixed effects model			Random effects model		
	Coef.	Standard error	P-value	Coef.	Standard error	P-value
L PCI	0.763453	0.0368849	0.076	0.9750636	0.0328521	0.034
L edu	0.7513984	0.0403549	0.016	0.9553039	0.0352747	0.00
L health	0.7875234	0.0806547	0.001	0.8325055	0.0672084	0.00
L unemp	-0.6166159	0.0642017	0.796	-0.7125521	0.0058517	0.007
L inf	-0.7664447	0.0140446	0.245	-0.8112962	0.0001747	0.011
L FDI	0.4023912	0.0254005	0.925	0.55281	0.0039547	0.006
L trade	0.3833839	0.056996	0.002	0.4811313	0.0510644	0.00
L NODA	-0.0064361	0.0154857	0.679	-0.0034093	0.013727	0.804
Cons	4.751375	0.6072091	0.00	4.602577	0.460439	0.00
	R Squared =0.5895			R2 Squared =0.6849		
	P-value of F-statistic =0.0000			P-value of F-statistic =0.0000		

Source: Author's Contribution

6. CONCLUSION AND POLICY RECOMMENDATION:

Eventually, this section summaries the key findings of the dissertation, provides policy implications and shows research limitations.

6.1 Summary of key findings:

In conclusion, this paper studied the impact of human capital development in terms of both education and health on poverty reduction in African countries over the period “2000-2017”. The paper has provided a theoretical framework on the evolution of the idea of human capital and showed the debates on the main theories on human capital as endogenous growth theory as well as a critical evaluation of human capital theory. Moreover, this paper has evaluated the impact of human capital development in terms of education and health on poverty reduction whether they have complemented or hindered each other which is debatable. The main findings from the literature have shown that: education has a positive impact on the poverty reduction of households through several direct and indirect channels where the direct impacts of education were represented in pecuniary benefits to individuals through increased wages or incomes received as individuals who are well educated and skillful contribute with higher productivity. Second, enhancing health has a positive impact on schools and universities’ performance as well where children who do not suffer from health deficiencies have the ability to learn better which increases the number of enrollments of education in both schools and universities which results in more educated people within the society earning well-paid jobs, thus reduce poverty. Also, it is concluded from the empirical literature, that there are contradictory studies on the impact of human capital in education and health on poverty reduction. The research has tested this impact through the application of a quantitative approach through econometric modelling, using the Generalized Least Square (GLS) method to estimate the Random Effect Model. unit root tests are applied to check stationarity as well as Hausman test to take the decision between Fixed and Random Effect models. The results showed that tertiary education enrolment and governments expenditures on health sector as dimensions of human capital development have a positive robust impact on poverty reduction in low-middle income African developing economies, income per capita growth has a statistically significant and robust impact on the incidence of poverty and education is more effective than health to reduce poverty. 43

6.2 Policy recommendations:

Based on these findings, the study therefore recommends that the governments of African countries should increase budgetary allocation to both education and health sectors to improve people’s intellectual capacity and raises the production capacity of the economy and therefore a reduction in poverty level. This can be achieved through establishing

several skills acquisition centers across the countries. This policy option is recommended because of the multiplier impacts that they will produce on the economy. Moreover, establishing these skills centers alone is not sufficient, it is recommended to have proper control mechanisms over them to ensure they will achieve the expected outcomes. In addition, it is recommended for governments to co-ordinate several poverty reduction programs that exist in low-middle African economies and consolidate them with the development of a comprehensive framework directed to human capital development. Hence, governments have to check that capital and recurrent expenditures are properly managed in a manner that it will increase the production capacity and upgrades economic growth and reduce poverty in the country.

6.3 Research Limitations

The author of this paper faced several limitations starting from the chosen period of study 2000-2017 where the analysis attempted to include more years and it could not cover previous periods due to the unavailability of data. Another essential limitation is the challenge of choosing African group countries where the author suffered from missing values which resulted from using unbalanced panel data set. The data for the included sample of countries over the period of study was not easily collected where the collection of data was quite complex and challenging because those poor African countries often lack availability of data and credibility due to high bureaucracy systems (Barro and Lee, 1993). However, the author managed to contribute to the empirical work with this dissertation.

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Appendix

Table A-1: List of countries

Country Name
Algeria
Angola
Benin
Botswana
Burkina Faso
Burundi
Cabo Verde
Cameroon
Central African Republic
Chad
Comoros
Congo, Dem. Rep.
Congo, Rep.
Cote d'Ivoire
Djibouti
Egypt, Arab Rep.
Equatorial Guinea
Eritrea
Eswatini
Ethiopia
Gabon
Gambia, The
Ghana
Guinea
Guinea-Bissau
Kenya
Lesotho
Liberia
Libya
Madagascar
Malawi
Mali
Mauritania
Mauritius
Morocco
Mozambique

Namibia
Niger
Nigeria
Rwanda
Sao Tome and Principe
Senegal
Seychelles
Sierra Leone
Somalia
South Africa
Sudan
Tanzania
Togo
Tunisia
Uganda
Zambia
Zimbabwe

Table A-2: Hausman test

Test	Prob > chi2
Hausman/test	0.526

Source: Author's Contribution

Table A-3: Lagrange multiplier test

Lagrange multiplier test	P-value
	0.6523

Source: Author's Contribution

European Women in IS: An Analysis of the Socio-Political Environment in Relation to Second and Third Generation Migrants in Western Europe

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Abstract:

Statistics show that at least 20% of IS' European members are women (Gaub and Lisiecka, 2016). In 2019, it was estimated that two thirds of European women who joined IS since 2014 are second and third generation migrants, while one third are new Muslim converts (Vale, 2019). These women have been identified by European authorities and scholars, since late 2013, as "IS fan-girls" (Ben-Israel, 2018). Besides, scholars, until today, did not settle on the reasons why these women joined IS (RAN, 2017). In fact, the reasons are diverse, due to diversity in these women's profiles in terms of age, financial and social status, educational levels, etc.

Thus, the question this paper attempts to answer is: Why are European Women receptive to IS' call? Hence, the proposed research will focus on second and third generation migrants of European women who joined IS; to investigate the socio-political factors in their home countries (i.e. push factors) that encouraged them to join IS and fight against their home- lands. The paper argues that having women joining the "Islamic cause" is a strategic shift in IS' thinking to fight against westernization and build the "Islamic Empire". In support of their cause, women (life-givers) are to take life from those who do not deserve it from IS' perspective (i.e. Western infidels). In addition, there is nothing more effective than relying on western agents to fight westernization.

This phenomenon is facilitated by political and social discrimination against Muslims, in general, and Muslim women in particular in Europe.

This research is important; as attention should be paid to the different

Aspects and reasons that hinder peace and stability, which is considered the building block towards development and sustainability.

The paper adopts a qualitative approach in answering the research question; whereas a selection of documentaries and News Reports from online newspapers, as The Guardian and ABC News, about the lives of European women who joined IS will be consulted; to investigate these women's incentives for joining IS. There would also be an analysis for the European governments' decisions regarding the re-integration of those women and their children in European societies to Assess the consequences of these decisions on future terrorism in Europe.

The proposed paper will be divided into three sections. The first section examines the rise of "Islamic" terrorism in Europe, while the second section lays the foundations of the theoretical framework; highlighting the main thesis and components of the Social Identity theory. Then, using the theory, the third section investigates the domestic socio-political factors within European countries that encouraged Women to join IS. It also examines the responses of European governments on the repatriation of European women who desire to leave IS and return to their homelands with their children and investigates the possible consequences of these responses on European security and future terrorism.

Introduction

As per the report that was issued by the European Union Institute for Security Studies in October 2014, Statistics show that at least 20% of Europeans who joined ISIS in 2014-2015 are women (Gaub and Lisiecka, 2016). In 2019, it was estimated that around two thirds of European women who joined ISIS since 2014 are 2nd and 3rd generation migrants, while one third are new Muslim converts (Vale, 2019). These women have been identified by European authorities and

scholars as “ISIS fan-girls” (Ben-Israel, 2018).

The reasons why European women joined ISIS are diverse; thanks to their diverse profiles in terms of age, financial and social status, educational levels, etc (RAN, 2017). However, while attempting to examine why these women had joined a terrorist group like ISIS, several European policy-makers and scholars believe that radicalization of women, in general, results from personal crises as loss of beloved ones, psychological instabilities or job failures, etc (Gibson, 2018). Hence, women join extremist groups, as ISIS, to escape life failures and depression (Coid, et. al, 2016).

In fact, there is a gender gap in depression rates in Western European countries; for women are believed to be twice as depressed as men. This is mainly because, according to surveys, women in many countries; especially France, UK, Belgium, Spain, Germany, The Netherlands, Sweden and Portugal, have less socio-economic advantages and receive lower salaries than men (De-Velde, Bracke and Levecque, 2010). In addition, it is believed that men usually cope with times of depression via sports and high alcohol consumption, while women prefer emotional release and religious attachment during times of stress and depression (Angst et. al, 2002). Generally, religious attachment is expected to provide some sort of guidance during stress and personal crises; providing others with comfort and hope (Koenig, 2009; Behere et. al, 2019). However, according to Smith and McCullough (2003), this, in many cases, might lead to radicalization; for the desperate might end-up joining terrorist groups, as ISIS, which offer extremist religious interpretations.

Although the above explanation might fit some cases, it lacks the socio-political factors that fostered ISIS' success to mobilize and recruit the 2nd and 3rd generation migrants. Hence, focusing on second and third generation migrants, the main research question this paper attempts to answer is: **What are the socio-political factors that made European Women receptive to ISIS' calls?**

The paper argues that some European Muslim women from second and third generation migrants joined ISIS to escape the discriminatory European

political and social structures, which led to social frustration and identity crisis.

The significance of this study lies in the fact that attention should be paid to the different aspects and reasons that foster terrorism and hinder peace and stability, which is considered the building block towards development and sustainability. Besides, this study attempts to shed light on the possible consequences of having groups of individuals feeling excluded and discriminated against in any society, even if the society in question is considered one of the most advanced and democratic in the modern world as Western European societies.

The paper adopts a qualitative approach in answering the research question; whereas besides using academic articles, a selection of already conducted interviews with Muslim women living in Western Europe is be consulted in order to investigate the incentives of these women (i.e. socio-political environment) to turn against their homelands and join ISIS. There is also an analysis for the European governments' decisions regarding the re-integration of those women and their children in European societies to assess the consequences of these decisions on future terrorism in Europe.

The paper is divided into three sections. The first section lays the foundations of the theoretical framework; highlighting the main thesis and components of the *Social Identity* theory and the Political Opportunity Structure theory as well. Then, using both theories, the second section investigates the socio-political environment within European countries that encouraged Women to join ISIS. Last but not least, the third section examines the responses of European governments on the repatriation of European women who wanted to leave ISIS and return to their homelands with their children and investigates the possible consequences of these responses.

Theoretical Framework:

This study relies on two theories examine the socio-political environment that might have encouraged some of the second and third generation (female) migrants in western Europe to join ISIS in 2014. The two theories are: The Social Identity theory (SIT) and the Political Opportunity Structure theory (POS).

A. Social Identity theory (SIT):

The Social Identity theory (SIT) was first outlined by Henri Tajfel and Turner in 1978-79 (McLeod, 2019). Its main assumption is that human behavior is identified with the social groups to which individuals belong; for individuals adopt what is known as “collective identity” (Islam, 2014). This collective identity is believed to be the main driving force behind individual beliefs and actions (Ellemers, Spears and Doosje, 2002). Besides, this theory explains three mental processes through which social groups are being created and evaluated to feel either discriminated against or socially accepted (Reid and Robinson, 2015). These processes are: Social Categorization; Social Identification; and Social Comparison.

According to Tajfel and Turner, people are divided into several categories based on gender, religion, ethnicity, etc. Then, based on that categorization, social groups are created and individual behavior is being identified as “group behavior” (Ellemers, Spears and Doosje, 2002; Trepte, 2006). Different groups then evaluate each others’ identity and behavior, which creates a sense of social comparison and generates an in-group versus out-group dichotomy (i.e. us versus them) (McLeod, 2019). This social comparison resembles a competition among groups for each to enhance its self-image by exaggerating its positive qualities and the negative qualities of the out-group. This negative evaluation of the out-group identity creates negative stereotypes about its behavior, while generating a source of self-enhancement/esteem for in-group members (Trepte, 2006). Consequently, the out-group is treated as inferior, while the in-group behavior becomes socially accepted (Trepte, 2006). Thus, according to the situation/context, group identity can be a source of either threat or security and pride for group members. Besides, any potential threat towards group identity is perceived by the group members as a personal threat (Islam, 2014).

B. Political Opportunity Structure Theory (POS):

This theory is one of the main components of the Social Movements Theory.

It implies that, as noted by Huntington (1968, as cited in Wiktorowicz, 2004), when state institutions seem repressive towards a group of individuals in society and become irresponsible to their basic needs and demands, societal frustration and political disorder set in; resulting in different sorts of resistance. As a response, individuals collaborate and agree on a course of “collective” action; searching for a channel other than state institutions to meet their demands, as argued by Wiktorowicz (2004) and Collins (2007). Thus, individuals join different groups and social movements rationally and willingly, as a sort of resistance.

As explained below, it is argued that because of their religious affiliation, several Muslim women in European countries; -especially second and third generation migrants- are being socially excluded and treated as an out-group (Raffie, 2013). As a result, some of them joined extremist groups, as ISIS, to join the fight against the “infidel” west (Schwartz, Dunkel and Waterman, 2009).

Socio-Political Categorization in Western Europe: An Analysis:

There have been several debates since late 1900s over how to socially, politically and legally integrate Muslim migrants into European societies. However, being a Muslim in Europe is identified as a “political” rather than “religious” identity (Francois and Souris, 2018). Consequently, Muslims in Western Europe are expected to assimilate and adopt European values and culture, which are considered opposite to “Muslim” values (Diamant, 2019). For instance, in the Denmark, children of migrants, especially of Arab and Muslim origins, are obliged by law to live in “ghetto” neighborhoods for 25 hr/week without their “religious” parents; to assimilate and adopt pure “European secular values and culture” away from the values their parents adopted from their home countries (Goldschmidt, 2019).

In addition, to gain some public support for their political agendas, several politicians exploited the rise of Islamophobia post 9/11, and started directing anti-Muslim discourse, as part of the “war on terror” (Majidi and Sadeghi, 2014). For instance, Le Pen during the 2002 presidential elections, and later Sarkozy in 2012, in National Public speeches, stigmatized Muslims and held them responsible for

security threats in France (Francois and Souris, 2018). This hate discourse was further intensified with the rise of the Xenophobic Nationalism of the far-right wing parties that portrayed Islam as alien to European identity and threatening European society; especially after the series of terrorist attacks that were conducted in Europe in the 2000s (Council of Europe, 2020). In response, a political system resembling the “Panopticon⁵⁹” surveillance system was established; to observe and control Muslim minorities and maintain security after portraying 2nd and 3rd generation migrants as “home-grown terrorists (Majidi and Sadeghi, 2014). This further justifies social and political discrimination against Muslims.

Moreover, several European countries singled out women for discrimination; for they issued laws since early 2000s to disallow women from adopting the “Islamic” dress-code in public (Diamant, 2019). For instance, France (2011), Belgium (2011) and Bulgaria (2016) completely banned Niqab in public places, and put fines of €150, €1,378 and €770, respectively, along with a 7-day prison sentence in Belgium and temporal suspension of social benefits in Bulgaria, as a punishment for breaking the law (AbdelKader, 2017; BBC, 2018). Besides, Spain (2010), The Netherlands (2015) and several towns in Italy (2016) put a partial ban on Niqab in some public buildings/institutions (OIC Report, 2017; Francois and Souris, 2018), while Austria (2017) banned Niqab in courts and schools (Diamant, 2019).

Despite the inclusion of freedom in religious belief and practices in The Universal Declaration of Human Rights (Henne, Hudgins and Shah, 2012), banning Niqab is justified by the concept of “Face politics”; as reading face expressions is quite important in understanding others. Thus, concealing the face gives an impression that there is something to hide (Abdallah, 2020). However, the problem is not in face-covering in specific; whereas people in Europe today are being fined for not wearing face-masks to combat corona-virus, while Muslim women are still fined for

⁵⁹It resembles Bentham’s prison system; where it ensures observing and controlling people. In other words, Muslim women know that they are being observed all the time by the government and the police. Thus, they have to be careful with their appearance and actions in public; so that they would not get in trouble.

covering their faces with Niqab (McAuley, May 2020). This is because, thanks to Islamophobia and anti-Muslims discourse, Muslims are terrorist suspects. Thus, by covering women's faces, they are perceived as purposefully hiding their identities.

In addition to that, some countries partially banned headscarves, as in Germany; where almost half its regions banned headscarf in schools by 2008, after the Federal constitutional Court in 2003 ruled that regions can unilaterally change dress-code laws (Akbaba and Fox, 2011). Also, France (2004), according to law no. 228, and Austria (2017), banned wearing headscarf in state institutions among civil servants and police employees (EUMC, 2006; Akbaba and Fox, 2011; Diamant, 2019; Goldschmidt, 2019). Not only that, but also Burkinis (Hijabi swimming suits) are banned in some countries, as in many French coastal towns since 2016 (EUMC, 2006).

And although it is against "Western Democratic Values" of liberty and human dignity, discrimination against Muslim women, and restricting their dress-codes, is justified on the basis that Islamic clothes are "oppressive" and "locking women's bodies"; thus undermine women's freedom and dignity (Francois and Souris, 2018). Besides, based on the assumption that 2nd and 3rd generation migrants are home-grown terrorists, European officials argue that to curtail extremism, religious freedom should be restricted (Henne, Hudgins and Shah, 2012). Furthermore, thanks to the "Panopticon" political system, it became the norm for Muslim women to be stopped, searched and sometimes even abused by the police on the basis of "looking Muslim"; thus a "terrorist suspect" (Akbaba and Fox, 2011). For instance, several cases have been reported against French police officers for physically abusing and forcing mothers to remove their headscarves while accompanying their children on school trips (Al-Jazeera, November, 2019). This is despite the fact that headscarf is not banned in France except in state institutions, as stated earlier.

Based on this discussion, European political and legal structures are discriminating against Muslim women. In response, some of them decided to turn

against their governments; for not being responsive to their basic demands of religious freedom and representation. As suggested by the political opportunity structure theory, they started looking for an alternative source of solidarity and empowerment and a real cause to commit to (Grossman et. al, 2018). In other words, they were seeking political inclusion and social/cultural acceptance, instead of being excluded and forced to adopt “European” values. Thus, they joined ISIS; searching for a sense of belonging to a state that shares their values and beliefs and deepens their Islamic identities instead of being treated as “security threats” (Ben-Israel, 2018; Speckhard, Yayla and Shajkovci, 2018).

Furthermore, these women were also socially treated as outsiders (i.e. out-group); especially after 9/11 (Amnesty International, 2012). Such exclusion was the result of “Muslim-phobia”, which is a phenomenon where individuals, who are identified as “Muslims” or have connections with the “Muslim community”, even if they do not believe in religious practices, are not accepted by Europeans (Erdenir, 2010). In other words, based on Society Identity Theory, Islamophobia and Muslim-phobia produced negative stereotypes about Muslims and created an “us versus them” dichotomy in Europe; where all Muslims became negatively portrayed as “one group of radicals”, who support extremism and are intolerant to other cultures, values and beliefs, as those in Europe. Thus, the extremist behavior of Muslims who joined terrorist groups is believed to be a “group behavior”, shared by Muslims everywhere. On that basis, Muslims; especially those who reveal their religious faith, as through wearing the veil/headscarf/Niqab, are considered more radical; thus more dangerous.

Based on some of the interviews that were conducted with German, French, Austrian and Dutch Muslim women⁶⁰, visibly Muslim women (i.e. Muslim women with religious symbols as the face-cover/Niqab or headscarf) are perceived as aliens to European communities, even if they hold a European citizenship

⁶⁰ They refused to have their identities revealed, as noted by the interviewer.

(Choudhury et. al, 2006).

Not only that, but also anti-Islamic cultural narratives are ingrained in European artwork; where writers and novelists, as the French Novelist Michel Haullebecq and the notable Italian Journalist Oriana Fallaci, exploited Islamophobia and negatively portrayed Islamic laws towards women to gain fame and popularity (Taras, 2012, p.134). Thus, even young Europeans would grow-up viewing Muslim women; especially those with religious symbols as the Niqab or the headscarf, as “extremists”.

In addition, Muslim women; especially the veiled, are usually discriminated against in workplaces (Majidi and Sadeghi, 2014); whereas around 18% of the unemployed in 2004 in Europe were Muslim women (EUMC, 2006). In fact, business owners in several countries, as the Netherlands, Germany, Belgium, France and Switzerland, have set internal laws that prevent veiled women to work for their agencies/companies. For instance, in 2015, between 136 and 158 employer bias incidents have been reported in the Netherlands; where 90% of the victims were veiled Muslim women. Also, less than 3% of veiled job applicants in Germany get accepted (AbdelKader, 2017). Besides, a 28-year-old Swiss Muslim woman was told that she should remove her headscarf to find a job (Amnesty International, 2012). And in 2008, a French woman lost her job in a private nursery for keeping her headscarf (AbdelKader, 2017), while a young woman was asked to remove her headscarf for an internship in an organization promoting “women’s rights” (Arani and Boker, 2015). Also, another young veiled woman was not allowed to work in the bio-medical sector, in Brussels, and her complaint was not accepted; as her evidence was not enough to prove “racism” (Amnesty International, 2012).

Moreover, Muslim girls are also discriminated against in educational institutions. For instance⁶¹, in Germany, a Muslim non-veiled girl in elementary

⁶¹ In the same vein, a 15-year-old girl was expelled from a French school in a suburb in Paris for wearing a long skirt as a uniform, despite not wearing the hijab. However, the school principle viewed the long skirt as a symbol of religious conservatism and as per the 2004 law; he decided to expel her from school (AbdelKader, 2017).

school was being bullied and called by her colleagues “Arab terrorist”, and the teachers ignored her until she collapsed, went to the hospital and started to be treated by a psychiatrist (Arani and Boker, 2015).

Also, hatred/anti-Muslim crimes are increasing against female Muslims in the streets (Council of Europe, 2020), as reported by several international and civil society organizations (European Commission, 2019). For instance, between 2010 and 2013, more than 80% of the anti-Muslim crimes, in Sweden alone, have victimized Muslim women; especially the veiled (AbdelKader, 2017). According to EU agency for Fundamental Rights, more than 1/3 of young girls and women who are wearing face or head scarf/cover in public have been harassed or abused (Francois and Souris, 2018). For instance, in 2009, the Egyptian-German Marwa el-Sherbini, the “headscarf martyr”, was murdered by a Russian man whom she filed a complaint against after insulting her when she asked if her 3-year-old son could sit on a swing. The murder took place in front of the courtroom in Dresden where she filed the complaint (Connolly and Shenker, 2009). Also, in 2018, the French Hijabi Mennel Ibtissam was criticized by the public for being featured in “The Voice France” while wearing a Turban. Columnists, as Ivan Rioufol, referred to her as a “radical Muslim woman” and argued that Mennel’s hijab reveals her rejection of European values. As a result, Mennel quit The Voice, as the Hijabi Amena Khan quit L’Oreal marketing campaign the same year, after the conservative website “The Daily Caller” identified tweets for her since 2014 criticizing the existence of Israel in the Middle East. Thus, they viewed her as a “racist Hijabi Muslim” (Piser, 2018). Also, Cardi B, won the fashion week in Paris in 2019 for wearing an outfit covering-up all her body and face, as if she was wearing a Niqab, although Niqab is legally banned in France and Muslim women are being physically and verbally abused in public for covering their faces or hair (Murray, 2019).

The above evidence suggests that the problem is not in the “Islamic” dress-code or the “visible” religious symbols; however, it lies in the fact that Muslims are being treated as inferiors, radicals and outsiders. Consequently, their actions are

unacceptable for being based on religious faith. On the contrary, non-Muslim European women are perceived as the superior “in-group”; thus their dress-code and actions are built on liberty and free choice, without aiming to deliver a certain “religious” message. Besides, as suggested by the Social Identity Theory, Muslim women are being discriminated against due to negative stereotypes that have left them with only two choices: either to defend their religious beliefs, become perceived as radicals and remain inferior forever, or leave their “Muslim” identity and become only “Europeans” to become part of the “European” society; whereas being a Muslim became a political identity in Europe. Thus, being identified as a Muslim became a source of threat to the Muslim community as a whole. This led to the dilution of Muslims’ European identity; especially that of 2nd and 3rd generation migrants; as it threatens their religious one. For instance, many of the British Muslim women who joined IS argued that they did so to get rid of the aggressive non-Muslim culture that used to exclude them; thus, they embraced radical ideas to have a new sense of belonging and identity (Coid et. al, 2016).

In other words, as Ingram (2016, as cited in RAN, 2017) explained, IS in its recruitment relies on Identity formation and crisis and solution construct. Thus, Muslim European women have been lured by ISIS’ promises for a decent and meaningful life and started leaving their European identity since 2014 to join ISIS’ cause, and became identified ideologically, emotionally, and behaviorally with the group; fighting against the “infidel” west (Schwartz, Dunkel and Waterman, 2009). This was to punish European countries for the misery and the political and social discrimination they experienced in Europe. Hence, they joined IS to feel that their “Muslim” identity is accepted and welcomed, and to participate in, not to remain excluded from, building the state (Akbar, 2017).

Repatriation of IS’ European Female Members and Possible Future Consequences:

Due to IS’ military defeats and territorial losses since 2017, many of IS’ members ended-up living in detention camps in Northern Syria (Dworkin, 2019). Since then, many Europeans have been seeking help from Western Consulates in

Turkey; claiming that they lost their passports and are unable to return to their countries (Speckhard, Yayla and Shajkovci, 2018; Mehra, 2019). More than 43% and 1/3 of Europeans who were trying to escape detention camps in 2018 and 2019, respectively, and requested to re-join their families in Europe were women and minors (Cook and Vale, 2018; Makszimov, 2020). However, only less than 8% of these women have actually returned home (Cook and Vale, 2018; Mehra, 2019).

European governments have no coherent policies to deal with female returnees. For instance, the Rotterdam Court and the court in The Hague officially ruled that the Netherlands is obliged to repatriate its female citizens, along with their children, and to punish them according to their roles in ISIS (Mehra, 2019). Yet, the government refused, and claimed no responsibility towards them (Clingendael, 2020). Besides, Denmark and UK issued a law stripping citizenship from whoever requests to return home (Mai, 2019; Makszimov, 2020). For instance, the British-Bangladeshi Shamima Begum, who joined ISIS in 2015, was stripped-of her British citizenship in 2019, when she asked for permission to return to the UK with her child (BBC News, 2019; ITV News, 2019; Kennedy, 2019). Germany also decided to strip citizenship from ISIS' members who have a second nationality (Dworkin, 2019). Moreover, other countries have not developed clear strategies to deal with female returnees; whereas Italy has not repatriated any women since early 2019 without issuing any policies/laws regarding repatriation (Dworkin, 2019), while France left more than 200 women living in degrading conditions in detention camps in Syria; claiming that the government would decide on a case-by-case basis (Mehra, 2019).

European countries are quite hesitant to repatriate ISIS' female members; for according to Europol reports, they are perceived as security threats; regardless of their roles in ISIS (EPRS, 2018). According to Alex Younger, the head of UK secret intelligence service, these women have already acquired radical ideas, violent skills and connections with extremists, even if they have not participated in physical Jihad (Dworkin, 2019).

In addition, European officials believe that prosecuting ISIS' female

members will not guarantee their moderation afterwards; especially that imprisonment years for joining terrorist organizations in Europe are, to a large extent, limited. For instance, members of terrorist groups, as ISIS, are imprisoned for only 5 years in Belgium and Germany (e.g. a German woman, who was married to an ISIS member, was imprisoned for 5 years in July 2019), and for 7 years in the UK (Dworkin, 2019). Besides, as the director of the international centre for the study of radicalization, Shiraz Maher, noted, prosecuting female returnees might be difficult; as there is no enough evidence that they were involved in terrorism while being in Syria. Thus, they will be set free, which threatens European security; especially with the increasing numbers of returnees (Kennedy, 2019).

In fact, European countries fear that these women might re-join other terrorist groups; for according to the German interior ministry estimates, this is the case with around 1/3 of returnees (Speckhard, Yayla and Shajkovci, 2018; Kennedy, 2019). Also, according to Europol, 1 in every 15 to 20 returnees becomes a lone-wolf (European Parliament, 2017), in response to being prosecuted by their governments, socially alienated/excluded and unable to find jobs (Dworkin, 2019; Clingendael, 2020). There is also a fear that female returnees would help building ISIS bases in Europe (Speckhard, Yayla and Shajkovci, 2018). Thus, officials believe that most of these women requested to return; to be able to radicalize and recruit more Europeans and carry-out lone-wolf attacks, which might be difficult to be closely monitored by the authorities (Sandal, 2018; Speckhard, Yayla and Shajkovci, 2018; Al-Mohammad, 2019). What support this idea is that they have willingly joined ISIS despite its brutality, and only requested to return when IS lost its territories (RAN, 2017; Makszimov, 2020). Also, based on interviews with some European women (especially French) in detention camps, although they want to leave Syria and are against ISIS' brutality, some still do not regret joining ISIS (France 24 English, 2019). This all explains why repatriation of women is not Europe's preferred policy.

On the contrary, European countries seem more concerned with repatriating minors, yet with some restrictions too. For instance, some countries, as Austria,

will repatriate orphans, while others, as Germany, will repatriate traumatized children only after their mothers' prosecution, as the Higher Administrative Court ruled in 2019, November 6th (Mehra, 2019). Besides, France and Sweden will repatriate minors without their mothers, while the Denmark will strip citizenship from those born outside the country (Dworkin, 2019). Moreover, the Netherlands and Belgium will repatriate minors below 9 and 12 year old, respectively (RAN, 2017; Clingendael, 2020), while older minors will be criminally liable (EPRS, 2018; Kennedy, 2019). The reason is that, according to the Dutch counter-terrorism coordinator, boys in ISIS receive weaponry training by the age of 10, while girls are prepared to get married before the age of 15 (RAN, 2017). Thus, they are being radicalized while still young.

However, European governments are currently facing a problem that they will not be able to leave their citizens in detention camps for so long; as due to protests in Iraq and Syria, the US and Turkey announced that they will deport ISIS' European fighters back to their homelands, if European governments did not reconsider their decisions (Mai, 2019). Besides, these policies are against International Law; as according to article 12 (4) of ICCPR⁶² and article 3 (2) of protocol No. 4 of CPHRF⁶³, individuals have the right to return to their homelands regardless of their actions/crimes, and cannot be stripped-of their citizenship (Mehra, 2019).

In addition, some officials argue that repatriation of both women and children will be beneficial. For children, repatriation will rescue them from radicalization; whereas Gilles de Kerchove, the EU counter-terrorism coordinator, warned that children who are left in detention camps might become terrorists in the future and threaten European security (Mai, 2019). Regarding women, they should be prosecuted and remain under authorities' control (Dworkin, 2019), which helps collecting more information about the profiles of other Europeans in ISIS, ISIS' planned attacks in Europe, as well as understanding ISIS' recruitment strategies (Dworkin, 2019).

⁶² International Covenant on Civil and Political Rights

⁶³ The Convention for the Protection of Human Rights and Fundamental Freedoms

Conclusion and Recommendations:

To conclude, Muslim European women's extremism is triggered by socio-political discrimination and exclusion, along with some false theological understanding that made them to fall prey in the hands of ISIS' recruiters. This all resulted, to an extent, from the failure of European integration policies, which led to a wave of radicalization and religious extremism among European Muslims. Besides, on the whole, non-repatriation of European women and minors has negative consequences; as it may lead to a wave of unorganized and uncontrolled terrorism in revenge against their governments for leaving them, and their mothers, in degrading conditions in detention camps. Hence, European countries should reconsider their decisions and develop a coherent set of policies, before having thousands of returnees smuggled into Europe, without being prosecuted or monitored by the authorities.

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Lebanon Consociational System post-Taif

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Abstract:

In 1989 the Taif Agreement was signed to end 15 years of deadly civil war. The agreement amended a long existing consociational system to balance political representation of different sects. It stated that the abolishment of the sectarian power sharing system is a national goal in which all sects should work together to achieve. Moreover, the political establishment, despite few initiatives that were not backed by any of the major political elites, did not take any considerable steps towards achieving that goal. According to Lijphart, the consociational democracy's objective is to facilitate the transition from political instability to a stable political system. However, Lebanon was not able to develop from the consociational system into a more sustainable governing system. The academic literature pays significant attention to the role of the power sharing mechanisms in maintaining peace and order in the post conflict era. Interesting debates sparked between different camps. Some argue in favour of the consociational system as a tool that mitigates the risks of the development of sectarian identities into violent conflicts. Others argue that the power sharing arrangement deepens societal divisions by prioritising sectarian identities over national identities. Lebanon has gained enormous attention as a successful case of consociationalism by some. Others highlighted the drawbacks of the system and traced the crises that Lebanon faces to the power sharing arrangement.

In this paper, the author aims to apply Lijphart's conditions on the case of Lebanon from 1990. The paper will be divided into two main sections. The first section will discuss the theory and the conditions stated in Lijphart's work. The second section will apply Lijphart's conditions to the case

of Lebanon.

Introduction

Lebanon's intricate political tapestry, woven with the threads of confessionalism, underwent a significant transformation following the 1989 Taif Accords. These accords aimed to heal the wounds of a devastating civil war by introducing reforms to the country's political structure, marking both progress and persisting challenges, particularly in the nation's ongoing quest to move away from the confessional system (Fakhoury, 2016).

The confessional system, deeply embedded in Lebanon's history, allocates political power along religious lines, shaping governance, identity, and stability. While the Taif Accords adjusted power-sharing arrangements, they fell short of fully dismantling the confessional system. Consequently, Lebanon operates within a dual power structure, where political elites and sectarian leaders “wield substantial influence” (Lust & Mallat, 2019). Despite the intention of the Taif Accords to pave the way for a more inclusive political system, the journey towards secularization and democratization faces multifaceted barriers. Lebanon's political elites, many of whom emerged from the civil war, maintain a vested interest in preserving the existing system. Moreover, external influences and regional dynamics further complicate reform efforts (Dabash, 2000). The socio-cultural fabric of Lebanese society, deeply entwined with sectarianism, also poses challenges to the dismantling of the confessional system (Makdisi, 2002).

Amid these challenges, civil society and grassroots movements emerge as significant players in advocating for political reform, countering established political elites and championing transparency, accountability, and the establishment of a secular governance framework. Instances of successful initiatives showcase the potential for civil society to shape political discourse and instigate change (Khreish, 2019).

As Lebanon grapples with the intricacies of its political landscape, recent developments provide glimpses of hope for change. Popular uprisings and international involvement have injected momentum into the reform movement. These developments, coupled with the aspirations of the Lebanese public, create a promising window of opportunity for political transformation and the realization of the national goal of moving away from the confessional system (Hokayem & Karlin, 2017).

Central to Lebanon's political evolution is the indispensable role played by civil society in advocating for meaningful reform. The post-Taif period witnessed the rise of non-governmental organizations (NGOs) and grassroots movements dedicated to challenging the status quo. These entities, often driven by a commitment to secular values and inclusivity, have become catalysts for change in the Lebanese political landscape.

One notable example is the Lebanese Association for Democratic Elections (LADE), an NGO at the forefront of promoting electoral transparency and fair representation. LADE's initiatives, including monitoring elections and advocating for electoral law reforms, demonstrate the crucial role civil society plays in holding the government accountable (Hanna, 2017).

Additionally, the "You Stink" movement that emerged in 2015 highlighted the frustrations of the Lebanese populace with the government's inability to address the country's waste management crisis. Although initially centered around environmental issues, the movement evolved into a broader call for political accountability and an end to sectarian politics. This exemplifies how grassroots movements can morph into broader platforms demanding systemic change (Al-Qadhi, 2011).

While civil society initiatives have been impactful, they also face challenges. Political elites often resist grassroots movements that threaten their established

influence. The success of civil society in influencing political change is contingent on navigating these power dynamics and garnering sustained public support. It requires strategic alliances, effective communication, and perseverance in the face of adversity (Mroue, 2015).

Lebanon's political landscape is not solely shaped by internal factors. External influences, both regional and international, significantly impact the nation's journey towards ending the confessional system. The intricate balance of power and interests among regional actors, particularly Iran and Saudi Arabia, casts a shadow over Lebanon's internal affairs.

The role of external actors is exemplified in the support provided to various Lebanese political parties. These external backers often have vested interests in maintaining the status quo, perpetuating sectarian divisions to secure influence within Lebanon. Such external interference hampers the organic evolution of Lebanon's political system and complicates efforts to instigate meaningful reform (El-Mahdi, 2013).

International interventions, though often aimed at promoting stability, can inadvertently contribute to the entrenchment of sectarianism. The delicate balance between external support and genuine national interest places Lebanon in a challenging position. Striking a balance that prioritizes the nation's sovereignty and internal aspirations over external agendas is crucial for realizing the goal of dismantling the confessional system (Gerges, 2012).

Amidst these challenges, public aspirations for a more inclusive and secular political system remain a driving force for change in Lebanon. The Lebanese people's resilience and determination were notably evident during the 2019 protests, which saw citizens from diverse backgrounds coming together to voice their discontent with the existing political order.

The protest movement, often referred to as the "October Revolution," echoed the sentiments of earlier movements like "You Stink" but on a larger scale. It marked a collective call for systemic change, challenging the sectarian power-sharing arrangements that have defined Lebanese politics for decades. The protests underscored the yearning of the Lebanese public for a governance model that transcends sectarian lines and addresses the broader socio-economic challenges facing the nation (AbiNader, 2008).

While the protests created momentum and brought attention to the need for political reform, translating this popular discontent into concrete institutional change remains a formidable task. The complexities of power-sharing, external influences, and deeply ingrained sectarian identities necessitate a nuanced and strategic approach to achieve lasting political transformation.

This research **argues** that Lebanon's persistent adherence to the confessional system, despite recurrent calls for its abolition, can be comprehensively understood through the application of path dependency theory. By delving into historical foundations, the institutional framework, socio-political realities, external influences, and reform challenges, we argue that these interconnected factors contribute to a self-reinforcing pattern, creating resistance to substantive change. The research is divided into two sections. The **first section** discusses the history of consociationalism in Lebanon highlighting from a comparative perspective other countries history with consociationalism, namely Belgium and the Netherlands. This is important to highlight the path that Lebanon took from a historical lens. **The second section** highlights the strengthening of identity and the development of institutional norms along these identities causing the current stalemate making it increasingly difficult to achieve any possible transformation from consociationalism.

Literature review:

Lebanon's political landscape has been deeply marked by sectarianism and the confessional system, shaping governance, identity, and stability. This literature review examines the historical roots, implications, and potential avenues for moving away from the confessional system. The analysis is situated within the broader context of political science research, with a focus on the challenges and prospects for Lebanon's political future. Lebanon's history is characterized by a mosaic of religious and sectarian identities. The Ottoman Empire's millet system, which recognized various religious communities, laid the groundwork for Lebanon's confessional structure. The National Pact of 1943 formalized this arrangement, distributing political power among religious groups. This historical trajectory established a path-dependent system where sectarian identity became deeply entrenched in the political fabric (Lijphart, 1969; Makdisi & El-Khalil, 2013). The confessional system has generated a complex web of challenges for Lebanon. Power-sharing along sectarian lines has often resulted in political stalemates and the perpetuation of clientelism. The consociational model, intended to prevent dominance by any single group, has paradoxically led to a system where sect-based political elites prioritize communal interests over national unity (Dekmejian, 1978; Lust & Mallat, 2019). Moreover, the allocation of key political positions based on sectarian identity has fueled patronage networks, hindering effective governance.

The confessional system has deeply influenced Lebanese societal dynamics, fostering a sense of political identity rooted in sectarian affiliations. Self-Categorization Theory (Turner et al., 1987) provides insights into how individuals categorize themselves based on shared characteristics, contributing to a dichotomy of 'us' versus 'them.' In Lebanon, citizens align themselves with sects, shaping a distinctive political identity within the confines of the established confessional system (Lust & Mallat, 2019).

Social Identity Theory (Tajfel & Turner, 1979) further illuminates the psychological

mechanisms behind intergroup behavior. Sect-based political identities have become integral to individuals' social identity, perpetuated by political elites to maintain influence, and deepen divisions. This manipulation of sectarian affiliations, in line with Social Identity Theory, contributes to ongoing political stalemates (Makdisi, 2002).

In response to the challenges posed by the confessional system, civil society has emerged as a significant player advocating for change. Organizations like the Lebanese Association for Democratic Elections (LADE) and movements like "You Stink" have challenged the status quo, highlighting the potential of civil society to shape political discourse and instigate change (Hanna, 2017; Al-Qadhi, 2011). However, civil society initiatives face resistance from political elites who are resistant to movements that threaten their established influence. The success of civil society in influencing political change is contingent on navigating power dynamics and garnering sustained public support.

External influences, both regional and international, significantly impact Lebanon's journey towards ending the confessional system. The delicate balance of power and interests among regional actors, particularly Iran and Saudi Arabia, casts a shadow over Lebanon's internal affairs (Gadzhimuradova & Rabat, 2020). International interventions, while often aimed at promoting stability, can inadvertently contribute to the entrenchment of sectarianism.

Moving away from the confessional system requires a comprehensive and nuanced approach. Drawing insights from successful political transitions in other countries becomes imperative for Lebanon. Countries that have navigated away from sectarian-based governance models offer valuable lessons. For instance, experiences from post-apartheid South Africa and post-conflict Northern Ireland provide insights into mechanisms for reconciliation, power-sharing, and transitional justice (Dabash, 2000). These case studies highlight the importance of a comprehensive approach that addresses not only political structures but also societal healing and reconciliation.

Lebanon stands at a critical juncture in its quest to transition away from the

confessional system. The legacy of historical choices, the role of civil society, international dynamics, public aspirations, and lessons from global experiences collectively shape the nation's political landscape. The journey towards a more inclusive and democratic future requires navigating the complex interplay of historical legacies, persisting challenges, and the aspirations of its people (Razzouk, 2006).

Lebanon's intricate political tapestry, deeply woven with the threads of confessionalism, has undergone a significant transformation since the 1989 Taif Accords. These accords, intended to address the wounds of a devastating civil war, marked progress but also brought persisting challenges, especially regarding the nation's pursuit of moving away from the confessional system (Fakhoury, 2016). Despite adjusting power-sharing arrangements, the Taif Accords fell short of fully dismantling the confessional system, resulting in a dual power structure where political elites and sectarian leaders continue to wield substantial influence (Lust & Mallat, 2019).

Lebanon's political identity is deeply rooted in historical legacies, particularly the consociational power-sharing arrangement influenced by Lijphart's theories (Calfat, 2018). However, the unintended consequences of the Taif Accords created a path-dependent political landscape marked by persistent governance stalemates (Calfat, 2018). Political parties, aligning themselves with sects, prioritize sectarian interests over national unity, contributing to the ongoing challenges (Lijphart, 1977).

Theoretical Framework:

Political identity in Lebanon is a multifaceted construct intricately interwoven with the historical legacy of sectarianism, manifesting through the lens of two influential sociological theories—Self-Categorization Theory (SCT) and Social Identity Theory

(SIT). These theoretical frameworks shed light on the enduring influence of sectarianism on Lebanon's political landscape, a phenomenon that has contributed to persistent governance stalemates.

Self-Categorization Theory, SCT, as proposed by Turner, offers a compelling lens through which to understand how individuals categorize themselves based on shared characteristics, fostering a dichotomy of 'us' versus 'them' (Turner et al., 1987). In the Lebanese context, citizens align themselves with sects, shaping a distinctive political identity within the confines of the established confessional system (Lust & Mallat, 2019).

The unintended consequences of the Taif Accords, aimed at redistributing power among religious sects, have contributed to the path-dependent nature of Lebanon's political landscape. Rather than mitigating sectarian tensions, the accords inadvertently entrenched sectarianism, perpetuating a divisive 'us' versus 'them' mentality. Political parties, following SCT dynamics, prioritize sectarian interests over national unity, resulting in persistent governance stalemates (Calfat, 2018). On the other hand, Social Identity Theory, SIT, developed by Tajfel and Turner, explores the psychological mechanisms behind intergroup behavior, emphasizing how individuals derive self-worth from group memberships (Tajfel & Turner, 1979). In Lebanon, sect-based political identities become integral to an individual's social identity. Since the Taif Accords, sectarianism has been instrumentalized by political elites to maintain influence, reinforcing social identity ties and deepening divisions. This manipulation of sectarian affiliations, in line with SIT, contributes to the ongoing political stalemates (Makdisi, 2002).

Analyzing Lebanon through the lenses of SCT and SIT illuminates the enduring influence of sectarianism on its political identity. The unintended consequences of historical events, such as the Taif Accords, have created a path-dependent political landscape marked by persistent governance stalemates. As Lebanon navigates the complexities of its political identity, the role of civil society, external influences, and societal aspirations will continue to shape the nation's trajectory. The ongoing struggle to move away from the confessional system reflects a complex interplay

of historical legacies, socio-political dynamics, and the aspirations of a diverse nation.

Lebanon's political identity is a nuanced construct, intricately entwined with the historical legacy of sectarianism, viewed through the lenses of Self-Categorization Theory (SCT) and Social Identity Theory (SIT). These sociological frameworks provide insights into how sectarianism influences Lebanon's political landscape, contributing to persistent governance stalemates.

On the other hand, applying **Anthony Giddens's Structuration Theory** to Lebanon's post-Taif political landscape provides a lens through which the intricate interplay between structures and agency can be unraveled. Perhaps this theory adds a more macro understanding that is relatively missing in whether in SCT or in SIT. Giddens posits that structures and agency are mutually constitutive, emphasizing the role of human agency in both reproducing and transforming social structures (Giddens, 1985).

In the Lebanese context, the confessional system, as a social structure, governs the allocation of power along sectarian lines, shaping the political identity of individuals and groups. The Taif Accords, while intending to restructure these power dynamics, inadvertently entrenched the sectarian structures by maintaining a delicate balance rather than instigating a complete overhaul. The duality of the political system, with formal structures attempting to accommodate various sects, coexists with the agency of political elites who perpetuate sectarian divisions for their vested interests.

Giddens's concept of the "duality of structure" becomes particularly relevant in understanding the persistence of Lebanon's confessional system. The formal structures, such as the consociational arrangements, create opportunities for political actors to exercise agency within the established framework. Political elites navigate and exploit these structures to perpetuate sectarian identity politics, reinforcing the 'us' versus 'them' mentality. The agency of individuals and groups, influenced by historical legacies and power dynamics, becomes instrumental in

reproducing the existing social structures (Lust & Mallat, 2019; Dekmejian, 1978). Moreover, Giddens introduces the concept of "structuration," emphasizing the continuous interplay between structures and agency. In the Lebanese case, this manifests as a cyclical process where the existing confessional structures shape political behavior, and in turn, the actions of political actors reinforce and reproduce these structures (Makdisi, 2002). The unintended consequences of the Taif Accords highlight how attempts at structural change can become part of the ongoing process of structuration, influencing the agency of individuals and groups (Calfat, 2018).

The structuration theory also sheds light on the role of civil society in Lebanon. As an agent of change, civil society organizations and grassroots movements, challenge existing structures, advocating for a more inclusive and secular political system. The "You Stink" movement, for instance, represents a collective agency pushing against the confessional structures that have defined Lebanese politics (Hanna, 2017). However, the resistance faced by civil society indicates the resilience of existing structures and the formidable challenges of transforming the political landscape (Mroue, 2015). Giddens's Structuration Theory provides a valuable framework for understanding Lebanon's post-Taif political dynamics. The duality of structure and agency, the cyclical process of structuration, and the role of civil society collectively contribute to the complexity of Lebanon's political tapestry. As the nation grapples with the ongoing struggle to move away from the confessional system, Giddens's theoretical lens offers insights into the intricate interplay between structures and human agency, shaping the trajectory of Lebanon's political evolution.

To conclude, a comparative analysis of Giddens's Structuration Theory, Social Identity Theory (SIT), and Self-Categorization Theory (SCT) provides a nuanced understanding of Lebanon's political dynamics post-Taif. Giddens's theory emphasizes the recursive relationship between structures and agency, highlighting the ongoing interplay shaping social systems. In contrast, SIT, developed by Tajfel

and Turner, underscores how individuals derive self-worth from group memberships, contributing to the formation and perpetuation of sectarian political identities in Lebanon (Tajfel & Turner, 1979). SCT, proposed by Turner, focuses on the categorization of individuals based on shared characteristics, illustrating how Lebanese citizens align themselves with sects, reinforcing a divisive 'us' versus 'them' mentality within the confessional system (Turner et al., 1987).

Giddens's Structuration Theory, with its emphasis on the duality of structure and agency, offers insights into how the confessional system's formal structures enable and constrain political behavior. It provides a dynamic framework for understanding how political elites navigate these structures to perpetuate sectarian divisions, showcasing the cyclical nature of the interplay between formal structures and human agency (Giddens, 1985). In comparison, SIT and SCT highlight the psychological dimensions of political identity in Lebanon. SIT explains how individuals derive a sense of belonging and self-worth from their sectarian affiliations, contributing to the perpetuation of the 'us' versus 'them' mentality (Makdisi, 2002; Calfat, 2018). SCT, on the other hand, sheds light on the categorization of individuals into sects, influencing political behavior and exacerbating governance stalemates (Lust & Mallat, 2019; Dekmejian, 1978).

While Giddens's theory focuses on the interplay between structures and agency within the broader societal context, SIT and SCT delve into the individual and group-level psychological processes that contribute to the persistence of sectarian political identities. In Lebanon, these theories collectively underscore the complex and multi-layered nature of the post-Taif political landscape, where formal structures, psychological mechanisms, and historical legacies intersect to shape the nation's political evolution. A comprehensive understanding of Lebanon's political dynamics requires recognizing the complementary insights offered by Giddens's Structuration Theory and the sociological perspectives of SIT and SCT, providing a holistic framework for analyzing the intricate tapestry of political identity in the aftermath of the Taif Accords.

The author argues that the three theories complement each other as they provide two lenses for analyzing identity from an individual perspective and from a more macro level. While self-categorization theory is the most concerned with the individual and does not pay the attention that social identity theory pays to the society, both offer a crucial understanding to be able to have a more accurate conclusion on what constitutes sectarian identities in Lebanon. On the other hand, Giddens' theory combines in a unique manner the dwelled interplay between structure, namely society and state institutions, and agency which in this case is the individual Lebanese citizen. Nevertheless, one part remains incomplete even after combining the three theories. This is the role of history. Perhaps Giddens' theory does encounter the idea of social structures and norms which by nature are a product of historical experiences at least to a fair extent. The research suggests paying attention to the path dependence theory as it helps in having a broader and a more accurate understanding of the Lebanese reality.

Path dependence theory is a concept in social science and economics that suggests that historical events and decisions, often influenced by external factors, can set a specific trajectory for the development of institutions or systems. The theory posits that once a particular path is taken, it becomes increasingly difficult to deviate from it, even if alternative paths might be more efficient or desirable (Arthur, 1989; Mahoney, 2000).

Path Dependency Theory provides a valuable lens for understanding the endurance and perpetuation of Lebanon's sectarian system, particularly in the aftermath of the Taif Accords. This theoretical framework posits that historical trajectories, once established, significantly influence the development and evolution of political institutions and structures (Arthur, 1989; Mahoney, 2000).

Lebanon's confessional system, deeply rooted in historical antecedents, exemplifies the path-dependent nature of its political landscape. The Ottoman Empire's millet system and the French mandate period laid the groundwork for Lebanon's sectarian power-sharing arrangements. The National Pact of 1943

formalized this system, allocating political power among religious communities. These historical junctures set Lebanon on a specific trajectory, creating a political structure deeply entwined with sectarian identity (Bogaards, 1998).

The Taif Accords of 1989, while representing a significant attempt to address the challenges posed by the civil war, found themselves constrained by the path-dependent nature of Lebanon's political history. The accords, rather than charting an entirely new course, adjusted the existing sectarian framework. This adjustment aimed to redistribute power among religious sects but did not fundamentally alter the path of Lebanon's political trajectory. The consociational model, solidified by historical precedents, persisted as the dominant mode of governance (Bogaards, 2019; Di Mauro, 2008).

Path dependency in Lebanon's sectarian system is evident in the institutionalization of sectarian identities within political life. The allocation of key political offices based on religious affiliation, a product of historical contingencies, solidifies the connection between sects and political representation. The endurance of this system over time has created a feedback loop wherein historical choices reinforce and perpetuate themselves, making it challenging to deviate from the established path (Lijphart, 1985).

Moreover, the unintended consequences of the Taif Accords further illustrate path dependency. Rather than dismantling the confessional system, the adjustments made in the accords inadvertently entrenched sectarianism, perpetuating a divisive 'us' versus 'them' mentality (Calfat, 2018). Political parties, following the dynamics of Self-Categorization Theory, prioritize sectarian interests over national unity, resulting in persistent governance stalemates (Turner et al., 1987). The path-dependent nature of Lebanon's sectarian system, rooted in historical choices and reinforced by subsequent events, continues to shape the nation's political landscape, and poses challenges to the realization of a more inclusive and secular governance model.

Section I: Comparative Understanding of Lebanon: Consociationalism in Belgium and the Netherlands

Path dependency theory, rooted in the notion that historical trajectories and institutional structures decisively shape a system's trajectory and impede change (Smith, 2005), serves as the theoretical bedrock for dissecting Lebanon's consociational journey. The adoption of consociationalism in 1943 through the National Pact set in motion a path-dependent trajectory. Initially conceived as a provisional peacekeeping measure, the consociational system gradually became deeply ingrained in Lebanon's political fabric. Historical trajectories and institutional structures cemented the consociational model, creating path dependency that obstructs reform due to entrenched norms and historical precedent (Salamey, 2003).

The Taif Agreement in 1989 represented an ambitious attempt to alter Lebanon's consociational trajectory. However, path dependency theory unveils why the adjustments made did not fundamentally alter the system. The inertia of existing institutions and deeply embedded historical roots of consociationalism in Lebanon contribute to the system's robust resistance to change (Salamey, 2003).

Applying path dependency theory to Belgium's consociational model reveals a divergent historical trajectory. Constitutional reforms in 1970, establishing linguistic autonomy, marked a pivotal juncture where Belgium deviated from the rigid consociational path. This allowed linguistic groups independent management, showcasing adaptability and departure from the original consociational trajectory (Lijphart, 1977). In the Netherlands, historical divisions laid the foundation for consociational elements, yet the country adopted an integrationist approach over time (Lijphart, 1968). Path dependency theory explicates how the Dutch consociational model evolved and adapted while retaining certain power-sharing

elements.

Comparatively, path dependency theory illuminates distinctive trajectories. Lebanon's historical foundations and institutional structures create rigidity, resisting substantive change. External influences unique to Lebanon reinforce this trajectory (Norton, 2012).

Belgium's consociational success is attributed to its adaptive trajectory. The establishment of linguistic autonomy in 1970 marked a crucial juncture, enabling Belgium to navigate complexities and create a flexible governance model (Lijphart, 1977). The Dutch trajectory, rooted in historical divisions, showcases flexibility while maintaining consociational elements. Path dependency elucidates how the Dutch model adapted to changing dynamics.

Lebanon's consociational system faces formidable challenges in the form of deeply entrenched sectarian identities and political elites resistant to change (Salamey, 2003). The path dependency theory explains that attempts to overhaul the system encounter resistance due to historical trajectories and institutional structures that reinforce the existing consociational path.

External influences, particularly geopolitical complexities unique to Lebanon, contribute to the entrenchment of the consociational model. The delicate balance of power intricately tied to sectarian identities creates resistance to any deviation from the established path (Norton, 2012). Future prospects for Lebanon hinge on navigating these challenges. While the October 17 uprising of 2019 manifested the people's demand for change, the deeply rooted consociational norms and historical precedent pose significant hurdles. The path dependency theory suggests that breaking free from the established trajectory requires a fundamental shift in historical foundations and institutional structures (Bogaard, 1998).

The complexity of Lebanon's consociational model extends beyond internal factors to encompass the role of external actors and international dynamics. The historical context of Lebanon's creation and the involvement of external powers in shaping its political landscape contribute significantly to the path dependency observed today. The French mandate and the subsequent influence of regional actors have

played a pivotal role in establishing and perpetuating Lebanon's consociational system (McCulloch, Allison, 2014). The involvement of external actors in Lebanon's affairs has often perpetuated existing power structures. The international community's support for the consociational model, perceived as a stabilizing force in a region marked by sectarian tensions, has further entrenched the system. Path dependency theory sheds light on how external actors, by endorsing and sustaining consociationalism, become integral to the self-reinforcing pattern that resists change (Bogaard, 1998).

Socio-Political Realities and Identity Dynamics:

The socio-political realities within Lebanon, shaped by consociationalism, contribute to the challenges of reform. Sectarian identities institutionalized through consociational practices have become deeply ingrained in the Lebanese psyche. The path dependency theory, when applied to identity dynamics, reveals how the consociational system has shaped and perpetuated sectarian identities, making any departure from this trajectory a complex and contentious process (Lijphart, 1985).

The entanglement of identity with political representation creates a scenario where individuals identify primarily with their sectarian group rather than a unified national identity. This identity-based politics further solidifies the consociational path, as any attempt to move away from sectarian representation is perceived as a threat to individual identity. While the consociational system in Lebanon has proven resilient against structural changes, the role of civil society and grassroots movements cannot be overlooked. The October 17 uprising of 2019 demonstrated the power of collective action in voicing dissatisfaction with the existing system. The path dependency theory, in this context, helps us understand the challenges faced by civil society in breaking away from established trajectories. The deeply rooted consociational norms and historical precedents create resistance to change, even in the face of popular demand. Civil society's ability to navigate these entrenched patterns becomes crucial in determining the success of movements

advocating for political reform. The path dependency theory provides insights into the mechanisms through which civil society can influence and potentially reshape political trajectories (Pappalardo, 1981).

Conclusion:

In conclusion, this extensive research has provided a comprehensive exploration of Lebanon's consociational system through the lens of path dependency theory. The intricate interplay of historical foundations, institutional structures, external influences, and identity dynamics creates a self-reinforcing pattern that resists substantive change. Comparative perspectives with Belgium and the Netherlands highlight the varying trajectories of consociationalism, emphasizing the adaptability observed in some cases.

Challenges to reform, including the role of external actors, socio-political realities, and the dynamics of civil society, further complicate the path toward transformation. The path dependency theory has been instrumental in understanding the resilience of Lebanon's consociational model and the potential avenues for change.

Section II: Institutional Design, Norms and Path Dependency:

Lebanon's political landscape is shaped by a resilient consociational system, resistant to reform despite recurring calls for change. This research utilizes path dependency theory to dissect the roles of identity, institutional norms, and design, elucidating the intricate web that perpetuates Lebanon's consociational trajectory. Moreover, the consociational path, solidified by the National Pact of 1943, underscores the centrality of sectarian identities (Lijphart, 1985). The Taif Agreement of 1989, aimed at altering this trajectory, encountered resistance due to entrenched historical roots and institutional inertia (Salamey, 2003). The persistence of identity-based politics is evident in Lebanon's resistance to fundamental change.

Historical choices, particularly the National Pact, created a path-dependent trajectory. Initially conceived as a temporary measure to maintain peace, the consociational system became deeply ingrained in Lebanon's political fabric (Lijphart, 1968). Historical trajectories and institutional structures have solidified the consociational model, creating a path dependency where attempts to reform face resistance due to entrenched norms and historical precedent. The Taif Agreement of 1989 represents an attempt to alter Lebanon's consociational trajectory. However, path dependency theory helps us understand why the adjustments made in Taif did not fundamentally alter the consociational system. The inertia of existing institutions and the deeply embedded historical roots of consociationalism in Lebanon contribute to the system's resistance to change (Salamey, 2003).

Applying path dependency theory to Belgium's consociational model, we observe a divergent historical trajectory. The constitutional reforms of 1970, establishing linguistic autonomy, created a new path for Belgium. This adaptation allowed linguistic groups to manage their affairs independently, demonstrating how historical choices can influence subsequent developments (Lijphart, 1977). The path dependency in Belgium's case reveals a capacity for adaptation and a departure from the original consociational path.

In the Netherlands, historical religious and ideological divisions laid the foundation for consociational elements. However, the Dutch experience showcases a different trajectory as the country adopted a more integrationist approach over time (Lijphart, 1968). Path dependency theory helps explain how the Dutch consociational model evolved and adapted while maintaining certain elements of power-sharing.

Comparatively, path dependency theory illuminates the distinctive trajectories of Lebanon, Belgium, and the Netherlands within their consociational experiments. In Lebanon, the historical foundations and institutional structures have created a rigid

path, resistant to substantive change. The external influences and geopolitical complexities unique to Lebanon have reinforced the existing trajectory, making it challenging to deviate from the consociational path (Norton, 2012).

Belgium's consociational success can be attributed to its ability to adapt its trajectory. The linguistic autonomy established in 1970 represents a crucial juncture where Belgium departed from a rigid consociational path. Path dependency theory helps explain how this adaptation allowed Belgium to navigate linguistic and cultural complexities, creating a more flexible governance model.

The Dutch experience, rooted in historical religious divisions, showcases the flexibility of path dependency. While maintaining certain consociational elements, the Dutch trajectory evolved with an integrationist approach. The path dependency framework elucidates how the Dutch consociational model adapted to changing societal dynamics.

In conclusion, path dependency theory provides a nuanced understanding of the historical evolution of consociationalism in Lebanon, Belgium, and the Netherlands. Lebanon's consociational trajectory is marked by rigidity, entrenched by historical foundations and geopolitical complexities. In contrast, Belgium and the Netherlands demonstrate adaptability within their consociational models, showcasing how historical choices and institutional adaptations can influence the trajectory of governance systems. Understanding these trajectories through the lens of path dependency is essential for comprehending the challenges and dynamics of consociationalism in diverse socio-political contexts.

Identity and Path Dependency:

Lebanon's consociational path, solidified by the National Pact of 1943, underscores the centrality of sectarian identities (Lijphart, 1985). The Taif Agreement of 1989, aimed at altering this trajectory, encountered resistance due to entrenched historical roots and institutional inertia (Salamey, 2003). The persistence of identity-based politics is evident in Lebanon's resistance to

fundamental change.

Institutional norms within Lebanon's consociational framework contribute significantly to path dependency. A comparative lens with Belgium's adaptive trajectory and the Netherlands' evolution toward an integrationist approach highlights the rigidity of Lebanon's institutional design (Norton, 2012; Lijphart, 1977, 1968). Belgium's linguistic autonomy and the Dutch experience underscore the potential for adaptation within consociational models. Efforts to reform Lebanon's consociational system face formidable challenges rooted in path dependency. The October 17 uprising of 2019 showcased public demand for change but encountered resistance from consociational norms and historical precedent (Pappalardo, 1981). External influences and geopolitical complexities unique to Lebanon further complicate reform (McCulloch & Allison, 2014).

Lebanon's consociational system faces challenges deeply rooted in sectarian identities, demanding a shift in historical foundations and institutional structures (Bogaard, 1998). Understanding and addressing these intertwined aspects are crucial for navigating the complexities of political reform.

Conclusion:

This research provides a thorough analysis of Lebanon's consociational system through the prism of path dependency theory. The enduring nature of Lebanon's consociational model is deeply rooted in historical trajectories and institutional structures. Comparative perspectives with Belgium and the Netherlands highlight adaptability within consociational models. As Lebanon confronts the complexities of political reform, the role of path dependency becomes even more apparent.

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Game Changing and Profound Transformations: The Political-Economic Repercussions of the Energy Crisis on the MENA Region in Post Russia-Ukraine Conflict

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Abstract

The main purpose of the paper is to study the political economic and geopolitical repercussions of the Russian Ukrainian conflict on the MENA region concerning the energy security perspective. So, the paper has aimed to answer its main research question about how the energy crisis globally has contributed in game changing and profound transformations regionally after the escalation of the Russia-Ukraine conflict. This paper has adopted the analytical descriptive methods to tackle the main research question through analysing the desk resources and secondary data retrieved from related datasets and research studies.

Some main results have been concluded most notably that the Russian Ukrainian war and its implications on the energy security has caused game-changing in the MENA region through the transformations in the patterns of relations among actors across the region due to the opportunities and challenges emerged from this crisis. However, the implications of the crisis on the actors of the energy system in the MENA region have not been equal, as some actors have managed to make the most use of the chances to promote their position and interests while other actors have faced more domestic troubles and have been most likely to be affected by the regional and global competition on the energy resources. Threats also have emerged even domestically or on the intra-regional and interregional levels among the regional actors and foreign actors as well. So, it is required to work on promoting peace instead of conflict through focusing on the various perspective of regional cooperation under the umbrella of the energy diplomacy.

Keywords:

Energy Security - Energy System - MENA - Balance of Power - Political Economy

Introduction

Whereas energy security has played a vital role in the geopolitical and economic interactions globally, that role has gained additional prominence as energy security has become a top priority for policy makers globally especially after the escalation of the Russia Ukraine conflict which has severely affected energy security. Accordingly, energy security volatility has exacerbated due to price and supply fluctuations which have led to transformations in energy policies to secure it during times of crisis whether through looking for alternative suppliers or through shifting to renewable and untraditional sources.

The Middle East and North Africa (MENA) region was affected by these profound changes globally related to the energy security, such as the transformation in the balance of power in the global system, in addition to the geopolitical and political-economic interaction between great powers⁶⁴ and the region, and interactions between the main regional players themselves. So, new patterns of relationships and interactions have emerged regionally that causing the reshape of the ways through which the national interests would be defined and attained. In addition, these transformations could have impacts on the geopolitics of the region and the existed issues and escalated conflicts.

In other words, the current crisis of energy security has caused several repercussions on by generating promising opportunities for the regional actors together with causing more complications and threats. In Fact, the MENA region is

⁶⁴ (China – Russia – United States – European Union)

considered as a main player in the global energy markets due to their major contribution in the production of both non-renewable and renewable energy sources in addition to their hegemony on some key entities especially OPEC+ cartel and the East Med Gas Forum (EMGF).

Nonetheless, the political-economic repercussions of the energy security crisis on the MENA region are debatable. It may be referred to two points of views in this regard: whether the current crisis could lead to the promotion of peace and prosperity regionally in addition to the strengthening of the position of the MENA region in the global system, or it could increase instability regionally due to the escalation of the global competition and scramble for the MENA's energy sources.

The Research Question:

Based on the above, the current paper has endeavoured to answer the following research question: **How the energy crisis globally has contributed in game changing and profound transformations regionally, through causing political-economic repercussions on the MENA region after the escalation of the Russia-Ukraine conflict?**

Methodology

This paper has adopted the analytical descriptive methods to tackle the main research question through analysing the desk resources and secondary data retrieved from related datasets and research studies.

The Structure of the Paper:

The Paper aimed at studying the following points

- Theoretical Framework and Literature Review

- The interactions in the energy system and the current energy crisis: The features of the current energy crisis and its impacts (Some Key indicators and data).
- The Regional Context: the MENA region as a main actor in the global energy market.
- The political-economic and geopolitical impacts of the current energy crisis on the MENA region (Analysing the problematic two points of views).
- A way forward: Furthering the role of the MENA region to emerging victorious from this crisis.
- Results and Concluding Remarks.

1. Theoretical Framework and Literature Review:

The scramble over the resources and strategic landmasses has used to be one of the key drivers that shaping the global politics and norms which govern the international relations, among these natural resources, the energy resources such as oil and gas have played pivot role in the formation of the international and regional systems, together with the escalation of interstate wars and inner conflicts, according to various theoretical approaches tackling international relations like the realism, neo-realism, and constructivism. (Mohapatra, 2017)

Due to the interlinkage between energy security, economic development, and national security, the energy policies have gained more importance, especially in times of wars and crises. In addition, the pattern of relationship between energy suppliers and importers have contributed in shaping the regional and international relations and balance of power among the main actors. (Pascual, 2008)

Literature refers to energy security as a term meaning the availability of energy sources at an affordable price. According to International Energy Agency (IEA), energy security has wider scope and many aspects on short term and long term as well. In other word, energy security means the energy system's ability to cope with any sudden changes in the supply-demand balance. (IEA, 2023) It is also indicated

that energy vulnerability term is related to energy security, it refers to the extent to which the energy system is resilient to challenges and economic, social, environmental and governance risks. (Gatto & Busato, 2020) So, the energy security term has developed by the time.

It is also indicated that, it is difficult for any country to achieve self-sufficiency of its energy needs depending on domestic sources alone due to the need for depending on foreign energy sources. So, the energy system and energy international relations have emerged reflecting the complex interaction between energy, economics, environment, and geopolitics. The energy international relations reflect the transnational interdependency between energy suppliers and importers. The patterns of geopolitical energy relations include dominance of suppliers together with dependency of importers among state and non-state actors⁶⁵ involved in the energy system in addition to the impact of natural geography and trade regime and routes. (Högselius, 2018)

Geopolitics of energy could also include patterns of coercion against suppliers themselves through boycotting their supplies to deprive them from the energy revenues. Meanwhile, energy could be used as a weapon in foreign policy even through manipulating supplies and energy prices, in addition to cutting the supplies from the enemies and guaranteeing these supplies for allies. That situation is not just for non-renewable energy resources but also for renewables due to the hegemony and monopoly of some actors of the prerequisites of production such as technology and critical minerals. Overall, actors try to overcome the vulnerability and dependency of their energy security in the energy system and reducing the related risks through adopting foreign policy aiming at achieving diversification of supplies' sources in addition to developing complex countertrade deals to create patterns of interdependency instead of dependency and hegemony of suppliers on

⁶⁵ Such as energy companies, investors, and MNCs

importers. (Högselius, 2018)

Energy security interlinks with national security. Therefore, the militarization of energy resources has increased, causing the escalation of turmoil, instability, armed conflicts, and wars while economic and strategic interests are threatened due to the instability of energy supplies. On the other hand, energy markets are vulnerable to instability and wars which could lead to surge in energy prices and disturbance in supplies especially when energy is used as a weapon. (Moran and Russell, 2008)

Furthermore, the importance of energy geopolitics has contributed in the emerge of the energy diplomacy, as this approach focuses on the foreign policies adopted by the both energy producers and importers state and non-state actors for the sake of promoting energy security through various tools and practices whether negotiating or coercive ways, in other words through adopting soft power tools or hard power mechanisms. (Wang & Xu, 2022)

2. The interactions in the energy system and the current energy crisis:

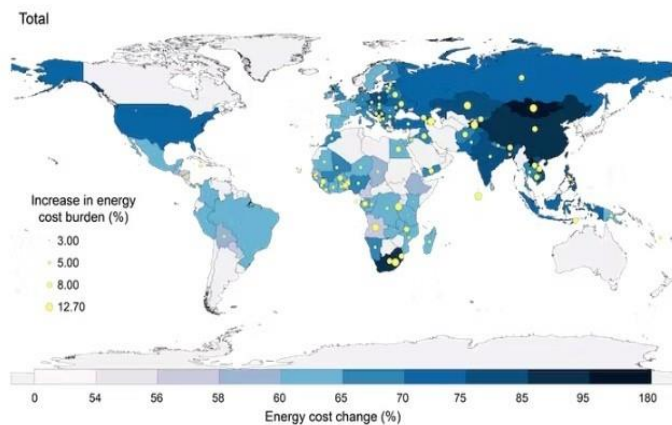
According to IEA, the world witnesses an escalating and complex energy crisis since the outbreak of the Russian- Ukrainian crisis. It has led to surge in energy prices causing the increase of the inflationary pressures, in addition to the reshuffling of energy investments, trade flows, and pipelines around the world because of the Russian - European tensions. It has also contributed in changes in energy policies through boosting the investments in clean energy and energy efficiency. (IEA, 2022)

The following figure shows the impact of the Russian- Ukrainian conflict on the global energy prices such as coal, natural gas, and crude oil. (Hubacek et al., 2023)

In addition, the following map also illustrates the impact of the energy crisis on the increase of the costs of energy burdens globally. It is also indicated that, Europe has witnessed waves of protests due to the escalation of energy insecurity and its impact on livelihoods in post Russian- Ukrainian crisis. (Reuters, 2022)

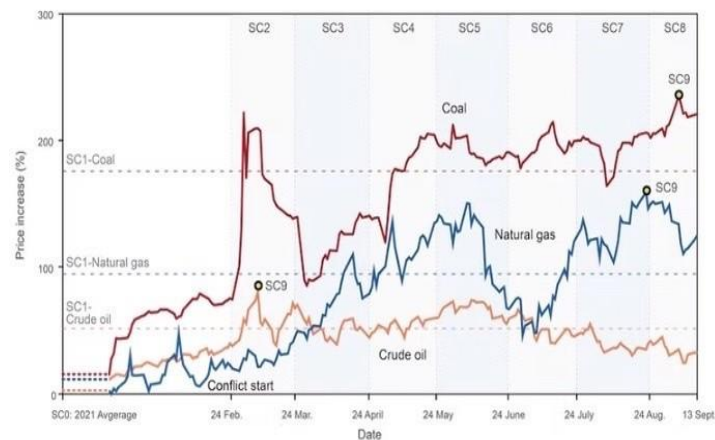
Meanwhile, the situation in the MENA region and its interaction with the current

Map no (1)
Impacts of rising energy prices on 116 countries due to the Russian Ukrainian war



Guan, Y., Yan, J., Shan, Y. et al. Burden of the global energy price crisis on households. *Nat Energy* 8, 304-316 (2023).
<https://doi.org/10.1038/s41560-023-01209-8>

Figure no (1)
surge in household burden due to the Russian Ukrainian war

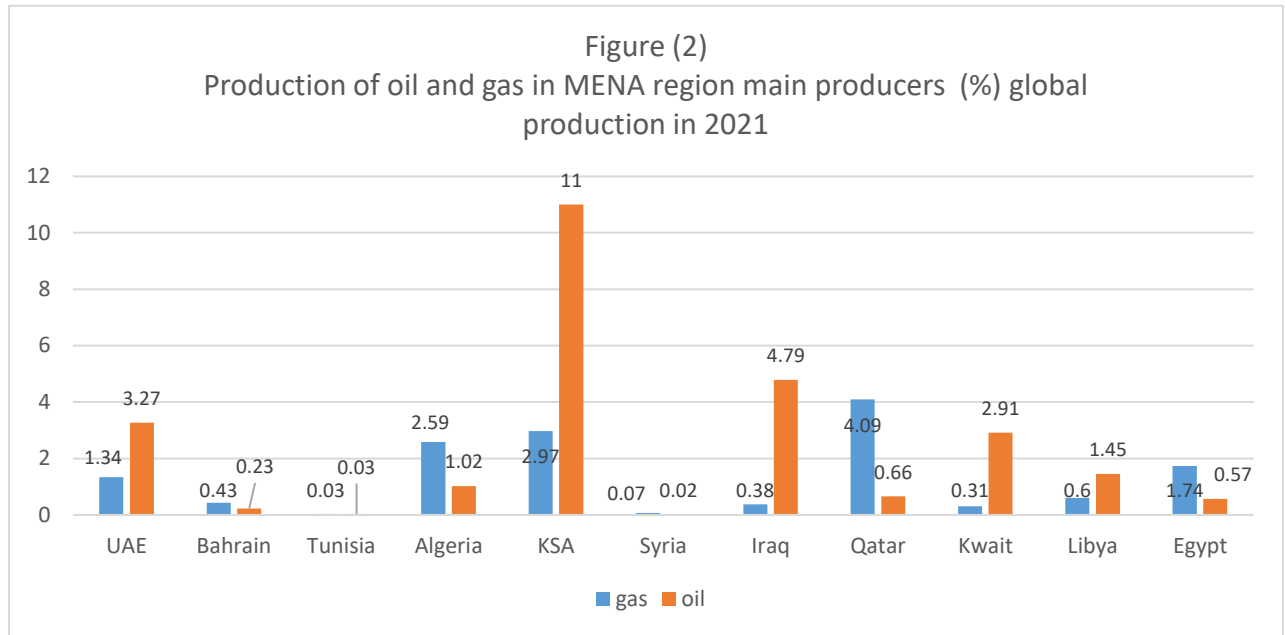


Guan, Y., Yan, J., Shan, Y. et al. Burden of the global energy price crisis on households. *Nat Energy* 8, 304-316 (2023).
<https://doi.org/10.1038/s41560-023-01209-8>

situation and transformation in the regional and international energy systems could be illustrated through the following section.

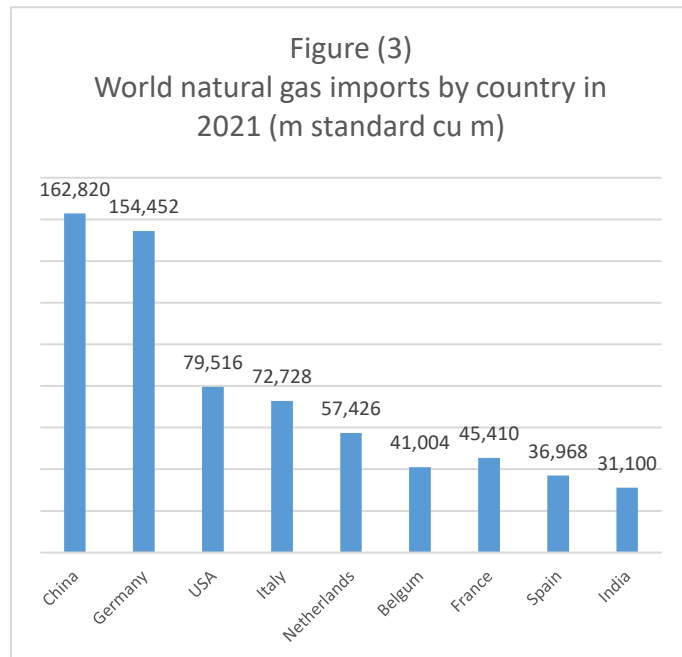
Concerning the energy production and potentials in the MENA region, it is illustrated in the following figure that the OAPEC energy producers have contributed in producing about 14.55% of global gas production and 25.95% of oil production in 2021.

On the other hand, the following figures show the higher levels of demands on oil

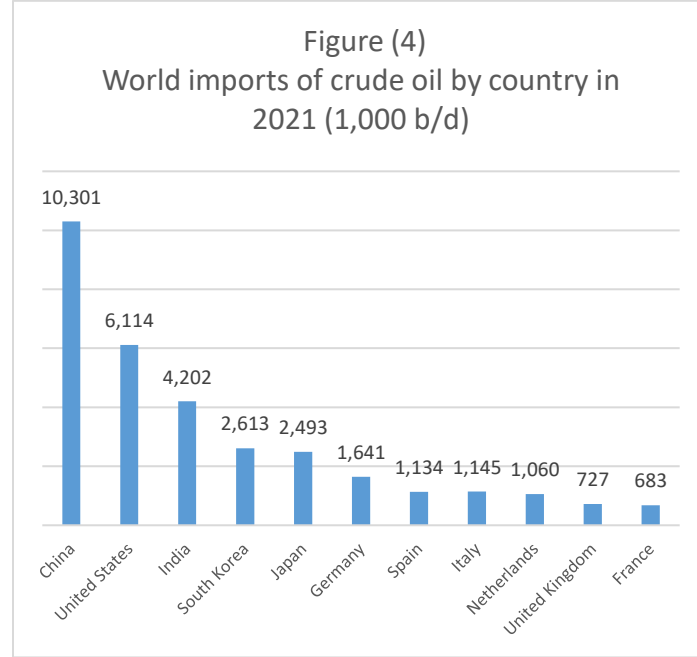


Source: OAPEC, 2022, the Annual Statistical Report

and gas globally, which could be a key driver for intense interactions in the regional energy system.



Source: OAPEC, 2022, the Annual Statistical Report, <https://oapeq.org/ar/Home/Publications/Reports/Annual-Statistical-report>



Source: OAPEC, 2022, the Annual Statistical Report, <https://oapeq.org/ar/Home/Publications/Reports/Annual-Statistical-report>

To sum up, the MENA region has worked on coping with the geopolitical transformations in the global and regional energy system in post Russian Ukrainian conflict to promote their role as influential actors through responding to the increasing demands of the importers whether on the non- renewables or renewables, which will be discussed in the following section.

It is also noted that, the impacts of the Russian Ukrainian conflict on the MENA region concerning the energy aspects have varied among the region, as the main oil and gas producers have witnessed revenue surplus because of the surge in oil prices, while other energy importers in the region have suffered from deficits such as the least developed Arab countries. (UNESCWA, n.d)

2. The Reasons and implications for the game changing in the regional energy system:

Due to the implications of the Russian Ukrainian conflict on threatening energy security especially in Europe, they have led to geopolitical transformations in the dynamics of the regional frameworks of the energy system on both suppliers and

demanders sides.

A) Transformation and Geopolitics of Gas

The MENA energy producers have sought assuring optimum utilization of the opportunities arose in the turning point that the energy system witnessed in post Russian - Ukrainian conflict, and due to the European transformation from Russian pipelines, in addition to the continuation of the dependency of EU on natural gas. Accordingly, the main East Med gas producers who have the needed infrastructure have worked on increasing gas exports to the European markets especially within the European Union's membership as an observer in the East Med Gas Forum (EMGF). So, Israel and Egypt signed an energy Memorandum of Understanding (MoU) with the European Union in June 2022.

The energy crisis in Europe has caused changes in the interrelations among regional actors, such as Egypt and Türkiye. According to some estimates, the eastern Mediterranean region could witness de-escalation after the re-normalization of the bilateral relations which is driven by many key motives perhaps the most prominent of which is the energy cooperation to promote the opportunities to reach the European energy markets while cooperating with other actors such as Israel. (Akpınar& Ziada, 2023) In addition, Türkiye has worked on promoting its role as a gas hub by expanding the Turk-stream capacities under the Black Sea to each

Europe instead of the European dependency on Nord-Stream. (Haytayan, 2023).

On the other hand, these ambitions in gas resources could increase tensions and risks of escalation of the long-lasting maritime conflicts in the eastern Mediterranean region between Türkiye, Cyprus, and Greece, and between Israel,

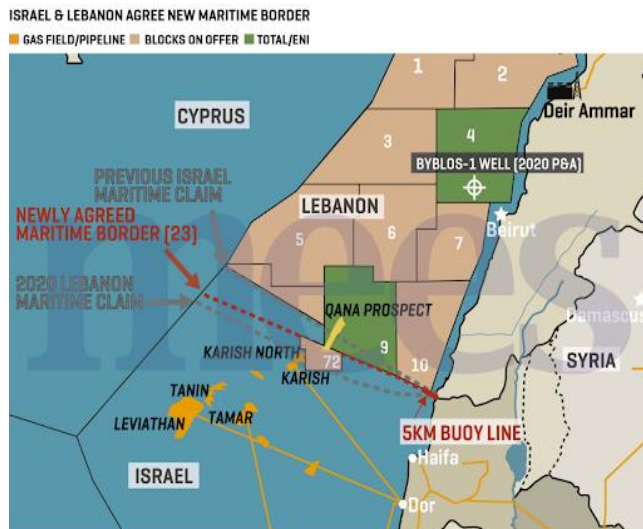
Map no (2)
Turk Stream and Blue Stream Pipelines



Source: Bauomy, Jasmin. "TurkStream: Europe Needs Gas and Russia Has It - the Story behind That New Pipeline." Euronews, January 8, 2020. <https://www.euronews.com/2020/01/08/turkstream-europe-needs-gas-and-russia-has-it-the-story-behind-that-new-pipeline>

Lebanon, and Palestine, (Serveta, 2023) in addition to the fears of tensions between the external actors scrambling on these resources which could lead to the stalemate of East-Med pipeline, as shown in the following maps. (Axt, 2022; MARGIT, 2022; Sayed, 2023 ; International Crisis Group, 2023).

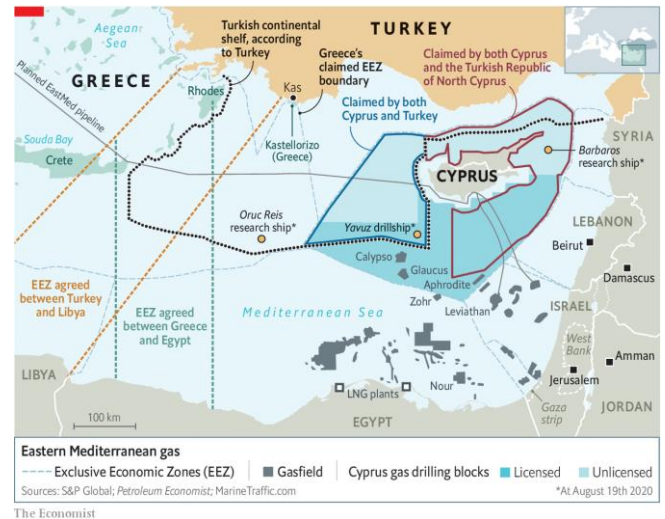
Map no (3) The Maritime Disputes Between Israel and Lebanon



Source: Yiallourides, Constantinos . "Rethinking Gas Diplomacy in the Eastern Mediterranean". International Crisis Group, April 26, 2023.

<https://www.thecairoreview.com/essays/another-step-toward-peace-the-lebanon-israel-maritime-agreement/>

Map no (4) The Maritime Disputes Between Cyprus, Greece, and Turkey



Source: The Economist. "A Row between Turkey and Greece over Gas Is Raising Tension in the Eastern Mediterranean," August 20, 2020. <https://www.economist.com/international/2020/08/20/a-row-between-turkey-and-greece-over-gas-is-raising-tension-in-the-eastern-mediterranean>

Meanwhile the situation in the western Mediterranean region is critical for the European Union's energy hopes, due to the unstable Moroccan - Algerian bilateral relations, as these tensions caused the closure of the Maghreb-Europe gas pipeline. (Onyango, 2023) So, the European countries have worked on dealing with these changing dynamics through shifting towards alternative ways to import gas, by working on reviving the Trans-Med pipeline linking Algeria to Sicily, as shown in the following map. (Reuters a, 2023) So, Italy tries to become Europe's southern gas hub. (Ghilès, 2022).

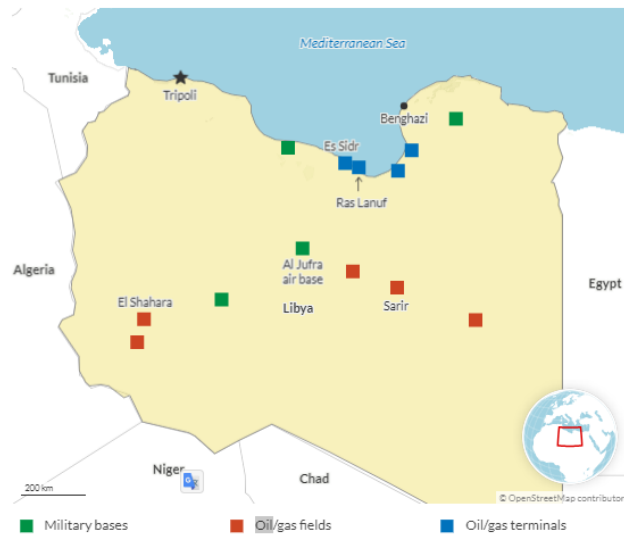
Map no (5) Underwater Gas Pipelines in Central and West MED Regions



Source: Ghilès, Francis . "As North African Energy Links Are Redrawn, Italy Becomes Europe's Southern Gas Hub." CIDOB, July 2022.

https://www.cidob.org/es/publicaciones/serie_de_publicacion/notes_internacionales_cidob/276/as_north_african_energy_links_are_redrawn_italy_becomes_europe_s_southern_gas_hub

Map no (6) Russian Wagner Group Presence in Libya



The Wagner group is present in several strategically important locations throughout Libya.

Fasanotti, Federica Saini . "The Wagner Group's Web in Libya." GIS Reports, October 9, 2023

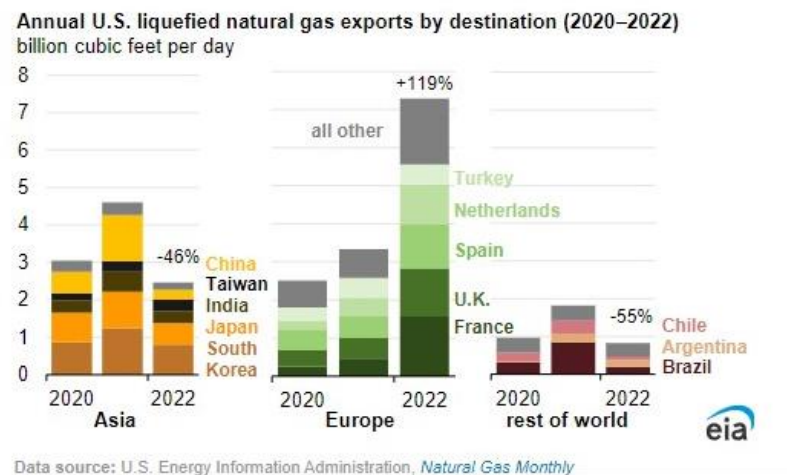
<https://www.gisreportsonline.com/r/wagner-libya/>

It is also indicated that, the stalemated situation and political fragmentation in Libya have

paved the way to make it a battleground for proxy war over the Libyan energy resources, as each external actor has sought to promote their energy interests by depending on their domestic allies. So, Italy has managed to sign an agreement with the Government of National Unity (GNU) headed by Abdulhamid al-Dbeibah in Tripoli, according to this agreement, the Italian energy company Eni and Libya's National Oil Corporation (NOC) have agreed on a \$8 billion gas production deal. (Jones, 2023) Meanwhile, the Russian involvement in Libya -mainly Wagner group- could threaten the European interests in the Libyan energy resources, especially due to the Russian presence in the strategic locations of oil and gas fields and terminals, as shown in the following map. (Fasanotti, 2023).

Figure no (5)
The Annual U.S Liquefied Natural Gas Exports by Destination (2020 - 2022)

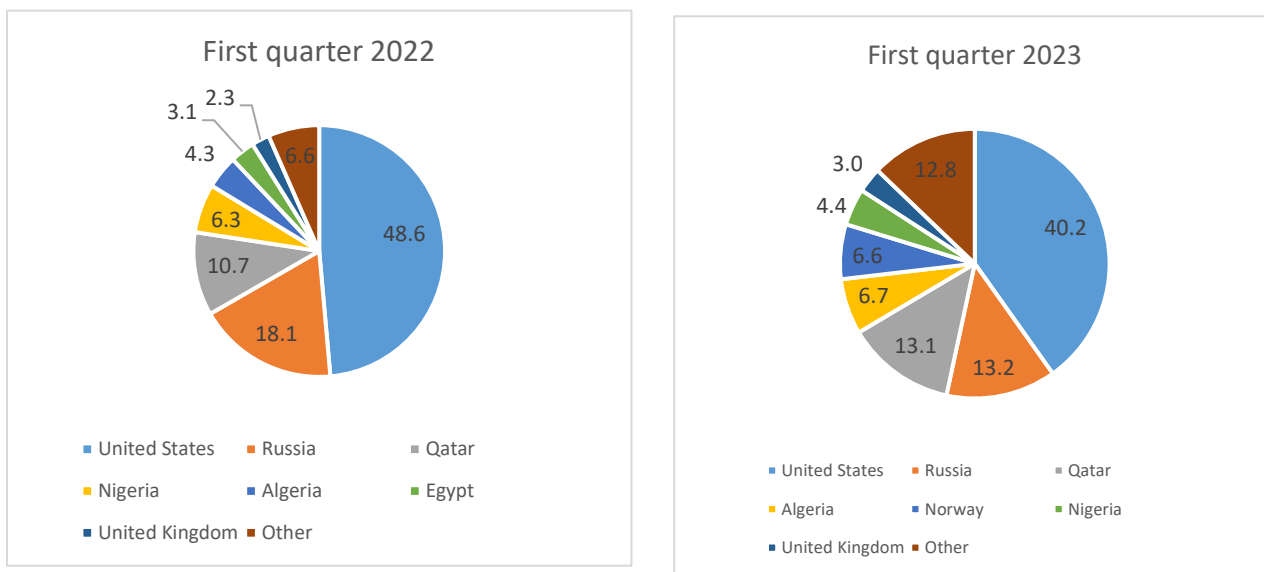
*Billion Cubic Feet Per Day



Source: The United States exported more LNG than any other country in the first half of 2023, EIA, <https://www.eia.gov/todayinenergy/detail.php?id=60361>

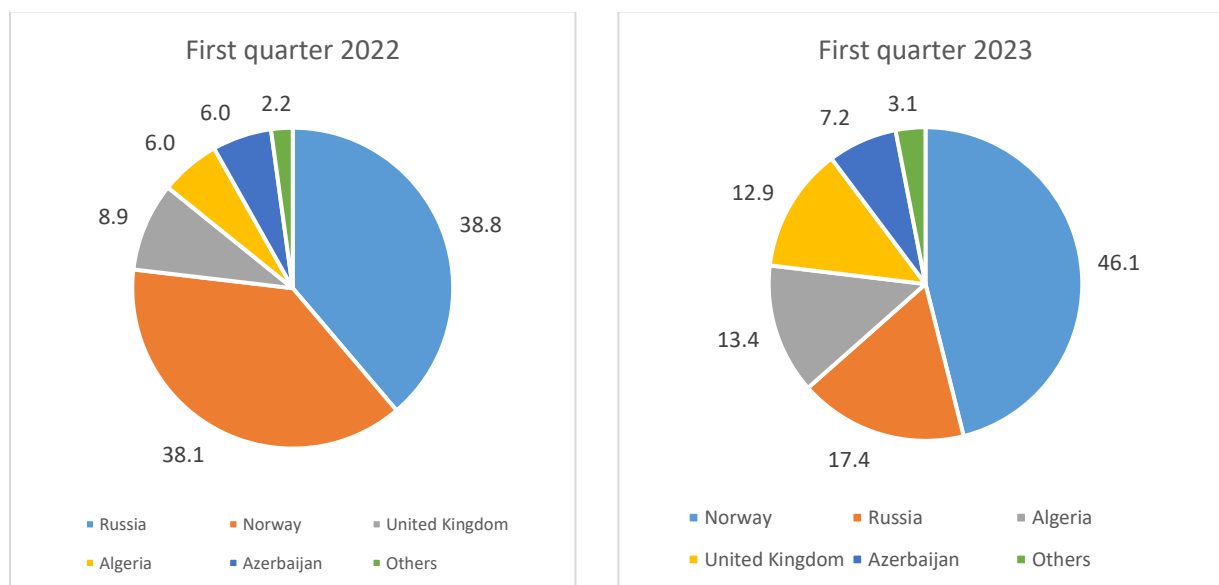
On the other side, United States has worked on exploiting the situation to promote its LNG exports to Europe compared to other competitors in the MENA region, to the extent that Europe has become the main destination for the American LNG in 2022, as it witnessed an annual increase by 119%, as shown in the following figure. (Green, 2023) clude, the EU managed to diversify its gas importers to reduce its dependency on Russian gas. The following figures shows the transformation in the European dependency on gas imports, as in the first quarter of 2023 the Algerian gas pipeline exports to Europe has doubled to reach 12.9% of total European imports, instead of 6% in 2022.

Figure no (6)
EU imports of liquefied natural gas by partner (share (%) of trade in value)



EU imports of energy products, by partner, Q1 2022 VS Q1 2023, Eurostats, <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20230704-1>

Figure no (7)
EU imports of natural gas in gaseous state by partner (share (%) of trade in value)



EU imports of energy products, by partner, Q1 2022 VS Q1 2023, Eurostats, <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20230704-1>

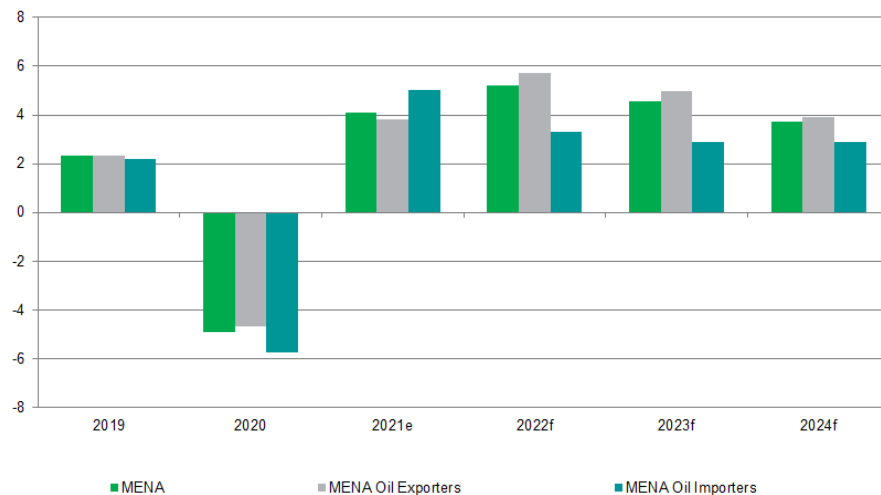
In other words, the region witnesses transformations in the energy system and energy map, causing the reformation of new maps of gas trade accompanied by geopolitical and diplomatic relation transformations, by opening the door for cooperation and tensions as well.

B) The Oil: Overlapping of geopolitics and economy

Concerning oil in the regional and global energy system in post Russian - Ukrainian crisis, it has led to geopolitical and economic game changing, which could be illustrated as follows.

The MENA oil producers are considered as one of the winners of the Russian - Ukrainian conflict due to the increase in oil demands which have enhanced petrodollar inflows, causing the surplus in the GDP growth rates since 2022, as shown in the following figure. (Naayem, 2022)

Figure no (8)
MENA Real GDP Growth Rates (2019- 2024)



Source: Naayem, Jamil. "MENA Oil Exporters Will Benefit from Russia-Ukraine War Fallout through Rising Petrodollar Inflows." *S&P Global*, May 25, 2022.

<https://www.spglobal.com/marketintelligence/en/mi/research-analysis/mena-oil-exporters-benefit-russiaukraine-war-fallout.html>

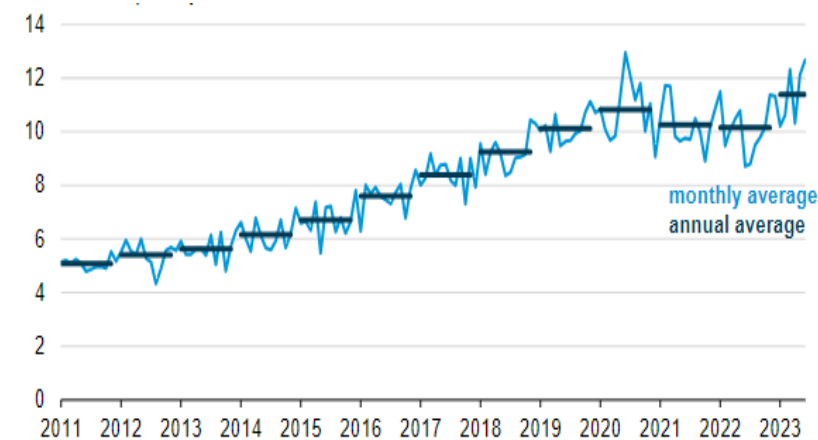
As the increasing gap between the declining oil supplies and rising demand had caused shocks in the oil market. Hence, US has sought to rely on Saudi Arabia to fill this gap through increasing its oil production. (Bordoff & O'Sullivan, 2023)

However, oil producers in the Gulf - mainly Saudi Arabia, and United Arab Emirates- have tried to promote their geopolitical influence in the global and regional systems through their hegemony on oil, (Talbot, 2022) causing tension in Saudi American relations especially after the geopolitical disagreement between OPEC+ and US on the American call for the increase of oil production to reduce oil prices, according to the Saudi - Russian coordination that copes with the geopolitical aspects in the bilateral relations. (Reuters b, 2023) As a result, US policy makers has tried to pass NOPEC bill due to the intensification of the rivalry between the two sides. (Gardner, 2022) In other words, one of the main aspects of geopolitical changes results from the Russian Ukrainian conflict is challenging US position and energy interests in MENA region.

On the contrary, the Chinese interests in MENA's energy resources have led to new dynamics in the regional arena in this era, particularly as the Chinese oil demand has grown after the end of Zero- Covid domestic policies, as shown in the following figure. Accordingly, China has tried to secure its oil needs through strengthening its ties with the main oil producers such as Saudi Arabia and Algeria.

Figure no (9)
Crude Oil Imports into China (Jan 2011- June 2023)

*Million barrels per day



Data source: China General Administration of Customs, as compiled by Bloomberg, L.P.

Source: "China Imported Record Volumes of Crude Oil in the First Half of 2023," n.d.
<https://www.eia.gov/todayinenergy/detail.php?id=60401>

(Dutton, 2023) In addition, the Chinese mediation to renormalize Iranian - Saudi relations could lead to secure the Chinese oil supplies from the two countries. (Shokri, 2023)

Furthermore, a new regional framework emerges and shaped due to the new energy dynamics raised by the rival blocs such as G20 and BRICS. According to some estimates, the post expansion BRICS+ will have significant impacts on oil markets due to the inclusion of both main oil producers and consumers, it is estimated that the new BRICS will control about 42% of global oil supply. (Baskaran and Cahill, 2023) In the meantime, G20 has tried to change the game through establishing the new trade corridor linking India to Europe via the Middle East, as this corridor could facilitate oil trade between Saudi Arabia and India, in face of the Chinese influence through Belt and Road Initiative (BRI). (Kennedy, 2023)

On the political economy aspect, the trend towards de- dollarization has grown especially through the quest for breaking Petro- Dollar bond. The harbingers of this trend could be witnessed through the bilateral deals between oil importers and exporters to make oil trade in local currencies instead of US dollar. In this regard, it could be mentioned that both China, Saudi Arabia, and Emirates have the intention to shift from dollar in oil trade as discussed in the Gulf Chinese summit in 2022. (Schaer, 2023 ; Dahan and Yaakoubi, 2022)

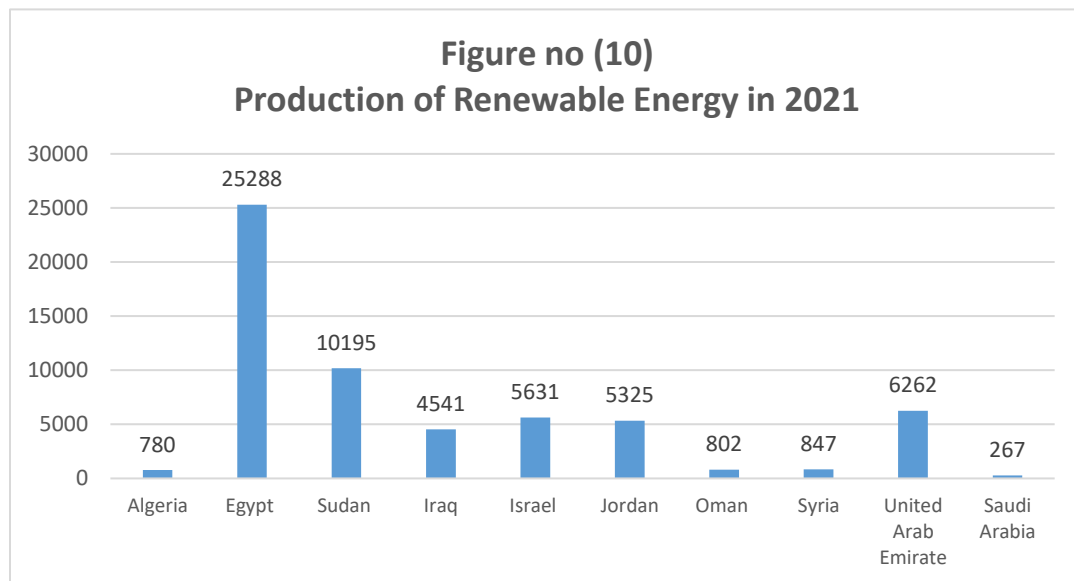
C) New Aspects of Cooperation in renewables

Due to the threats that facing the energy security while depending on the traditional energy resources such as oil and gas, the global transformation towards renewables has increased while working on reducing the demand on traditional energy resources, especially after the escalation of the Russian - Ukrainian war. So, the energy security policies have witnessed shifts towards renewables on short and medium terms to reach the climate net-zero goal, in addition to boosting and diversifying the global energy mix. (UNSDG, 2022)

Accordingly, both oil producers and demanders have sought keeping pace with

transformation towards renewables, causing significant changes in regional geopolitical and economic relations due to the changes in energy policies, as following.

The MENA region has the potentials to produce renewables due to the availability of the needed natural resources like wind, solar and hydropower, even for the oil and gas producers such as Egypt, United Arab Emirates, and Iraq, as shown in the following figure. (IRENA, 2023) So, these countries have seized the opportunity to promote their role in the regional energy system through the renewables' area.



Source: "Renewable Energy Statistics 2023." IRENA. Abu Dhabi: International Renewable Energy Agency, 2023.
<https://tinyurl.com/3pvwt5cx>

On the other hand, the energy demanders such as the European Union has searched for renewable alternatives. Thus, the European Union has tried to secure the needed energy to cope with the green transition under the umbrella of the green deal. Consequently, it has expanded its relations with the MENA renewable producers. (Talbot, 2023) In this regard, the transformation towards renewables has led to some regional repercussions, such as reshaping the geopolitical and economic relations across the Mediterranean to make the most use of the Southern renewable resources like solar and wind. (Tagliapietra, 2022) Moreover, the EU-

Egypt Renewable Hydrogen Partnership was launched in 2022, to be a base for building an EU-Mediterranean Renewable Hydrogen Partnership. (European Commission, 2022)

In addition to the cooperative interactions, the regional energy system has witnessed patterns of competition even among renewables producers who aiming to be regional hubs, or among the economic blocs who also have competed over the prerequisites for renewables productions such as the rare earth, and to control the infrastructure and routes of production and trade, for instance, the competition between G20 and BRICS+ on the MENA region's renewables through the establishment of infrastructure routes such as the India-Middle East-Europe Corridor (IMEC) which aiming to facilitate renewables trade through green bridges among continents. (European Commission, 2023) Moreover, the expansion of BRICS+ in 2023 could lead to the reshape of the global energy system through intensifying the production and consumption of renewables surpassing G7 by 2050. (Rystad Energy, 2023)

To sum up, the transformation towards renewables, especially after the outbreak of the Russian Ukrainian war, has contributed in reshaping the regional relations among renewable energy demanders and supplies, whether through reinforcing new perspectives of partnerships such as between the EU and their southern neighbourhood, in addition to creating a pretext for competition among regional actors and economic blocs to promote their energy interests in post oil era.

3. Conclusion

The Russian Ukrainian war and its implications on the energy security has caused game-changing in the MENA region through the transformations in the patterns of relations among actors across the region due to the opportunities and challenges emerged from this crisis. However, the implications of the crisis on the actors of the energy system in the MENA region have not been equal, as some actors have managed to make the most use of the chances to promote their position and interests while other actors have faced more domestic troubles and have been

most likely to be affected by the regional and global competition on the energy resources.

In other words, the MENA region has witnessed dramatical transformations on the regional energy system due to the implications of the Russian Ukrainian war, as some traditional regional actors have sought gaining a place of authority in the international arena through focusing on the production of oil or gas together with escorting the transformation towards renewables. Nevertheless, threats also have emerged even domestically or on the intra-regional and interregional levels among the regional actors and foreign actors as well.

In sum, the energy crisis resulted from the Russian Ukrainian conflict has contributed in the emergence of different patterns of relations in such a complex region like MENA. Accordingly, the energy security has gained momentum on the global and regional geopolitical and economic agendas, which would require working on promoting peace instead of conflict through focusing on the various perspective of regional cooperation under the umbrella of the energy diplomacy.

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Issues of Gender Equality in Egyptian Family Law: State Feminist Perspectives and Impact on Legislative Reform

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Abstract:

This paper examines how state feminism in Egypt represented in the National Council of Women tackles women's private- public rights dichotomy during the presidency of Abdelfatah el Sisi. It aims to scrutinize the reasons behind the prioritization of state feminism on framing non- controversial women's public right issues on the expense of developing women's private- family laws in their awareness campaigns. The analysis utilizes social movement theory specifically Tarrow's (1994) schema of opportunities to synthesize the political opportunity approach I.e. the stability of elite collation towards the existence of state feminism and the NCW 's formal access to state institutions. Additionally, Goffman's (1974) framing approach as well as Faurchurst and Sarr (1996)'s farming techniques helped analyze a prominent NCW campaign " Ta'a Marbouta" to examine whether the National Council of Women's awareness campaigns try to push forward and develop family law or not. The paper concludes that the relationship between the NCW, the state and Al Azhar is dynamic and combines elements of agreements and disagreements. Consequently, this top-down legislative action hampered by Al Azhar affects the development of Egyptian family law and women private rights during the presidency of Abdelfatah el Sisi.

Keywords: private rights; women rights, Social Movement ; Azhar , National Council

Introduction

Egyptian Family Law has a significant impact on gender dynamics, as it encompasses provisions from the Egyptian Personal Status Law and Child Law. These laws cover various aspects of family life, such as custody rights, birth

registration, alimony, divorce, guardianship, and inheritance. However, when analyzed from a gender perspective, it becomes evident that the law contains built-in gender inequalities.

These gender inequalities manifest in the law's emphasis on male dominance in marital relationships and the granting of guardianship over children to men. The law also reinforces the idea of the "husband" as the primary authority figure.

The slow progress in developing family law sheds light on how Egyptian state feminists perceive and address this issue. Karam (1998) explains that various feminist activists in Egypt have been advocating for reforms in family law using different approaches. However, the dominance of state feminism, represented by the National Council for Women, presents challenges to feminist efforts in advancing comprehensive family law reforms beyond the state's limited scope and agenda. Consequently, the affiliation of the National Council for Women with the state and the framing of their activism significantly affects the success of developing family law. Despite the efforts of feminist activists, the influence of state feminism, particularly through the National Council for Women, can impede progress in achieving substantial developments in family law.

This paper investigates how state feminism in Egypt, represented by the National Council of Women (NCW), addresses the dichotomy between women's private and public rights during the presidency of Abdelfatah el Sisi. The objective is to examine why state feminism prioritizes framing non-controversial women's public rights issues, at the expense of developing women's private and family laws. The analysis utilizes social movement theory, particularly Tarrow's (1994) schema of opportunities, to synthesize the political opportunity approach. This approach considers the NCW's formal access to state institutions as a way to synthesize whether the NCW's proximity to state institution impacts the development of family law. The paper highlights that the relationship between the NCW, the state, and Al Azhar is dynamic and involves elements of agreement and disagreement. Consequently, it argues that the NCW prioritize framing non-controversial issues on women's public rights on the expense of developing women's private-family

right and laws. That is due to the top-down legislative action hampered by Al Azhar during the presidency of Abdelfatah el Sisi.

Literature review

Scholars have approached the examination of family law development from different perspectives. On one hand, some researchers have analyzed the historical progression of state feminist activism and their strategies for advancing family law. On the other hand, other scholars have synthesized the factors that impede progress in family law development. The following literature review will explore the historical endeavors of state feminists to promote changes in family law throughout the presidencies of Nasser, Sadat and Mubarak. Additionally, it will investigate the underlying reasons why the advancements and reforms in family law have been minimal.

The level of women activism in Egypt has experienced fluctuations that are contingent upon the prevailing political context. For instance, state feminism in Egypt did not emerge distinctly until the presidency of AbdelNasser. Whereby Badran (1991) argued that feminist activism primarily focused on emancipation of women in the public sphere. By which, it was initiated with the wakening of women's salon and journalism, that highlighted the substantiality of women's participation in the work and educational fields. However, President Nasser's period reflected the beginning of the notion of state feminism, representing the ideas of the ruling government. Bier (2011) described this period as manifestation of state feminism. During the era of President Gamal Abdelnasser, debates on family law and the dichotomy between private and public rights started to rise on topics such as bayt el Ta'a (obedience house) and divorce (Bier, 2011). However, state feminism prioritized developments of women's public rights, increasing women participation in the public sphere and propagating for family planning and contraceptive methods. Notably, state

feminism in the post- independence Middle East is characterized by the state manipulation of women's strategies in the context of identifiable patriarchal bargains defining and limiting their domestic and market options. Hence, state feminism did not only shape women's rational choices, but also shaped their unconscious aspects in their gendered subjectivity (Kandiyoti, 1988).

For instance, Hatem (1992) stated that Article 61 in President Nasser's new 1956 constitution granted Egyptian women the right to vote and participate in the election process. Additionally, Article 61 encouraged Egyptian women to participate in the public sphere through voting and wage work (Bier, 2011). The stated commitment to public equality in the constitution was operationalized by Law No.14 of 1964. By which, the law guaranteed jobs in the governmental sector irrespective of their gender. In addition to that, Bier (2011) stated that labor laws were modified in order to ensure Egyptian women equal standing in the work field and labor force. By which, the law encouraged women through granting them 50 days of paid maternity leave (Hatem, 1992). Consequently, social attitudes towards women public rights (education and employment) changed and their presence in the public sphere increased. Not only that, but during Nasser's era, women were given the right to vote (Bier, 2011). Therefore, it can be concluded that state feminism was able to partially emancipate women in the public sphere. However, state feminism relatively turned a blind eye on family law developments in the private sphere. That can be due Nasser's new political institutional approach that introduced a new secularly religious government that integrated some emancipatory aspects but still did not exclude the religious sector of the Egyptian society.

Progressing to Sadat's era, Egyptian Islamists played a palpable role in hindering Egyptian women's attempts to develop family laws. Gunena and Wassef (1999) stated that new attempts for developing family laws were introduced by Jihan El Sadat as a form of state feminism. Whereby, these laws supported the rights for women to divorce if their husbands proceed to

second marriage, the right for women to acquire the conjugal house if they have custody of the children, and mutaa compensation. However, these proposals received large opposition from Islamists movements during President Sadat's period. Nevertheless, during Mubarak's era, Kamal (2016) argued that women activism especially with the revival of state feminism and influx of non-governmental organizations was able to amend personal status laws. Whereby, The National Council for Women as a coherent unite headed by Suzanne Mubarak was introduced in 2000. The council carried out different approaches towards women's rights, being able to introduce "Khul" law with other amendments of personal status laws during the presidency of Mubarak. However, some of these laws were patriarchal in nature and included sexist provisions.

Thus, state feminism became noticeable during the periods of Nasser and Mubarak when the National Council for Women was established. In the 1950s and 1960s, state feminism emerged as a new approach aimed at addressing gender inequality in Egypt. According to Hatem (1992), the state's efforts to grant women their rights predominantly focused on the public sphere, such as voting rights, maternity leave, and employment opportunities. However, personal status laws remained intact, indicating that state feminism did not challenge the patriarchal nature of family law. Instead, it emphasized the importance of empowering women in the public sphere at the expense of the private sphere. The introduction of state feminism in Egypt and the support for women's rights in the public sphere can be attributed to the state's economic ambitions and requirements during the Nasser and Mubarak eras, as women's participation in the public sphere was believed to enhance productivity.

Reasons for the excessive focus on women's public rights by state feminism can be understood by examining the divide between non-state feminist liberal groups and conservative Ulama (religious scholars). In Egypt, consultations with Al Azhar on family matters have always carried significant weight. However, Al Azhar is considered a legitimate and important reference for the state and state

feminism, including the National Council for Women. As a result, attempts by non-state liberal feminists to advance their agenda have been hindered by Al Azhar and conservative Ulama. Odeh (2004) argued that feminists were unable to fully develop Egyptian family law because the state adopted a policy of compromise between non-state Egyptian feminist groups advocating for liberal feminist reforms and conservative Ulama who opposed such reforms. This policy aimed to strike a balance between liberal feminism and conservatism.

Furthermore, the resistance from certain feminist groups towards the development of family law is another reason for the government's excessive focus on women's public rights. Karam (1998) explained that the diversity within feminist groups themselves provides insight into their contributions to public and private rights and helps analyze the reasons for the emphasis on public rights. While the differences between feminists are not clearly demarcated, their contributions reflect a certain degree of diversity. Secular, Muslim, and Islamic feminists approach women's rights differently. Their diversity is evident in their attempts to either utilize existing religious interpretations, seek to renew religious discourse, or completely separate religion from family law. Consequently, the opportunity for state feminists to develop family law is hindered by the internal divisions within Egyptian feminist groups regarding family law issues.

Karam (1998) highlighted that Islamic feminist, such as Zeynab el Ghazali, Safinaz Qazim, and Heba Ra'uf, firmly believe that women's dependence in the private sphere aligns with religious Islamic texts and is not problematic. Conversely, Muslim feminists have sought to challenge patriarchal interpretations of the Quran and have advocated for the development of family laws through the application of Ijtihad and the reinterpretation of Sharia law (Karam, 1998). In their work "Men in Charge? Rethinking Authority in Muslim Legal Tradition," Sharmani et al. (2014) synthesized how the concepts of Wilaya and Qiwwa have been misinterpreted in Muslim countries. They argue that Quranic verses actually promote equal responsibilities and gender equality between both genders in the public sphere.

Hence, due to the division between feminist groups and obstruction of secular and Muslim feminist demands by the state, state feminists in Egypt walked on the same path as the state and Al Azhar and focused more on women's public rights on the expense of developing family law.

Furthermore, reasons behind the under development of family law and women private rights can be traced back to gender reforms initiated by post-colonial states in the Middle East. By which, these reforms were a reflection of the nationalist aspirations for popular sovereignty, that worked to define a new modern role for women (Kandiyoti, 1994). These reforms shifted from private patriarchy to public patriarchy in order to meet the needs of the state, through engaging women in the economic and political spheres. However, gender relations in the household remained the same. The integration of women in national projects has been characterized by ambiguities and paradoxes (Kandiyoti, 1994). Women were expected to submit to the needs of nationalist projects in the work field, and at the same time perform their national duty in bearing children for the next generations. Thus, these national projects freed women from the household in order appropriate their services so that they could have the chance to participate in work fields and labor market. Consequently, gender relations were not changed especially in the arena of family laws and domestic discrimination (Kandiyoti, 1994).

Additionally, El Hussein (2023) argued that Arab countries used the notion of state feminism in order to validate and legitimize its rule in front of Western societies and governments. This type of "gender washing" was a result of the centralization of regimes, where they adopted policies that supports women only for the purpose of state legitimation. By which, these reforms constitute a cynical performance that only benefited state legitimation, with superficial changes in gender relations. Thus, changes in gender family relations did not change due to the superficiality of reforms that only benefited state legitimation.

Although the aim of these reforms might be state legitimation and international recognition. However, they were not completely useless or meaningless to women. President Nasser's labor laws and social welfare policy

introduced women in the work field and made them more visible in public spaces. Not only that, but also Jihan El Sadat and Suzanne Mubarak were able to push forward and integrate Egyptian women in the parliament, apply Khul law, increase feminist organizations, etc. Notably, the national aims during President Nasser for example were revolving around independence and nation building. Consequently, approaches towards women rights and equality were not the main goal. Hence, the above women rights developments were considered as an achievement in comparison to the political environment surrounding post- colonial Egypt.

Hence, the under development of women's private rights and family law can be understood through the dichotomy between non state liberal feminists and conservative Ulama, division between Egyptian feminists, and the type of gender reforms initiated by post-colonial Egypt that aimed to legitimize its rule.

Theoretical Framework

The thesis will utilize theories of political opportunity structure to analyze the contributions of the state feminist movement to the reformation of family law. It will specifically focus on the formal access to state institutions as key components of these theories. The political opportunity approach will be employed to examine how the actions of state feminist activists are influenced by the presence or absence of opportunities provided by government officials. Tarrow's (1994) framework of opportunities, which encompasses state repression or facilitation and the level of openness, will be applied to evaluate the opportunities afforded by the government to state feminist activist movements. Additionally, the thesis will utilize Wichterowiz's (2003) schema of opportunities, which considers the level of formal and informal access to political institutions and decision-making by the National Council for Women (NCW),

In summary, the thesis will employ theories of political opportunity structure to analyze the state feminist movement's impact on family law reformation and whether the proximity to state institutions impacted its approach towards women's private and public rights dichotomy.

Analysis/ Findings

The examination of the closeness and connection between the NCW and government institutions reveals whether the lack of progress in women's public rights can be attributed to the close relationship between the NCW and the state or not. By which, the state continues to be important in providing a predominant aspect of the structural context of the political units. These structural contexts and institutional opportunities include the state proximity or hostility towards the organization. Whereby, according to Tarrow (1996) political opportunities can be understood as the “*consistent but not necessarily formal, permanent, or national signals to social or political actors, which either encourage or discourage them to use their internal resources to form social movements*”. Hence, the NCW's formal access to state institutions can be understood through examining the NCW's member's affiliation to the state, the NCW laws, state fund to the council, the cooperation of the NCW with the state on its national plans and Al Azhar versus the NCW and state relation.

NCW Membership, laws and state fund

The top-down legislative action can be demonstrated in the high level of proximity between the Egyptian state and NCW. By which, the extent of the National Council for Women's official access to state institutions is evident through its member's affiliation in various government organizations. Some members of the NCW are affiliated with public governmental institutions such as ministries, embassies, courts, and jurisprudence institutions. It is important to note that the NCW was established by the state and operates within the framework of its national strategy and objectives.

The NCW new law stipulates that the council's executive board should include 30 members appointed by the President. As a result, this law will relatively help reflect the ideas of the members affiliated to the government to direct their approach on the decisions of the NCW. According to NCW's data base (2022)

examples of members include, Dr. Inas Abdeldayem the former Minister of Culture in 2018 as well as a member of the NCW, Nada Daraz the current Ambassador of Egypt in Malta and the Deputy Assistant Secretary of State Francophone, Counselor Amal Atta the current Head of Appeal at Qena Court Appeal as well member of the legislative Committee of the NCW, etc⁶⁶. Furthermore, one of the important members of the NCW is Dr. Saad el Din El Hilali the current Professor of Comparative Jurisprudence at the Faculty of Sharia and law at Al Azhar University.

Hence, out of the NCW's 24 members, 9 members are directly related to governmental institutions and ministries which consequently indicates that the level of formal access to state institutions is relatively high. Whereby, only few members are associated to Non-Governmental Institutions. In addition to that, the NCW included a liberal religious figure to further attach itself to religious values of the Egyptian society.

To evaluate the extent of formal access to state institutions, it is necessary to examine the 2018 law governing the National Council of Women (NCW), which was jointly developed by the state and the NCW. The controversy surrounding this law lies in its emphasis on the NCW's independence, while simultaneously highlighting the state's influence over the council. For instance, according to the NCW (2022), Article 1 states that the NCW is an independent entity. However, it also states that the NCW is affiliated with the Egyptian President. Similarly, Article 3 emphasizes the ability of NCW members to participate in various governmental entities, including the parliament, the supreme council for media and regulation, the supreme council for culture and professional trade, the national council, supreme council of universities, and civil societies. Additionally, Article 3 further underscores that the establishment of the council and its financial treatment should be determined by a decision from the President (NCW, 2022).

⁶⁶ Nagwa Khalil who was the Egyptian Minister of Social Affairs in 2012, Advisor Sanaa Khalil the Head of Appeal and Supervisor of the General Directorate of Human Rights Affairs at the Ministry of Justice 2019, Heba Hajras as the Chair of Disability Development Committee at the Ministry of Social Solidarity in 2014, Nisreen el Baghdadi who was a member of the Anti Corruption Committee in the Ministry of Social Affairs and the director of the national center for sociological and criminological research since 2012, Dawlat Swailam who worked as an Advisor to the Ministry of Social Solidarity as well as a political analyst for Egypt's Internal Affairs (NCW's data base, 2022).

Hence, Articles 1 and 3 point up the role of the Egyptian president in defining the independence of NCW as long as it preforms within boundaries put by the Egyptian president on its financial treatment. In addition to that, the state provide privilege for NCW members to join governmental organizations in contrast to other non-governmental women rights that are not aligned with the Egyptian state.

These members used their affiliation to the state to promote women causes. For example, Advisor Sanaa Khalil, a NCW member and the Head of Appeal and Supervisor of the General Directorate of Human Rights Affairs at the Ministry of Justice in 2019, was able to organize the first training for judges on combating violence against women. The NCW members were able to accessibly interact with members working in governmental institutions like the President of the Court of Appeal (NCW, 2022).

Organizations sponsored by the state facilitate the emergence and operation of the organization. Whereby a political organization is more likely to succeed if the political system is open and state's repression is low (Su, 2013). In the case of the NCW, the Egyptian state facilitated and eased the existence of the council. Furthermore, Su (2013) emphasized that leadership is one of the major features that defines the interaction between the state and the political organization. By which, restrictions are less likely to occur in organizations with top leadership affiliated to the state, in comparison to organizations that are initiated by forces within the society. Because the NCW 's leadership is decided by the Egyptian presidency, Maya Morsy the President of the NCW since 2016 has a strong foundation and stand when it comes to negotiations and compromises with the state on women rights issues. For example, Maya Morsy and several Women Rights organizations were able to denounce and stop the 2021 personal status law draft proposed by the parliament (El Din, 2021).

Subsequently, building on Article 3's access of state institutions to NCW members, Article 7 opens the door for the council to propose any new public policies to the state in regard to women's rights, leading to coordination with governmental agencies that specialize in developmental programs and campaigns

(NCW, 2022). For example, the NCW was able to push for a new law on FGM in Egypt that toughens FGM penalties (Naguib, 2021). Consequently, the NCW will be able to monitor and evaluate the application of the major women rights projects initiated by the state. In addition to that, Article 8 specifies that the Egyptian president and prime minister may refer to the NCW on what they regard and perceive as major issues in regard to women's rights. As a result and response to Articles 7 and 8, Article 12 emphasizes that state agencies are committed to assist the NCW and its branches to perform and facilitate its tasks, as well as providing the council with the needed statistics and data. For instance, according to the United Nations Development Program (2018), Egypt Demographic and Health Survey conducted a survey on behalf of the Ministry of Health to examine the statistics of FGM victims as way to provide the needed statistics for The National FGM abandonment strategy 2016-2020 that the NCW and state cooperated with each other in. It was able to conclude that more than 75 % of Egyptian girls aging (9-15) got circumcised. And 14% on girls younger than the age of 7.

Hence, Articles 1, 3, 7, 8, and 12 establish the fundamental framework for the National Council of Women (NCW) regarding its relationship with the state, highlighting the significant role of the state in determining the membership and leadership of the NCW. This is further supported by Articles 7, 8, and 12, which not only formally grant the council access to state institutions, but also provide the NCW with the autonomy to identify women's rights issues that require attention. As a result, the state has granted the privilege for NCW members to participate in governmental institutions.

According to the National Council of Women (NCW, 2022) in 2018, one form of support from the state is the inclusion of the council in the state budget. Article 10 of the NCW law states that the state should allocate funds for the NCW in its general budget. For example, in May 2022, Abdel Hadi Al-Qasabi, the Head of the Parliament's Solidarity Committee, approved the general budget of the NCW for the fiscal year 2022-2023, totaling 419 million and 956 thousand pounds (Ali, 2022). The committee also decided how the budget should be allocated, with

specific amounts designated for wages, purchasing goods and services, grants and social services, and other expenses (Ali, 2022). Additionally, Article 22 states that part of the council's resources come from credits and funds provided by the state's general balance (NCW, 2018). Article 21 mentions that the NCW's funds are considered public money and are supervised by the Ministry of Finance and the Central Auditing Organization (NCW, 2022). Consequently, Article 23 specifies that a special account should be established for the council in the Central Bank of Egypt to deposit its proceeds (NCW, 2022).

Based on the above provisions, the accessibility to state funding and budget can be interpreted in two ways. On one hand, the state is granting the NCW a privilege by including its activities in the state budget and providing funds from the general balance. On the other hand, the state exerts significant control and direction over the council's financial activities and closely monitors its transactions, resulting in a high level of dependence on state funding.

As mentioned above, the core laws, regulations, and members of the NCW are closely linked to the Egyptian government. Rao and Sivakumar (1999) stated that organizations aligned with governmental institutions often have a greater impact and visibility to the public because they shape their strategies in accordance with the organization's perspectives and goals. Organizations are more influential, especially when they do not face repression or sanctions that could hinder their activities (Rao and Sivakumar, 1999). In the case of the NCW, the council established its proximity to the state from the beginning through its memberships and laws, and it has not faced repression or sanctions from the state that would impede its activities. As a result, the NCW has the ability to have a greater impact by aligning itself with the state's major national strategies and women's rights agenda.

For example, the high level of proximity between the state and NCW can be seen in the state's cooperation with the NCW on its major national strategies. According to McCarthy and Zald (1977) for a political organization to succeed, it must attract and receive the support of many people. Indeed, the attraction of

participants can successfully take place if the government supports the strategies and goals of the organization. Not only that, but the government might initiate a national goal that fits the strategies of the political organization, as well as integrating the movement in it.

For example, the 2030 national strategy was introduced by the Egyptian government in cooperation with NCW in 2017. The strategy responds to Egypt's vision of 2030 that focuses on building a fair and equal society with an objective of reaching the highest degree of social inclusion (NCW, 2017). Consequently, the strategy encompasses political, social and economic empowerment for Egyptian women. The government supported the NCW through assessing the strategy with the National Center for Social and Criminological Research in order to conduct research (NCW, 2017).

The major decision makers and partners include number of ministries, governor's parliament members, judicial authorities represented by the Supreme Judicial Council and Public Prosecution, civil society organizations working women issues, media representatives, Think Tanks and syndicates (NCW, 2017). The decision makers are required to integrate their perspective into the strategy through meetings that include, meetings with 18 members of parliament, 8 ministries, individual interviews with 13 governors, and 10 group interviews with NGOs representatives (NCW, 2017). Hence, political opportunity was open in front of the NCW. By which, major elites and powerful forces were required to participate in the national strategy and put their input and suggestions in it.

Additionally, The NCW and the Egyptian government's cooperation continued to encompass other women's issues verified and accepted by Al Azhar and the government's orientation towards women's rights. Whereby, the government opened the door for cooperation as an attempt to fight and eradicate Female Genital Mutilation in Egypt. It can be argued that the state welcoming a new strategy to eliminate FGM and opening the opportunity for NCW to participate in it is not considered a radical or revolutionary action. That is because, al Azhar and the state has been fighting FGM since Suzanne Mubarak's campaign "The

beginning of the end” (El Tahawy, 2017). Hence, indeed the state opened the door for the NCW to fight for women rights issues. However, limitation in the scope of the available issues it can target occurred, leading to a concentration in development of women’s public rights on the expense of other disputable private rights like issues on polygamy, inheritance, husband beating his wife, marital rape, custody rights on economic and educational matters and alimony. Governmental coordination towards the National Strategy for Abandonment of FGM (2016-2020) included amendments in the panel code, as well as but the Egyptian Prime Minister’s recognition and approval on the establishment of the First National committee to eradicate FGM in 2019. The Committee is responsible for developing a framework to combat the medicalization of FGM and develop a new law to criminalize FGM (UNFPA, 2020).

Hence, the relationship between the NCW and the Egyptian state is intricate when it comes to the distinction between private and public laws. On one hand, the state offers the NCW institutional and discursive opportunities to collaborate on national strategies, provide support to NCW members, and contribute to funding the council. However, the NCW’s jurisdiction is still restricted to women’s public rights and non-controversial matters. The examination of contentious issues is controlled by significant governmental institutions such as the Egyptian parliament. As a result, the NCW benefits from a significant governmental opportunity for expansion, but this political opportunity remains constrained.

NCW, State and Al Azhar relation

Al Azhar as a religious institution is one of the main elite groups that have an impact on the decision-making process. Whereas the consultation of Al Azhar scholars and Sheikhs on women rights issues especially the ones related to family laws is vital. Therefore, its essential to analyze Al Azhar and the NCW’s relation to demonstrate the level of proximity in the decision-making process for both entities. Notably, the relationship between the two institutions is complex as they

have ambivalent floating relation that share points of agreements and other points of disagreements. By which, both institutions are strong allies to the Egyptian state. However, their approaches to solving the women problem might be different. Consequently, impacting women's private-public dichotomy.

As mentioned, the NCW, state and Al Azhar shares points of agreements and disagreements. By which, part of the political opportunity the NCW receives is the cooperation between NCW and Al Azhar on developing women rights in Egypt. For instance, Al Azhar adapted itself on multiple modernized women rights issues to keep up with the new modern world and fulfill the requirements of the Egyptian state and NCW. For example, the government's 2030 Strategy for Empowerment of Egyptian Women required Al Azhar to take some actions in regard to women inclusion in social, economic and political spheres (Ahram, 2022). On September 20 for the first time in the Egyptian history, Grand Sheikh el Azhar Ahmed el Tayeb appointed Nahla el Saidi as his female advisor. El Tayeb's decision came on the heels of President Sisi's landmark decision on opening the doors for women to work in judicial positions at the State Council and Public Prosecution (Ahram, 2022). Additionally, Sheikh el Azhar Ahmed el Tayeb appointed Reham Salama a professor at Azhar University as the head of Al Azhar Observatory for combating terrorism and extremism. Thus, developments in some issues related to public women rights were support by Al Azhar, including the right for women to participate in the political and decision-making sphere. By which, these issues were considered from the points of agreements between Al Azhar and the NCW.

Furthermore, as an attempt for modernization, Al Azhar attempted to renew the religious discourse as a way to reinterpret vague concepts related to women rights. For example, Al Azhar Grand Mufti El Tayeb and the Saudi Minister of Islamic Affairs Abdul Latif bin Abdul Aziz Al Sheikh called to revive al fatwa "the right of toil and pursuit" to preserve and protect the rights of working women who participated and made an effort in financially supporting her household and her husband's wealth (Khairy, 2022). Additionally, Al Azhar also tried to tackle the NCW's concerns on incidents propagated on social media on gender equality and

Islam's position on them. For example, On June 2022, The NCW submitted a report to public prosecution in regard to Mabrouk Attia's social media statement on the murder of Mansoura student. Mohamed Adel confirmed the killing of Nayera Ashraf after her parents disapproved of their marriage. Consequently, Mabrouk Attia commented that a woman should be veiled to live and not to be harassed by men, she must wear loose cloth if her life is precious to her. As a result, the NCW's president Maya Morsy condemned his statement and stressed that a preacher should not present his contempt for women and incite violence (Egypt Independent, 2022). Consequently, Osama Al Azhary the advisor of President Abdelfattah al Sisi for religious affairs, proclaimed that the incident is a tragic and catastrophic, criticizing Attaia's statement emphasizing that it's a vulgar and insulting comment (Egypt Independent, 2022).

Moreover, part of the NCW's and Al Azhar's cooperation and points of agreement is represented in the NCW's official YouTube page includes a separate category titled "Disclaimer" that provides voice records of Grand Mufti Ali Gomaa that supports women rights and clears up misconceptions. Disclaimers included variety of topics. For example, the importance of having women in the work field to fit the current society's needs (NCW, 2022), the need for understanding that women rights are not a given from anyone , but a given from God (NCW, 2022) , the rejection of child marriage in the Islamic religion and the prohibition of any kind of child abuse (NCW,2022).Moreover, the Grand Mufti included records related to women's public rights , specifically the importance of limiting and refraining from verbal and physical sexual harassment in streets (NCW, 2022)

Therefore, the facilitation of political opportunities granted to the NCW goes beyond formal access to state institutions and government support. It is also evident in Al Azhar's efforts to modernize and address the NCW's concerns regarding women's rights issues. Al Azhar has accepted and agreed to several women's rights issues advocated by the NCW. However, it is important to note that the relationship between Al Azhar, the state, and the NCW is fluid. Al Azhar's modernization is sometimes limited to issues that religious institutions deem

appropriate for renewal and modernization. Consequently, radical changes in controversial family laws, for instance, have not been recognized, leading to minor disagreements between Al Azhar, the NCW, and the state.

One specific point of disagreement and clash between the NCW and Al Azhar is regarding polygamy. The NCW has called for amendments to personal status laws concerning polygamy, specifically requesting that the consent of the first wife be a requirement if the husband intends to enter into a second marriage. The NCW argues that polygamy should have restrictions in order to ensure justice within Egyptian society (Ghareeb, 2022). However, according to Al Ghareeb (2022), the Grand Imam of Al Azhar stated that Islam does not make knowledge of the first wife a condition for the validity of a second marriage. He only advises the husband to inform his first wife and announce it publicly. Therefore, Al Azhar opposes a renewal in the religious discourse concerning polygamy and its marriage regulations.

Furthermore, clashes between Al Azhar and the Egyptian presidency also occurred, the Egyptian presidency occasionally disagree with Al Azhar on some issues. Indeed, Al Azhar has been a substantial supporter and ally when it comes to developing women's rights. However, the overemphasis on developing women's public or non-controversial private rights limits the scope and platform for the state and NCW. For instance, the issue on vocal divorce stirred dissent and objection over Al Azhar's statements. In 2017, the Egyptian presidency stressed on the necessity of issuing a law banning vocal divorce, because according to the latest statistics, 40% of the Egyptian couple divorce during the first five years of their marriage (Asar, 2017). However, in the ceremonial meeting, Sheikh el Tayeb expressed his disapproval on banning vocal divorce resulting in a minor disagreement between President el Sisi and Sheikh el Tayeb (Asar, 2017). Whereby, religious authorities claimed that the real solution for the high divorce rate will be educating the youth on the importance of the family and protecting them from drugs. However, banning vocal divorce as in Tunisia cannot be allowed because it goes against the Islamic principles (Asar, 2017).

Furthermore, another point of disagreement arose regarding the permissibility of a husband hitting his disobedient wife, which was sparked by Al Sheikh Tayeb's proposition in 2019 on the matter. In an interview on MBC, as reported by Amin (2022), Tayeb argued that the Quran justifies symbolic beating using a miswak (a teeth cleaning twig) as a disciplinary measure for a disobedient wife. This stance drew criticism from Egyptian society and women's rights organizations. In response, Maya Morsy, the president of the NCW, stated in an interview with MBC that husbands do not have the authority or right to physically harm their wives under any circumstances (Amin, 2022). She emphasized that Egyptian men should look to Prophet Muhammad as a role model, as he never resorted to violence against his wives. Additionally, the NCW supported a proposed amendment to Article 242 of Penal Code No.58 of 1937, seeking stricter penalties to combat domestic violence. This move was driven by the alarming prevalence of domestic abuse in Egyptian society, as supported by statistical evidence (Amin, 2022).

Moreover, Al Azhar, although lacking constitutional authority to propose new laws, plays a role in providing religious consultations on women's rights issues. This role sometimes leads to minor disputes between Al Azhar, the state and the NCW. In 2016, the Egyptian government announced the preparation of a new family law by governmental legislative bodies. The Egyptian Parliament and National Council for Women presented their proposals to Al Azhar's scholars for religious consultations. However, Al Azhar proposed its own comprehensive family law, resulting in a confrontation with the Egyptian presidency and parliament (Saleh, 2021). The parliament speaker, Ali Abdel Aal, refused to discuss Al Azhar's proposed law, arguing that religious institutions should not create bills and laws (Saleh, 2021).

The proposal put forward by Al Azhar included provisions that presented a confusing stance on women's rights in Egypt, particularly regarding women's autonomy in decision-making. The proposal had conservative elements that viewed women as dependents, while also attempting to address modern legislative

developments. For example, although the proposal suggested that marriage should require the affirmation of both parties and removed the bride's male custodian's power to stop the marriage, it still allowed the custodian to annul or reject the marriage based on the man's incompetence without defining what constitutes competence (Saleh, 2021). Additionally, while the proposal set the legal marriage age at 18, it opened the door for the male custodian to request permission from a judge to marry off a girl before 18 in cases of necessity, indirectly legitimizing child marriage (Saleh, 2021).

Moreover, the proposal drew criticism from Egyptian mothers who faced issues related to custody rights, guardianship, and financial support. By which, The proposal granted the father and grandfather control over the child's finances and education, excluding the mother from these decisions. Although the mother had the right to custody until the age of 15, she lacked the authority to choose the children's education or manage their finances (Saleh, 2021).

Furthermore, The proposal also limited women's freedom and independence by stipulating that a wife could only leave the marital home under specific circumstances defined by law or custom. It neglected women's rights to independence and placed emphasis on men's decision-making authority. Additionally, the proposal allowed a woman to request a divorce only if her husband was mentally healthy, implying that marrying a mentally unstable man was acceptable (Saleh, 2021).

However, the proposal also attempted to address certain problems faced by Egyptian women and families. It proposed adding children subject to custody to the list of people prohibited from traveling abroad to prevent fathers from taking them away (Saleh, 2021). It also suggested including fathers in the custodial list after the mother, aiming for gender equality. Moreover, the proposal addressed issues related to unknown paternity by advocating for scientific means and DNA tests to establish paternity. It also aimed to expedite family law cases by proposing that all cases be adjudicated within 30 days of filing (Saleh, 2021).

Overall, Al Azhar's proposal for a comprehensive personal status law displayed complex views on women's rights. It lacked ambition towards women's independence and emancipation in various areas. The provisions that attempted to align with modern developments often favored fathers in ensuring gender equality. Hence, The proposal posed a hurdle to the advancement of women's private rights and further developments in family law,

Conclusion

In conclusion, the relationship between Al Azhar, the state, and the National Council for Women in Egypt is complex and dynamic. By which, the complexity of the relationship between the three entities was reflected on the NCW's attitude towards women's private-public rights. The changing and dynamical relation led to the NCW's overemphasis on the importance of developing women's public rights, including women empowerment in the economic and political spheres, as well as the social sphere on issues that target women rights in public places such as sexual harassment. The dynamical relation is due to the position of each entity in the Egyptian society. By which, the NCW is a reformist agency that holds the same views as the Egyptian presidency, it works and forms its activities within the framework of the state's national strategies such as the National Strategy to Fight Violence Against Women, The National Strategy to Eliminate FGM and the 2030 National Strategy. Not only that, but the NCW also plays a dual role. Whereby, it is a reformist agency as well as an interest group that advocates women rights issues and proposes new topics and issues. On the other hand, Al Azhar is a quasi-independent entity that the state needs to legitimate the suggested policies on women rights. Consequently, the NCW's dependence on the state's approach and the state's need for legitimization from Al Azhar impacted the NCW's attitude towards women's private-public rights dichotomy. The political opportunity provided to the NCW included also the high level of formal access to state institutions encompassing institutional opportunities. Institutional opportunities included the affiliation of some NCW members to state institutions, the high level

of proximity between the NCW and the state mentioned in NCW 2018 new law, state fund to the council, and the shared cooperation between the NCW and state in major governmental national strategies. The new membership division included 9 out of all members of the NCW who are affiliated to major governmental institutions, as well as liberal religious figures. Furthermore, the bylaws of the NCW encompassed several articles that demonstrate the role of the Egyptian state in defining the dynamics and activities of the council. By which, organizations sponsored by the state are usually eased and facilitated by the government with less restrictions. The NCW's by laws mentioned the role of the Egyptian Presidency in determining the NCW's financial situation, and membership. Additionally, the laws formally opened the opportunity for NCW members to join state agencies and institutions, as well as have the chance to propose any new recommendations for women rights issues. Hence, the NCW by laws are considered a strong base for the NCW's proximity to the Egyptian state and presidency. Furthermore, the bylaws also highlighted that the NCW's money shall be supervised by the Ministry of Finance and the Central Auditing Organization. Besides, the Egyptian presidency mentioned that the NCW's fund will be allocated in the state's general budget. Thus, leading to high level of dependence of state funding. The high level of support from governmental agencies was met by a support from Al Azhar as well. By which, Al Azhar and the NCW have a floating relation with points of agreements and disagreements. Al Azhar adapted itself with the NCW on some women rights issues to fit the modern world. As in the examples of, Al Azhar's appointment of the first Egyptian female advisor, its attempt to renew the religious discourse through the fatwa of the "right to toil and pursuit" and its quick response to the NCW's report on Mabrouk Attia. In addition to that, Al Azhar tried to initiate a more moderate stance on the NCW's YouTube page, through introducing a religious section to propagate for women rights in Islam. Notably, as mentioned, Al Azhar, NCW and the state experienced agreements and disagreements. For instance, Al Azhar clashed with the NCW on issues such as polygamy, hitting the disobedient wife, and vocal divorce. Additionally, Al Azhar

proposed its own coherent personal status law although Al Azhar is only a consulting institution and does not have the authority to propose drafts for new laws. The draft included several drawbacks in regard to women rights that were unaccepted by the NCW and the state. Hence, indeed Al Azhar represents a strong ally to the state and the NCW in terms of its religious consultancy on women's issues. However, disagreements and clashes still occur between the three entities, which consequently lead to the overemphasis of the NCW on developing women's public rights, on the expense of private laws and rights. Hence, the NCW's overemphasis on developing women's public rights was due to the complex relation between Al Azhar, NCW and the state, and Al Azhar's halting of some developments in women's private rights and personal status law. However, this does not mean that the NCW is not an advocacy group that hold independent views towards women rights. Indeed, it proposed issues and concerns such as its criticism of Mabrouk Attaia's statements, refusal of Al Azhar's personal status law draft, etc. Thus, the NCW's dual role as well as the position of Al Azhar in the Egyptian society impacted that private/public rights dichotomy.

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