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Local government autonomy in Nasarawa State: Panacea for grassroots development

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Abstract The paper examined and articulated some measurable instruments and conditions for effective management of autonomy for local government in Nasarawa State. This is with a view to investigating the challenges of efficient and effective management of this level of government. The methodology used in the study was descriptive qualitative analysis. The management of local government finance was analyzed using efficiency theory. It was discovered that management of local government finance in Nasarawa has been bedeviled by lack of long-term financial planning, corruption, the use of inappropriate budgetary system, and so on. It was the contention of the paper that appropriate constitutional amendments to remove certain cogs in the wheel of making local governments an independent but coordinate part of Nigeria federalism will ensure efficiency in the management of local government finance. Long-term financial planning and appropriate budgetary system will be ensured.

Introduction

Local government, as a third tier of government, was established with specific functions to assist the federal and state governments in enthroning effective rural development and good governance at the grassroots level (Abe and Omotosho 2014). However, the local governments system in Nigeria has failed to accelerate socio-economic and human development, mainly because of inadequate funding. Agba, Ocheni, and Nnamani (2014) argue that inadequate funding has contributed immensely to the failure of local governments to perform their primary functions. Apart from generating funds through local taxes, the major source of revenue is through statutory allocations from the federal and state governments. To this effect, the federal government is

mandated to remit 20% from the Federation Account on a monthly basis to local governments through State Joint Local Government Account, while each state is expected to pay 10% of its internally generated revenue to its local government councils (Okafor, 2010).

This financial arrangement is often distorted by the lack of genuine autonomy of local governments as their funds are rarely provided state governments. Abubakar (2010) observed that local governments in Nigeria do not have a substantial degree of financial autonomy to engage in any meaningful development. Local governments have over the years suffered from the continued whittling down of their powers, as state governments have continued to encroach upon what would normally have been the exclusive preserves of local governments. Consequently, there has been a divorce between the people and government at their most basic levels. Lawal, and Oladunjoye (2010) blamed the lack of development in rural areas on poor financial management, which has over time hampered the completion of public projects, especially those that has to do with the provision of social welfare services. Most public projects in Nigeria are abandoned because of corruption.

According to Murana (2015), corruption has rendered local government administration inactive and devoid of concrete development activities for a long time. Corruption is predominantly widespread, undiluted, and unambiguous in the local government. It is a statement of fact that in the local government system, corruption has become all pervading, unabashed, uncontrolled, and persistent. Corruption within the local government system is mainly perfected through inflation of prices, ghost workers syndrome, award of contracts and subsequent abandonment, and outright payment of huge sums of money to political godfathers, etc. In enthrone financial prudence and effective management of local government funds, a financial memoranda was developed. The financial memoranda is an internal control mechanism aimed at guaranteeing accountability within the local government system.

Due to poor supervision, socio-economic factors, biting inflation, and sapping conditions, etc., most local governments in Nasarawa State are not financially accountable and do not adhere strictly to the provisions of the financial memoranda. The implications of poor management of local government funds cannot be overemphasized. Presently, local government councils exist only in name, not in service delivery, as many local governments lack basic infrastructure such as electricity, water, hospitals, roads, and schools. Mismanagement of resources in the local government has also heightened; poverty, illiteracy, unemployment, crime, etc.

Objectives of the study

The objectives of this study include:

1. To ascertain the financial viability of the local governments in Nasarawa State.
2. To ascertain the mechanism for effective management of local government funds and the extent to which they are complied with in Nasarawa State.
3. To determine the factors that impede the effective management of funds at the local government level in Nasarawa State.
4. To determine the effects of poor fund management on socioeconomic and human development in Nasarawa State.

Literature review

Meaning of local government

Many scholars of administration have defined local government in different ways. According to Ezeani (2012), the term local government refers to a political authority set up by a nation or state as a subordinate authority for the purpose of dispersing decentralizing political power. This takes the form of:

1. Decentralization.
2. Devolution.

Wraith (1972), Emezi (1986), and Denga (2003) defined local government as a political authority set up by a state by a subordinate authority for the purpose of dispersing or decentralizing political power, as well as promoting local initiative and response to local needs.

The United Nations Office for Public Administration defines local government as a political subdivision of a nation or (in a federal system) state, which is constituted by law and has substantial control of local affairs, including the powers to impose taxes or to exact labour for prescribed purposes. The governing body of such an entity is elected (Ola, 1984).

The 1976 local government reform defines local government as government at the local level exercised through representative councils established by law to exercise specific powers within defined areas. These powers should give the council substantial control over local affairs as well as the staff, institutional, and financial powers to initiate and direct the provision of services and to determine and implement projects so as to complement the activities of the state and federal governments in their areas. This reform aims also to ensure, through devolution of these functions to these councils and through the active participation of the people and their traditional institutions, that local initiative and response to local needs and conditions are maximized (1976 Local Government Reforms).

The local government system in Nigeria

All countries throughout the world have local government systems which, to a greater extent, are designed to identify local concerns and to set local priorities. Local authorities act as a system of administration in subdivisions of the state, usually governed by a council and/or mayor. In most developed countries, local authorities have substantial control over their responsibility for local affairs (Lawal and Oladunjoye, 2010). Unlike the developing countries where the local government is often hijacked and manipulated to serve as only a unit with no autonomous power to discharge, the evolution of local government in Nigeria can be briefly divided into three phases: pre-colonial, colonial, and postcolonial.

In the pre-colonial phase, different traditional systems of government existed which were adequate to satisfy the political needs of the different ethnic groups at that time. These traditional political systems were considered as a form of local government created by ethnic groups – Hausa/Fulani, Ibo, Yoruba, etc., for the provision of social services to meet the needs of the people within their domains. The second phase was the Native Authority system which was created

by the colonial master charged with the responsibility of collecting taxes, maintaining of law and order, road construction and maintenance, and sanitary inspection especially in township areas (Abubakar, 2010). The third phase was emerged following the demise of colonialism in 1960, and this phase was characterized by a multi-tiered local government structure in the Eastern and Western regions where both elected and traditional elements were accommodated (Okafor, 2010).

Historical development of local government administration in Nigeria

The history of local government system in Nigeria dates back to the colonial days. Although contact with Europeans dates back to the fifteenth century, it was not until 1861 that the first steps were taken to establish an administration by Britain. The colonial administration that was established was based on indirect rule, which required that the administration should be carried out through traditional rulers and institutions. This led to the establishment of native authorities in their most rudimentary forms from the 1890s to the 1930s. The main function of the native authorities was to maintain law and order. The first Native Authority Ordinance recognized traditional rulers as native authorities. This was easily done in Northern Nigeria, but there was a problem in identifying who those authorities were in Southern Nigeria. This necessitated the first reforms in the 1930s and the 1940s, culminating in the establishment of Chiefs-in-Council and Chiefs-and-Council in place of sole native authorities.

The Chief-in-Council is made up of the chief and members of council. The chief presides at all meetings and acts in accordance with the majority of opinion in the council. But if he disagrees with the council, he would take whatever action he thought best and inform the Governor of the region. Contrarily, in the Chief-and-Council, the chief has no power to act against the decision or advice of the council. Under this arrangement, people particularly representatives of missionaries and British trading interest were appointed into the native authorities. The process of appointment of nominated members by the colonial government meant that nationalists were not appointed to serve on the councils. This led to further agitation for reforms in the native authorities. In the years 1950–55, the first largely elected local government council based on the British Whitehall model emerged in Lagos and the former Eastern and Western regions. Traditional rulers constituted not more than 25 percent of most councils in the then Western region and Lagos. However, in Northern Nigeria, the changes were more gradual. The legal framework for local government at this period was provided by the Eastern Region Local Government Ordinance of 1950, the Western Region Local Government Law of 1952 and the 1954 Native Authority Law in Northern Nigeria. By this time, the councils were given a wider range of functions including primary education, health, police, judiciary, etc. This is in line with the implementation of the colonial government's ten-year welfare and development plan (1946–1956). The councils also enjoyed a great measure of autonomy in financial, personnel, and general administrative matters. It can therefore be said that the 1950s was the era of pupilage for councils in modern local government throughout Nigeria.

Between 1960–1966, there was a decline in the prestige and responsibilities of local authorities. In the former Western Region, the Local Government (Amendment) Law 1960 abolished the powers of councils to levy education and general rates on the basis of need. In Lagos, there was a high rate of default in the payment of property rates, including government institutions, which reduced the revenue of the local councils. The situation in Eastern Nigeria was similar to the West before the outbreak of the civil war in 1967. In Northern Nigeria, there were gradual changes in the structure of the councils with increasing numbers of elected or appointed non-traditional office holders becoming members of local authorities. The result was that the local authorities had a stable administration, which enabled them to assume responsibility, with some degree of success for more complex services like primary education. Between 1969 and 1971, some state government introduced some changes in the structure of their councils.

In 1976, the Federal Government, in collaboration with the state government, embarked on extensive reforms of local government. The objective of the reform was outlined as follows:

1. To make appropriate services and development activities responsive to local wishes and initiatives by devolving or delegating them to local representative bodies.
2. To facilitate the exercise of democratic self-government close to the grass roots of our society and to encourage initiative and leadership potential.
3. Mobilization of human material resources through the involvement of members of the public in their local development.
4. To provide a two-way channel of communication between local communities and government (both State and Federal).

For the first time in the history of local government in Nigeria, a uniform system was developed for the whole country. According to the then Chief of Staff, Brigadier Shehu M. Yar Adu'a, in his forward on the Guidelines for Local Government Reform (1976), he states thus:

In embarking on these reforms, the Federal Military Government was essentially motivated by the necessity to stabilize and rationalize Government at the local level. This must of necessity entail the decentralization of some significant functions of state governments to local levels in order to harness local resources for rapid development.

Unlike previous reform measures, which were highly restricted in scope and range, the 1976 reforms conceptualized local government as the third tier of government operating within a common institutional framework with defined functions and responsibilities. As the third tier of government, the local government receives statutory grants from Federal and state governments and is expected to serve as agent of development, especially in rural areas. According to the 1976 reform, 75 percent of members of the council are to be elected through the secret ballot on a no-party basis under the direct and indirect systems of election. The remaining 25 percent are to be nominated by the State government. Following the reform, the Federal Government, in 1977, allocated 5 percent of federally collected revenue to local government.

The intentions of the 1976 reform were debated by the Constitution Drafting Committee and the Constituent Assembly in 1978. The result is that the 1979 constitution reaffirmed the development function as provide for in Section 7, Subsection 3.

In addition, Section Seven of the 1979 Constitution provided for a democratically elected local government council for the country. Unfortunately, during the Alhaji Shehu Shagari regime (1979–1983), the constitutional provisions were neglected. No elections were held and, sole administrators were appointed. The Mohammadu Buhari regime (1983–1984) continued with the system of sole administrators. During Babangida regime (1984–1992), there were certain reforms aimed at ensuring local government autonomy. These included the abolition of the Ministry of Local Government, establishment of executive and legislative arms in local councils, and direct allocation to local government without passing through state government. The regime also increased local government statutory allocation from 15 percent to 20 percent with effect from 1992. It is important to point out that the intergovernmental relations between the Federal, state and local government has been characterized by both co-operation and conflict, but conflict has predominated in state-local government relations. Some state governments have been known to have hijacked and diverted Federal government's allocation to local governments. This is why one of the features of the reform during Ibrahim Babangida's regime was to make allocations directly to local governments without going through the state government.

In 1991, a major landmark reform was introduced as the system had legislative arm. Additionally, the Babangida administration increased the number of local government from 301 in 1976 to 453 in 1989 and 589 in 1991. The Abacha regime also increased the number to 774 local councils that we have today and the administrative structure also underwent some changes (Richard and Eme, 2015).

In summary, it can be said that no public institution in Nigeria has been so subjected to more frequent reforms than local government. Nearly every successive administration introduces one administrative change or another. Apart from the celebrated 1976 reforms, state government officials have also introduced various manipulations. For instance, in Ekiti state, the tenure of elected local government officials was reduced to two years, while some retained it to reflect three years. In the southwest, except for Lagos, a caretaker committee was introduced in 2003 immediately after the general elections. Similarly, in June 2007, some state governments dissolved their local councils and appointed caretaker committees to steer the affairs of the council prior the conduct of elections. It is germane to note here that these changes were not without resultant effects. Some of these changes met with social strife. For instance in 1997, the relocation of some local government headquarters was marked by large scale destruction of lives and property in Ondo, Osun, Delta, Rivers, and Cross-River States (Omotosho, 1998).

Specifically in Ondo State, the relocation of the then newly created Akoko South East local government headquarters from Oba Akoko to Isua Akoko was met with the destruction of lives and property. In 1998, Abubakar administration introduced sole administrator system at the grass-roots level before elections were conducted in December 1998 for the posts of chairmen and councilors. Also the dissolution of local councils in Ekiti State by the new administration of Governor Segun Oni in June 2007 generated furor between the local council's chairmen and the governor.

In essence, it has become almost fashionable in Nigeria for incumbent administration to introduce one change or the other in the institution. So far, the local government system in Nigeria has not been stable, leaving its future to remain bleak, uncertain, and insecure.

Local government reforms in Nigeria

Reforms are all about the introduction of new ideas on how best to manage or administer an organization. Local government reforms, therefore, have to do with fresh ideas, innovations, etc., on how best local governments can be administered. The history of local government administration in Nigeria explained some reforms or changes introduced at the local level of governance from pre-colonial to colonial periods. The major breakthrough in local government administration, however, is linked with the reform of 1976 (Kyenge, 2013).

The 1979 local government reform was a watershed and revolutionary in the sense that it was the first time a uniform local government was being initiated for the entire country. The reforms were also monumental in the sense that by one stroke, local governments were equipped with political, administrative, and fiscal capabilities to provide essential service to rural communities. Local government became a third tier of government with constitutional functions and responsibilities. Following the 1976 Local Government Reforms, 301 local government areas were listed in the 1979 Constitution to guarantee their perpetual existence, and traditional rulers could only serve the councils in advisory capacities (Lawal and Oladunjoye, 2010).

The 1976 reforms attempted to democratize the local as a tier of government, increase its autonomy in terms of functions and financial base, but it is suggested that these innovations did not go uncontested by state governments, which saw these innovations as being at their expense (Abudutu, 2011). In similar studies, Lukpata (2013), believed that the Babangida military government increased the number of local governments from 301 in 1976 to 453 in 1989, and 589 in 1991. The Abacha regime also increased the number to 774 local government areas. Babangida and Abacha regimes may have instrumentalized creation of local government areas as a means of gaining legitimacy and acceptance (Okafor, 2010).

Challenges to revenue generation in local governments in Nigeria

According to Agba, Ocheni and Nnamani (2014), some factors affecting revenue generation in the local government system as follows:

- (i) Financial management: The management of public finance constitutes the most crucial and central factors in the management process of the local government. The quality and effectiveness of local government services depend on the quality and quantity of staff, the level of motivation of the staff, and the quantum of service to be provided by the local government. Poor management is bound to bring about poor revenue generation.
- (ii) Inadequate budgeting process: Budgeting is the central activity in financial management. A budget is a financial plan that shows in detail the government's anticipated revenue and expenditure for a fixed period, normally one year. It is one of the powerful instruments for effective financial management. It sets out the financial objectives

of the local government for the year and sets out strategies for the realization. If adequate plans are made for revenue generation in the budget, more revenue will be generated. If not, the result will be low income generation. Low quality personnel: revenue generation is a very sensitive, strategic, and difficult task. The successful provision of services as contained in the annual budget depends on whether the targeted revenue is actually realized. This, in turn, depends on the competence, honesty, and diligence of the key financial officers of the local government: the treasurer, the chief accounting officer, the internal auditor, the council chairman who is the accounting officer and other finance officer.

- (iii) Improper accounting system: Accounting is an essential instrument for effective financial management. It is defined as facts relating to receipts and expenditures in operations of the local government with a view to ensure accountability and good management.
- (iv) Attitude of accounting officers: The control of public funds is achieved through the key accounting officers of the local government: the chairman, the treasurer, the secretary/HPM, and internal auditor.

The application of control mechanisms in the local government system in Nasarawa State

Despite the internal control mechanism put in place to ensure financial accountability within the local government system in Nigeria, it is still astonishing to note that many local governments are still unable to carry out their duties effectively and efficiently as a result of poor management of funds, which mostly stems from the fact that some of the internal control mechanism provided in the Revised Financial Memoranda are hardly adhered to (Anyadike, 2013).

Most local governments do not adhere to Sub-section 2, as investigations have shown that most finance officers do not work with the financial memoranda. These finance officers, after ensuring that local governments are duly paid, fail to ensure that the funds are paid into the coffers of the local government. This is masterminded with other key officials of the local government.

Often times, guidelines on audit queries and sanctions are neglected whenever it involves a superior officer. This is heightened by the fear of sack, which may arise when a superior like the Chairman is queried or sanctioned.

Although the duties of the treasurer is clearly outlined in Section 31.2, it is appalling to note that in Nasarawa State, most of the revenue collectors printed and issued fake receipts to market women in lieu of genuine local government receipts. Consequently, distorting expected local government revenue. This situation is further aggravated by the collaboration between key local government functionaries and the internal auditor, who through his audits often labels local government assets as unserviceable and scrap, thus paving the way to sell off such assets with the proceeds promptly remitted to him (the internal auditor and other key functionaries of the local government).

The local government system in Nasarawa State has been perturbed by the incessant unilateralist tendencies of the Chairman, who consistently embarks on huge financial commitments

without the mandatory approval of the Councils to the local governments as required by the financial memoranda.

Methodology

The methodology of this study covers the research design, study area, population of the study, sampling procedure and sample size, instruments of data collection, and methods of data analysis. A cross sectional survey research design was adopted in this study. This design was considered appropriate because it allowed the researcher the opportunity of eliciting data from target population through their questionnaires or interview instruments and to subject such data to statistical analysis for the purpose of drawing conclusions (Obasi, 1999). It equally allowed the researchers to examine the relationships among variables and develop explanatory inferences.

Study Location

The target population is the population that the researcher uses to generalize the findings of the study. Nasarawa State was created on 1st October 1996 by the then military regime of General Sani Abacha. The state was created with great hope and pleasantries for all her citizens and groups (Osaghae, 1994, p. 29). Nasarawa State was created to bring governance closer and accessible to the people. This was to ensure the maintenance of social peace, law, order, and equity. The State was also established to bring about social harmony, solidarity, and participation of the people in state-building process (Pannenberg, 1989, p. 43). Social justice and equality was intended to be the cardinal principles for state policies and decisions. As a result, it would facilitate socio-economic development, cordial relations, as well as ensure the security of lives and property. At the level of individuals, the state was intended to empower men, women and youths in order to enable them create wealth and enjoy good life (Dalat & Fliba, 2007, p. 3). The empowerment of the people would make Nasarawa State a prosperous, functional, and just state in Nigeria.

Nasarawa State is today considered a pluralistic society, in view of rapid socio-economic and political changes that have taken place over the years. These challenges came with the challenges of social relationship and interaction that raised tension among groups and among the government and the governed. The State has diverse religious, ethnic, and political classes with aspirations and interests. Implications for economic development in this study have to do with the social conditions, elements, and formalities upon which relationships of inequality, lack of accountability, and transparency can be understood. It shows the synergies that produce an effect, problem, or development. It has to do with the socio-economic and political experience upon which inequality strives. The State is suffering under the forces of indigenous bourgeoisie on one side and the proletariats on the other hand (Dalat and Fliba, 2007, p. 3). Population of the study: The State has a total population of 1,863,275 people (NPC, 2006). The population of this study was drawn from retired and practicing journalists, civil servants, traders, artisans, students, government officials, and unemployed youth residing across the state.

Table 1. Nasarawa State population distribution by local government area

S/N	Local Government Area	Population
1	Akwanga	113,430
2	Awe	112,547
3	Doma	139,607
4	Karu	205,477
5	Keana	79,253
6	Keffi	92,664
7	Kokona	109,749
8	Lafia	330,712
9	Nasarawa	189,835
10	Nasarawa-Eggon	149,129
11	Obi	148,874
12	Toto	119,077
13	Wamba	72,894
	Total	1,863,275

Source: compiled by the Author using the 2006 Population.

Sample size and sampling technique

A multi-stage sampling procedure was used in this study. This includes purposive sampling, snowball sampling, and simple random sampling technique. Firstly, purposive sampling technique was used to select the study sites in the state (Akwanga, Karu, Keffi, and Lafia LGAs). These LGAs were purposively selected based on the prevalence of media behaviors in contrast to societal and professionally acceptable expectations. In the second stage, two communities were selected from each of these LGAs, making it a total of eight communities in all. Snowball sampling technique was used due to the abuse of procedures and regulations, undemocratic tendencies, massive stealing of public resources, the insensitive, non-principled, and desperate conduct of politicians and personalization of state power coupled with the rising level of public frustration. In the final stage, random sampling technique was used to determine the sample size for the study, using Yamane's (1967) statistical formula as given as follows:

$$n = N / (1 + N(e)^2)$$

Where N represents population size

n represents minimum sample size

e represents the degree of error expected (0.05)

$$n = 1,863,275 / (1 + 1,863,275(0.05)^2)$$

$$n = 399.9$$

Sample size (n) is approximately **400**

Akwanga LGA= $113,430/742,283 \times 400=61$

Karu LGA= $205,477/742,283 \times 400=111$

Keffi LGA= $92,664/742,283 \times 400=50$

Lafia LGA= $330,712/742,283 \times 400=178$

Table 2. Population size of sampled LGAs in Nasarawa State and their respective number of respondents

Sampled LGAs	Population (2006)	
Akwanga	113,430	61
Karu	205,477	111
Keffi	92,664	50
Lafia	330,712	178
Total	742,283	400

Source: field work, 2022.

Instrument of data collection

A three-point-type questionnaire was administered to the respondents at various points of interaction. These include offices, residential houses, shops, government ministries, and schools. At each of the points, respondents were given a questionnaire each to fill and return to the researcher immediately. If a respondent could not fill the questionnaire immediately, the researcher had to leave it behind and come back for collection on other days. Where classes were used to administer the questionnaire it was done in groups, and the respondents waited upon to fill and return the completed questionnaire to the researcher. The instrument underwent content and face validity by professionals to ascertain its validity and reliability. Secondary data were obtained from different sources, including government publications, documents, works from the review of existing literature on these tiers of industries.

Instrument validity and reliability

Instrument validity pertains to the ability to accurately measure what it intends to measure based on objectives of the study. Due to this, the questionnaires that were sent out were discussed by the researcher with the respondents. The researcher gave explanation to the respondents before they answer the questionnaires. This was purposely done to achieve data reliability.

Method of data analysis

Data and information collected will be analyzed using different statistical techniques such as percentages and tables, etc. Research question will be answered to see the Local Government Autonomy in Nasarawa State, Nigeria.

Presentation and discussion of result

In carrying out the research, a total of four hundred 400 questionnaires were sent out to the respondents. The four hundred (400) questionnaires that were answered are found useful and relevant in the study, constituting a 100% return of the entire questionnaires presented.

After a thorough and careful reading, and conducting a computerized statistical analysis of my finding, the following was revealed, as shown in a frequency table for the reader's understanding. Therefore, data gathered and collected during the study shall be analyzed and interpreted using tabular form, percentages, and frequencies. Hence, the various questions asked and their respective responses are itemized below:

Data presentation and analysis

Table 3. Respondents bio-data

Age	Frequency	Percentage
18–25	109	27.25
26–32	103	25.75
33–39	151	37.75
40–46	22	5.5
47–53	13	3.25
54–60	2	0.5
Total	400	100
Gender	Frequency	Percentage
Male	298	74.5
Female	102	25.5
Total	400	100
Marital Status	Frequency	Percentage
Married	308	77
Single	34	8.5
Divorcee	32	8
Widow/Widower	26	6.5
Total	400	100
Salary Grade	Frequency	Percentage
1–4	71	17.8
5–8	44	11
9–12	182	45.5
13–16	103	25.8
Total	400	100
Occupation	Frequency	Percentage
Business	32	8
Farming	69	17.3

Teaching	72	18
Students	13	3.3
Civil Service	189	47.3
Others	25	6.25
Total	400	100

Source: field survey, 2022.

As shown in Table 3 above, the ages of respondents were as follows: 27.25% are between 18–25, 25.75% are between 26–32, 37.75% are aged between 33–39, 40–46 are 5.5%, 47–53 are 3.25%, and the remaining 0.5% are aged 54–60 and above. This shows that majority of the respondents are between the ages of 33 and 39. It can be concluded that the research received response from all adult categories in the study area.

Regarding the sex distribution of the respondents, out of the 400 respondents, 366 (96.3%) were males, while 14 (3.68%) were females. This implies that majority of respondents are males, although the views of females were not left out.

The table further shows that 439 respondents (51.2%) are married, 395 respondents (46.0%) are single, 14 respondents (8.5%) are either widows or widowers, and 32 respondents (8%) are divorcees. Additionally, 44 respondents (11%) are within the salary grade level 5–8, 182 respondents (45.5%) are between grade level 9–12, 71 respondents (17.8%) are within grade level 1–4, and 103 respondents (25.8%) are with grade level 13–16.

In terms of occupation, the table shows that 47.3% are civil servants, 8% are engaged in various types of businesses, 17.3% are into farming, 18% are teachers at various level, 3.3% are students, and 6.25% are in different occupation such as artisan like mechanics, tailoring, driving, barbers, etc. Therefore, the majority of respondents are business persons.

Table 4. Respondent's familiarity with the concept of "Local Government Autonomy" in the practice of Nigerian Federalism

Are you familiar with the concept of "autonomy"	Frequency	Percentage
Yes	364	91
No	21	5
I don't know	15	3.75
Total	400	100

Source: field survey, 2022.

From the above Table 4 shows that 364 (91%) of the respondents are familiar with the concept of "autonomy", while 21 (5%) are not familiar with it. Additionally, 15 (3.75%) went for the "I don't know" option. This result indicates that the issue of "autonomy" in the practice of Nigerian federalism have become a general phenomenon among Nigerian citizens.

Table 5. Distribution of respondents on whether the non-adherence to established fund control mechanism by local government officials affects the efficient management of funds within the local government system

Item	Question	S.A	A.	S.D	D	Total
1.	Do you agree that the local governments in Nasarawa State are financially equipped to meet the basic needs of the people?	37 9.25%	74 18.5%	183 45.8%	106 26.5%	400 100%
2.	Do you agree that local government use of State Joint Local Government Account funds has had a negative impact on the development initiative of the rural areas in Nasarawa State?	41 8.0%	79 11.5%	107 35.8%	173 44.6%	400 100%
3.	Do you agree that over dependence on oil as source of revenue to Federation Account has had a negative impact on the development initiative of the rural areas in Nasarawa State?	35 8.75%	75 18.75 %	114 28.5 %	176 44%	400 100%
4.	Do you agree that the local governments in Nasarawa State are financially accountable?	39 9.75%	45 11.25%	101 25.25%	215 53.75%	400 100%
5.	Do you agree that poor management of funds has impacted negatively on the development initiative of the rural areas in Nasarawa State?	156 39%	154 38.5%	49 12.25%	41 10.25%	400 100%
6.	Do you agree that the lack of accountability is not a contributory factor to the high incidence of corruption in Nasarawa State local government system?	151 37.75%	149 37.25%	45 11.25%	55 13.75%	400 100%

Source: field survey, 2022.

From the above table, it is clear that 9.25% and 18.5% of the respondents strongly agreed and agreed, respectively, that local governments in Nasarawa State are financially equipped to meet the basic needs of the people. However, 45.8% and 26.5% disagreed and strongly disagreed, respectively, that local governments are financially equipped to meet the basic needs of the people.

Item 2 on the above table revealed that 8.0% and 11.5% respondents, respectively, disagreed and strongly disagreed that use of State Joint Local Government Account funds has impacted negatively on the development initiative of the rural areas in Nasarawa State, while 35.8% and 44.6% had contrary views, as they disagreed and strongly disagreed on this issue raised.

From item 3, it was the view of 8.75% and 18.75% respondents, respectively, who disagreed and strongly disagreed that that over dependence on oil as source of revenue to Federation Account has impacted negatively on the development initiative of the rural areas in Nasarawa State. 28.5% and 44% had contrary views, as they expressed agreement and strong agreement.

Item 4 revealed that 9.75% and 11.25% of the respondents strongly disagreed and disagreed that local governments in Nasarawa State are financially accountable, while the remaining 25.25% and 53.75% of the respondents strongly agreed and strongly agreed, respectively, that the local governments in Nasarawa State are financially accountable.

In item 5 of the above table, 39% and 38.5% of the respondents strongly agreed and agreed, respectively, that poor management of funds has impacted negatively on the development initiative of the rural areas in Nasarawa State, while 12.25% and 10.25% disagreed and strongly disagreed, respectively, with the view earlier expressed. Item 6 revealed that 37.75% and 37.25% of the respondents agreed and strongly agreed respectively that the lack of accountability is the major cause of corruption within the local government system in Nasarawa State, while the remaining 11.25% and 13.75%, respectively, disagreed and strongly disagreed with the aforesaid notion.

Table 6. Distribution of respondents on whether the efficient management of local government funds has as a positive relationship with the development of local government areas

Item	Question	S.A	A.	S.D	D	Total
1.	Do you agree that rural development can only be guaranteed when there is effective management of local government funds?	97 24.25%	194 48.5%	32 8%	77 19.25%	
2.	Do you agree that lack of abolition of State Joint Local Government Account is not responsible for the lack of social infrastructure in the local governments?	38 9.5%	51 12.75%	146 36.5%	166 41.5%	
3.	Do you agree that poor accountability in the local government system is the major reason for the deteriorating living conditions of the people of Nasarawa State?	67 16.75%	89 22.25%	103 25.75%	141 35.25%	
4.	Do you agree that the ineffectiveness of most of the local governments in Nasarawa State is due to underfunding?	31 14.0%	48 18.4%	271 31.6%	309 36.0%	
5.	Do you agree that local government would be effective in delivering their responsibilities if they are well equipped financially?	56 14%	74 18.5%	159 39.75%	111 27.75%	
6.	Do you agree that significant improvement is being made in the development of the local government areas in Nasarawa State?	72 18%	86 21.5%	103 25.75%	139 34.75%	

Source: field survey, 2022.

From the above table, it is clear that 24.25% respondents and 48.5% respondents agreed and strongly agreed, respectively, that rural development can only be guaranteed when there is

effective management of local government funds. However, 8% and 19.25% of the respondents, respectively, disagreed and strongly disagreed with this notion.

Item 2 from the above table indicates that 9.5% and 12.75% respondents agreed and strongly agreed that bad management of local government funds is responsible for the lack of social infrastructure in the local governments. However, 36.5% and 41.5% of the respondents expressed contrary views.

Item 3 from the table revealed that 16.75% and 22.25% respondents, respectively, agreed and strongly agreed that poor accountability in the local government system is the major reason for the deteriorating living conditions of the people of Nasarawa State while 25.75% and 35.25% of respondents, respectively, disagreed and strongly disagreed with this perception.

Item 4 shows that 14.0% and 18.4% of the respondents disagreed and strongly disagreed that the ineffectiveness of most local governments in Nasarawa State is due to poor management funds while 31.6% and 36.0% of the respondents, respectively, agreed and strongly agreed with this view.

Item 5 revealed that 14% and 18.5% of the respondents agreed and strongly agreed that local government would be effective in delivering their responsibilities if they are well equipped financially, while 39.75% and 27.75% respondents, respectively, disagreed and strongly disagreed with the view earlier expressed.

Item 6 indicates that 18% and 21.5% respondents, respectively, disagreed and strongly disagreed significant improvement is being made in the development of the local government areas in Nasarawa State. However, 25.75% and 34.75% of the respondents, respectively, agreed and strongly agreed that significant improvement is being made to develop the local government areas in Nasarawa State.

Summary of major findings

Investigating control mechanism and the management of local government funds in Nigeria, with Nasarawa State as a case study, this study revealed that:

- i. The internal control mechanisms put in place to enhance financial accountability are not adhered to by local government officials in the discharge of their duties. Section 7, Schedule 4 of the 1999 Constitution guarantees the statutory funding of local governments. Section 7(1) emphatically mandates the government of every state to make provisions for the financing of local government councils of the state.
- ii. Local government funds are dwarfed by poor financial management, inadequate budgeting, improper accounting system, and the lackadaisical attitude of accounting officers.
- iii. Local government internal control mechanisms are constrained by poor supervision, harsh socio-economic conditions, biting inflation, and sapping conditions. Lack of financial accountability in the local government is occasioned by unpublished audited accounts, the nature of the nation's political economy, inequality, poverty, and corruption. Local governments in Nasarawa State are financially equipped to meet the basic needs of the people.

- iv. Local governments in Nasarawa State are not financially accountable as funds are not duly utilized for the purpose they are provided. Poor management of funds has negative implications on local government development initiatives.
- v. Lack of accountability is largely responsible for the surge in corruption in the local governments in Nasarawa State.
- vi. Rural development can only be accelerated through the effective management of funds by local government authorities.
- vii. Ineffective management of funds is responsible for the dearth in social infrastructure in the local governments. Poor accountability negatively impacts on the living conditions of the people.

Conclusion

The provisions in the Constitution that dictate the power and financial relationship between the various tiers of government, especially the State and the local government, are deliberate. They are made to serve as checks and balances and ensure transparency, accountability, and equitable distribution of national wealth to the federating units, among other objectives, thereby bringing even development to the federation. Since the 1976 reforms, however, the councils have been grappling with a plethora of problems, relating in large measure to the delimitation of their fiscal jurisdiction and protection of their revenue rights. There has also been a severe erosion of their fiscal autonomy. These, combined with other institutional and structural problems, have rendered them functionally impotent in the areas of revenue allocation and effective service delivery. It is therefore obvious that for any meaningful development to take place at the local level, the States need to recognize the local government as partners in progress. That is, partners in enhancing sustainable rural development through the provision of essential services to improve the standard of living of the rural populace. And this cannot be without adequate financial resources at the disposal of the local government. Due to the imperativeness of local government in efficient service delivery, it becomes necessary that adequate fund should be provided for them and the fund available effectively managed. In order to achieve efficient financial management, local governments should engage in long-term financial planning, use appropriate budgetary system, and have an assured tenure of their leadership. To preserve the status of local government as the third tier of government and forestall the suffocating controls by higher tiers, there should be constitutional amendment to that effect, especially Section 7 (1–6) of 1999 Constitution.

Recommendations

Based on the findings of this study, the following recommendations are made;

- i. The welfare of workers should be improved upon by increasing their salaries and wages and other benefits offered as rewards in exchange for their services. This would go a long way in ensuring that their needs are well taken care of.

- ii. There should be efficient machinery put in place to monitor and supervise the utilization of local government funds, as this would, to a large extent, enthrone financial accountability and infrastructure development.
- iii. The affairs of local governments should be investigated by the federal and state governments on a regular basis so as to ensure strict compliance to the rules of the Revised Financial Memoranda.
- iv. Proper documentation of income and expenditures of funds should be ensured, as it would serve to minimize arguments that could possibly arise from unbalanced accounts.
- v. The federal and state governments should enact a law to guide the compliance of the Financial Memoranda by local government officials. Failure to comply with the financial memoranda should attract sanctions such as sack or suspension.
- vi. Popular participation of the people should be encouraged as this would go a long way in keeping local government functionaries on their toes. An enlightened population would be concerned about the operations and success of the local government, considering the enormous effect such would have on their lives.
- vii. Local government authorities should embark on periodic workers' training and orientation on the rules in the financial memoranda and the reasons for compliance. This can be carried out through seminars, workshops, and conferences.
- viii. Emphasis should be laid on recruiting well-competent and trustworthy officials in the local government.

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Gender disparity and academic performance among the undergraduates of Fountain University, Osogbo

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Abstract

Historically, women are perceived to have been relegated to the second fiddle positions in social schema, especially in cultures where patriarchy predominates. Since the Industrial Revolution in England, women have taken it upon themselves to liberate their kind in all facets of human engagements. This determination, therefore, necessitated the proliferation of various groupings for women's liberation. One crucial means adopted for achieving this objective is to acquire Western education, a potent strategy often used to break barriers of real and perceived oppression by men. They 'wrestle' power from men and now take charge of most aspects in which men hitherto reigned supreme. This study was spurred by the trend of female students leading in academic performance in public and school examinations. A survey of the academic performance of Fountain University students for four years was carried out with a specific focus on gender performance. Senior Secondary School Certificate examination results, final results of graduating students, library attendance and Students' Disciplinary Committee reports were examined. Interview sessions were conducted

with six (6) parents (IDIs) and five (5) school officials (KIIs). These were complemented with ten (10) Focus Group Discussions (FGDs) with students. Radical Feminist Theory was employed to provide explanations on the study's findings, which were content analysed.

Introduction

Education is a series of progressive activities that facilitate learning or the acquisition of skills, knowledge and values. It is the process in which individuals' capacities and potentials are developed to be successful in a specific culture or society (Goni, Ali & Bularafa, 2015). In this regard, education serves mainly as a function of individual development. Education starts right from birth and continues throughout life. In any society, providing education is fundamental for human resource development. Education, in its broadest sense, is a process designed to inculcate the knowledge, skills, and attitudes necessary to enable individuals to cope effectively with their environment (Goni et al., 2015; Joseph et al., 2015). Its fundamental purpose is to promote the most total individual self-realisation for all people. With the recognition of education as a veritable key to individual and national development, the rate at which people tend to clamour for education has increased (Quadri & Olowo, 2013).

In any educational system, the learning outcome is determined by assessing performance. The basis of certification is not only for its usage in entering the labour market but also for horizontal and vertical mobility. Learning outcomes are evaluated to determine what has been learned and make decisions regarding candidate selection for higher studies or job placement (Hughes, 2017). As described by Trucchia et al. (2013), "student academic performance is associated with psychological well-being, feeling of satisfaction with achievements, and coping with stressful situations". According to Huang et al. (2021), academic performance is "a quantifiable indicator of learning gain and is affected by factors like student engagement, social, geographic and demographic characteristics". It is characterised by students' performance on coursework and other types of examinations or assessments (Kyoshaba, 2009). Students' academic performance is a measure of how the student has performed for a period in the academic parlance. It can be measured as semester-based, session-based or throughout the duration of the course of study (Aisida, 2021). One of the most common and effective barometers of measuring students' academic performance is the grade attained from examination (Nwokocha & Amadike, 2005). Indisputably, students' academic performance always differs even though they are in the same educational setting. The performance difference has been associated with many factors, such as social, psychological, economic, environmental, and personal factors (Irfan & Shabana, 2012).

In recent times, gender differences in academic performance have been one of the contemporary issues worldwide (Abdu-Raheem, 2012). Several researchers have attempted to define and even conducted studies on gender as a factor in academics. For instance, Flynn (2012) described gender as "the range of physical, biological, mental and behavioural characteristics about and differentiating between masculinity and femininity". In common usage, gender refers to the sexual

distribution between males and females. However, social scientists refer to the term as a social construction rather than a biological phenomenon (Leonard, Benjamin & Sagary, 2011). Gender is a social construct that differentiates men from women in a society as they assume their social roles (McSweeney et al, 2016). According to Labey (2003), gender is a psychological experience of being a male or female. Unlike sex, which has to do with only the distinction between male and female based on biological characteristics, gender encompasses other personality attributes such as orientation, roles, and identity-based on an individual's self-conceptualisation. For example, Singh (2010) opines that gender is a sociocultural construct that entails the differentiated roles and responsibilities of men and women in a specific society. Singh's opinion implies that gender determines an individual's position in a particular society's cultural, social, political, and economic system. The sociocultural difference between men and women is the crucial reason for examining academic performance concerning gender.

In Nigeria, remarkable strides have been made towards achieving gender mainstreaming in education over the past years. Such effort is reflected in the gender mainstreaming office's introduction in some institutions to increase awareness of gender issues. Although there is a typical traditional stereotypical belief about women's academic performance that women seem to work less hard than men and that female students achieve lower grades in school in general. However, research has shown that women perform better than men in specific settings, while men outperform women in other aspects (Kisigot, Ogula & Munyua, 2021; Parajuli & Thapa, 2017; Oluwagbohunmi, 2014). However, Hartley and Sutton (2013) reported that boys develop gender stereotypes where girls are perceived as academically superior regarding motivation, performance, and self-regulation.

As a consequence, more girls achieve the general qualification for university entrance. Gender disparity in academic performance has been investigated for some time, resulting in substantial literature. However, there is inconsistency among all the studies as some researchers found insignificant gender disparity in students' academic performance. In contrast, others found significant differences, with either males or females performing better. On this basis, this proposed study intends to investigate further gender disparity in students' academic performance at Fountain University, Osogbo.

Statement of problem

The world has become increasingly competitive, and the quality of academic performance has become a key factor for personal progress. This has put considerable pressure on students, parents, teachers, schools, and the educational system. The educational system generally revolves around academic performance, although other outcomes are also expected. Consequently, a significant amount of time and effort from schools are being used to assist students to achieve better academic performance. In Nigeria, the problem of students' poor performance has been a major educational issue. Nevertheless, It becomes logical that while attempting a solution to any problem, it is crucial to understand the predisposing factors to such a phenomenon. That explains why scholars have tried to unearth the factors leading to poor student performance. Very critical in

this regard, among other factors, is gender disparity, which is significantly linked to academic performance. Many studies carried out worldwide among students at different levels of education found a significant gender difference in academic performance. Several studies reported that female students outperform their male counterparts (Parajuli & Thapa, 2017; Khwaileh & Zaza, 2010; Orabi, 2007), while other studies observed males passing more than females (Kisigot, Ogu-la, & Munyua, 2021; Nnamani & Oyibe, 2016). On the other hand, some studies did not observe significant gender differences in academic performance (Joseph et al., 2015; Goni et al., 2015). Not minding the contradictions in research outcomes, facts exist to establish that differences in performance are majorly influenced by some underlying factors (Parajuli & Thapa, 2017; Oyibe & Nnamani, 2016). It is in response to the need to identify the underlying factors that this study has examined the influence of gender disparity on the academic performance among Fountain University Osogbo students in Osun State, south-western Nigeria.

Research questions

The study intended to provide answers to the following research questions:

- i. Are there gender differences in academic performance of students in the chosen study area?
- ii. What factors influence gender differences in academic performance of students, if any is observed?
- iii. To what extent does academic performance influence access to employment opportunities in the study area?

Theoretical framework

Based on gender disparity in students' academic performance, this study is guided by Radical Feminist Theory (RFT). Thus, RFT is a perspective within feminism that calls for a radical re-ordering of society in which male supremacy will be eliminated in all social and economic contexts, while recognising that women's experiences are also affected by other social divisions such as race, class, and sexual orientation. RFT was originated in the 1960s (Willis, 1987). It sees patriarchy (male dominance) as the most pressing issue for women. While examining the cultural reproduction of patriarchy in several publications, Splender (1982), in her 'Invisible Women', exposed the negative impacts of education on the womenfolk. To her, patriarchal assumptions were embedded in both formal and hidden curricula. Given its relevance to the labour force, the feminists viewed the educational system as a patriarchal institution dominated by men.

As RFT argued, education is only a first step toward becoming a leader in the future work-force. In their view, gender differences still characterise school subject selection (Colley, 1998). According to Heaton and Lawson (1996), the 'hidden' curriculum is a significant source of gender socialisation. Spender (1982) believes that teachers give different types of attention to boys and girls throughout the school; he claims that girls are praised for their appearance, good behaviour, and neat work. He investigated the argument of gender inequality in education further

and stated, “What is considered inherently interesting is knowledge about men.” Because men control the records and value system, it is widely assumed that men have done all the exciting things and made history, discoveries, inventions, and feats of skill and courage – according to men. We are led to believe that these are essential activities that can only be undertaken by men. And it is because of these that men’s activities dominate the curriculum (Spender, 1982).

Methodology

An exploratory approach was adopted as the design for this study because it offers an in-depth contextual reality and is helpful for organising research in a manner that will point out key elements of the research (Universal Teacher, 2017). Senior Secondary School Certificate examination results, final results of graduating students, library attendance and Students’ Disciplinary Committee reports were examined. Interview sessions were conducted with six (6) parents (IDIs) and five (5) school officials (KIIs). These were complemented with ten (10) Focus Group Discussions (FGDs) with students. Purposive sampling technique was used to select participants in the qualitative data gathering process. Data were obtained through In-depth and Key Informant Interviews guides alongside FGD notes. Content analysis was used to analyse the data gathered using a thematic analytical approach.

Findings

Gender difference and academic performance

The study investigated the influence of gender factors on the academic performance of university undergraduates in Oshogbo, southwestern Nigeria. The study revealed that students’ examination and continuous assessment scores constitute significant determinants of academic performance. Good scores translate to higher academic performance. Confirming this, a participant expressed that:

The main determinants of students’ performance include what a student scores in the exam, and for students to get good scores in exams, it means they must have done some serious studies. Seriousness and commitment to learning principles contribute. Lack of seriousness makes lazy students fail assignments, which is part of the criteria for making summative evaluations. Therefore, laziness contributes to academic failure and low performance (KII/M/Lecturer/Fountain University, 2022).

Another interviewee submitted that:

Students who pay much attention to their studies will pass exams. So, students need always to be confident in themselves. Yoruba proverb says, “Bi o ba ti duro ninu foto (photo) ni o ma ba’ ra e lojo ti foto ba jade”. Meaning, “how you pose for a picture determines your appearance in it.” In other words, whoever fails to prepare prepares for failure. Examinations are not magic. If you read to understand, you will pass; otherwise, failure will undoubtedly come your way (KII/F/Deputy Registrar/Fountain University, 2022).

The above views align with Akomolafe and Olorunfemi-Olabisi's (2011) observation that as a student progresses from admission to graduation, the quality of his educational performances would likely be influenced by a complex interaction of some critical elements such as personal, social, academic, and institutional factors. It has also been confirmed that serious commitment leading to good scores influence students' academic performances. Differences in performance were also observed between male and female students. This observation is in line with Mankumari and Ajay (2017), who noticed that significant gender differences exist in students' academic performance. The scenario may be due to variations in motivation and encouragement available across genders. Where one gender is more motivated than the other, this tends to have implications for differentials in academic performance. The above view was supported by a participant who observed that:

There are differences between students' academic performances across gender lines. In the past two years, the general observation is that female students perform better than male students across all the colleges (KII/M/Lecturer/Fountain University, 2022).

One of the participants in the FGD session remarked that:

There are differences between male and female performances in my department, and the disparity was a bit pronounced. Females perform much better than males in many courses in this department (KII/M/Senior Admin Officer/Fountain University, 2022).

An insight was offered by a participant who opined that:

Gender differences in academic performance depend on courses. Male students have been leading the class in some courses I have taken for the past few years, while female students excel in others. I do not, therefore, feel bold to conclude that one gender performs better than the other in academics (KII/M/Lecturer/Fountain University, 2022).

Another participant opined that:

Someone's gender might not have much impact on performance because an individual's background, school environment, and other related factors influence learning outcomes. But generally speaking, I observe that these days, females are doing better in some programmes or disciplines traditionally classified as male-dominated programmes. It was discovered that females perform brilliantly well, far better than males, in engineering; the same is noticed in medicine. So, gender may not have anything to do with academic performance. All depends on individuals' socio-environmental, economic and cognitive attributes (KII/M/Lecturer/Fountain University, 2022).

Inconsistencies seem to characterise research outcomes on gender disparities in academic performance across various investigated higher institutions. For instance, Umar, Yagana, Alli, and Muhammed (2015) found no significant differences in gender composition and students' academic

performance. That, therefore, shows a weak correlation between gender and academic performance between male and female undergraduates. This observation was also supported by the works of several other scholars (Puju & Netragaonkar, 2014; Okafor, 2011; Farhan & Khan, 2015; Goni et al., 2015; Nez-Pea & Suárez-Pellicioni, 2016). On the other hand, Mankumari and Ajay (2017) discovered significant gender differences in students' academic performance. The female students were especially performing better than their male counterparts. This discovery corroborates several other studies which indicate that female students outperformed male students in academic performance (Obadaki & Omowumi, 2013; Zainal, Yahya & Rahman, 2014; Khan & Nawaz, 2012; Ahmad, Pervaiz & Aleem, 2015; Madara, 2016; Tarabashkina & Lietz, 2011). As Akomolafe and Olorunfemi-Olabisi (2011) discovered, female students seem more comfortable in social science disciplines and the English language than males, who are more grounded in natural science and mathematics. Justifying why some students could not get on well in academics, one of the participants observed that:

Male students may not do well in their studies because some are into cybercrime, commonly known as “yahoo-yahoo”; some watch films online while the challenges posed by social media cannot be over-emphasised. These take their time more than their studies and constitute significant constraints. It is not that they are not brilliant, but they have other things demanding their attention. If you ask some of them to name the players of notable European football clubs, they have responses at their fingertips. By this, they are not dullards; their focus is on less crucial other things (KII/M/Lecturer/FUO, 2022).

Factors influencing academic performance

Generally, the factors that influence students' academic performance are social, economic, psychological, technological and environmental. While underscoring the importance of school infrastructure to the academic performance of university undergraduates, the study equally identified parental support, peer group influence, learning facilities, the social media revolution, and ecological influences as critical influencers of teaching and learning. One of the participants at the FGD session submitted that:

If the learning environment is conducive, it enhances students' performance, but if not correctly positioned, students might struggle to grasp what the lecturer says. Also, ‘monotony, they say, kills interest. To be running unreasonably long periods of learning also hampers good performance. The longer the period, the more the tendency to develop stress and fatigue (FGD/F/Student/CONAS/2022).

Another participant reiterates that:

School infrastructure is affecting how students fare in their studies. For example, students cannot read comfortably in the library where facilities are not available or where none exist at all. They would be forced to read in their room, which may not be conducive to academic work (KII/M/Parent/Osogbo, 2022).

A middle-aged female participant agreed that:

Generally, school infrastructure facilities previously affect learning outcomes. Therefore, if the school doesn't have the necessary facilities to assist in reading and learning, students might not gain the intended knowledge (KII/F/Lecturer/ FUO, 2022).

Supporting this view, another participant opined that:

Students comfortable with the learning environment will concentrate more on their studies. This indicates that having access to state-of-the-art facilities and a learning-friendly climate promotes effective learning. A conducive environment equally encourages good reading habits. These, combined, significantly enable good academic performance (FGD/F/Students/Fountain University, 2022).

The preceding underscores the importance of the learning environment in academic performance, as inadequate lecture rooms and facilities are detrimental to effective learning. In addition to what a conducive learning environment can offer, participants mentioned tutorial attendance, finances, lecturer quality, peer influence, teaching strategies, and parental or family background as other crucial factors enhancing good performance. A female participant underscored the significance of good academic relations and how this promotes better performance.

As she argued:

Tutorial attendance is among the key factors promoting academic performance simply because not all students can get what lecturers say in class. Moreover, the tutorial is helpful as it enhances academic performance (FGD/M/Student/Fountain University, 2022).

The role of finances in learning also cannot be over-emphasised. As submitted by a participant:

Students' financial capability could also affect their academic performance. If a student is not strong financially, how will such a student cope with learning? Low financial capacity distorts smooth thought flow; this is not good for learning (FGD/M/Student/Fountain University, 2022).

Beyond ecological and economic factors, psychological influences were also noted to be playing substantial roles in academic success. For instance, a female participant said:

My parents celebrate all my wins. No matter how small the achievement is, it always attracts encouragement from them. The bigger the win, the bigger the gift that accompanies it. They do this to encourage us as children, and I am always motivated to work harder (FGD/F/Student/2022).

Another female participant was of the view that:

Besides financial support, moral support is the best parents can give their children as students. If a student does not perform well, parents must provide requisite encouragement instead of uttering negative statements. This helps the student to build more confidence (IDI/F/Student, 2022).

In the opinion of a male participant:

Parents should be closer to their children or wards in school by paying routine visits to show their love and support to them, given the challenges of cultism and sexual harassment that are common in schools these days (IDI/F/Student, 2022).

The preceding underscores that parental support is vital to higher academic performance, as parents play crucial roles while their support influences students' performance. This presumption agrees with Akomolafe and Olorunfemi-Olabisi's (2011) observation, which indicates that stakeholders in the Nigerian educational system, including parents, guardians, lecturers, family members, counsellors, and others, are very concerned about students' academic achievements and standards.

The consequence of psychological factors and low financial capacity is in line with Tenaw's (2018) finding that female students' academic achievements are lower than that of males due to low self-perception and sexual harassment, which economic problems may warrant. Parental support or lack of the same do influence students' academic performance. Almost all the participants agreed to this position. The works of Afzal, Ali, Khan & Hamid (2010) also concluded that student motivation and academic performance have a direct relationship, with more motivated students performing better and a student with better performance always becoming more motivated.

Issahaku (2017) explained how social factors influence educational success. He maintained that the time students spend reading correlates firmly with their academic achievement. Most participants also agreed that peer groups negatively and positively affect students' performance. In the thinking of a participant:

Peer group remains one of the key factors determining performance because sometimes one needs to be very serious. Otherwise, people around you can make you feel like you are doing too much, and if you succumb and relax, you will face the consequences. Each must understand themselves and devise appropriate reading strategies (FGD/F/Student, 2022).

Another participant agreed that:

Peer groups influence students' performance because those you consider your friends determine what you do and what you experience most of the time. If your friends do not believe in reading and hard work, you may share their beliefs willingly or otherwise. Likewise, if they value good academic performance, you will be influenced (FGD/F/Student, 2022).

Silva and Hill (cited in Kheswa, 2014) previously alluded that the absence of peer trust affects students' concentration and diminishes performance. The effects of peer influence could, however, be positive or negative. Thus, peer groups with positive goals may yield positive academic performance and vice versa. While this has been an age-long truth, there is a threshold where different students have sundry influencers that shape their personalities. The advent of modern technology, especially the onset of the social media revolution, has also contributed to students'

academic performance. All the participants agreed that social media also positively and negatively affect students' academic performance depending on the information sought. A participant expressed that:

Social media has helpful and adverse effects depending on what you use it to achieve. For example, you will gain a lot if you use it to search academic or educative materials and other valuable information. Today, all helpful information is at your fingertips because of the internet revolution, unlike when you physically need to approach the library for hard copies of academic material. In most cases, however, many use internet resources uncontrollably in a damaging way, especially for entertainment, non-academic, and immoral purposes. Such usage could hinder academic performance (FGD/M/Student/Fountain/University, 2022).

The bottom line is that social media has good and bad influences. The outcomes depend on what you deploy it to achieve. In politics, business and commerce, entertainment, industry, and entrepreneurship, social media have been of tremendous help. However, the most valuable gains lie in its deployment for educational advantage. The findings underscore how powerful social media are and their impacts on students' academic performance.

Academic performance and access to employment opportunities

One of the participants refuted the age-long belief that good academic performance guarantees employment opportunities in Nigeria. He further explained that:

The only thing that guaranteed employment is who you are or who you know. Someone who graduated with an ordinary Pass could secure a job ahead of somebody who got a first-class if the latter is not 'strongly connected'. Likewise, if people with first-class can prove their mettle, particularly in private organisations, they can get good jobs as well, but it is not that easy. Apart from academic qualifications, one should acquire a semi-formal education to provide additional skills and competencies. Such skills can add much value to the certificate at hand. For instance, most of our accounting students are trying to learn one thing or the other quite distant from their profession, which is not in the curriculum of their academic programme. This will surely be an added advantage to them (KII/M/Lecturers/Fountain University, 2022).

Another participant also reiterated that good academic performance does not guarantee employment opportunities and that other factors should be considered while seeking employment. According to the participants, these include:

Connections, skills on demand and other assets. Schools are only to prepare the students, but the need to excel outside the four walls of school may be beyond academic excellence (KII/M/Senior Administrative officer/Fountain University, 2022).

This submission agrees with Fadokun (2009), who submits that schools are established to impart knowledge, and global institutions have come to be recognised as centres of knowledge

accumulation and transfer, with students being the most crucial asset for any educational institute. Students are, therefore, tasked to explore and learn more while they do not relent on good academic performance alone.

Conclusion

This study examined the influence of gender on academic performance among undergraduates of Fountain University, Osogbo. Some measures of inconsistency were noticed to have characterised outcomes of previous research measuring the impacts of gender disparities on students' academic performance. While some agreed that gender disparity exists, others considered it a myth. As discovered by this study, that there exist gender disparity in students' academic performance cannot be over-emphasised and is highly pronounced. Female students were discovered to have outperformed their male counterparts in virtually all academic programmes, including those generally classified as male-concentrated ones. Factors identified as having influenced academic performances included personal commitment on the part of the students, self-driven or externally induced motivation, parental supports, peer pressure, school infrastructure, advancement in technology, etc. Gender difference seemed not to have produced much impacts on career choice as students across genders chose courses of study based on personal desires, as different from gender consideration. The results also show that access to job opportunities is not solely guaranteed by high academic performance as far as Nigeria is concerned. Thus, factors influencing access to job opportunities in Nigeria include use of personal disposition, social networking, possession of relevant knowledge and skills etc.

Recommendations

In line with the key findings of this study, the following recommendations were advocated for:

- a) Parents and stakeholder in education should encourage their children and wards to excel in their studies; they should monitor their performance and motivate them toward excellent performance.
- b) Appropriate institutional changes and affirmative action are required to meet women's life improvement and gender balance demands.
- c) The government should increase students' access to scholarship or loan schemes to encourage excellence in academic activities.
- d) Lecturers and counsellors should assist students of both genders through rational emotive counselling for them to make necessary adjustments.

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Interpret the political ideology of Taiwan independence as Beliefs in a State's Human Ecosystem

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Keywords Human Ecosystem, Taiwan independence, political ideology, belief, Taiwanese identity

Abstract The Human Ecosystem is defined “as a coherent system of biophysical and social factors capable of adaptation and sustainability over time” (Machlis et al., 1997). This social-ecological model consists of two portions: Critical Resources (Biophysical Resources, Socioeconomic Resources, and Cultural Resources) and Social Systems (Social Institutions, Social Order, and Cycles). In the Human Ecosystem, ‘Beliefs’ is a variable of Cultural Resources, which is one of three Critical Resources. As a representative of ‘Beliefs’ in Taiwan’s human ecosystem, the political ideology of Taiwan independence is selected as a case study. The quantitative study uses the content analysis method with literature studies on Taiwan’s politics, especially, on the issues of Taiwan independence are the main sources of data. The Human Ecosystem Model is adopted as the main analysis tool to take a new exploration of how the political ideology of Taiwan Independence integrates, manifests, and functions in Taiwan’s human ecosystem.

The study suggests that land, population, and political subsystems are the main variables that integrate the political ideology of Taiwan independence. Also, the study proposes that there is a visible relationship between beliefs and identity. Consequently, Taiwan’s social institutions such as government, education, security, and defence are forced to interact according to the rise of the political ideology of Taiwan independence. Besides, indigenous peoples’ governance focuses on solidifying the territorial and cultural background, which significantly strengthens the political ideology. The initial findings suggest that indigenous peoples’ territories, cultural resources, and ideological security are key variables to solidify the political ideology of Taiwan independence.

Introduction

Beliefs in the Human Ecosystem Model

Originally, the Human Ecosystem is defined “as a coherent system of biophysical and social factors capable of adaptation and sustainability over time” (Machlis et al., 1997). This social-ecological model consists of two portions – *Critical Resources* and *Social Systems* – which integrate the social ecology system by six key components (Biophysical Resources, Socioeconomic Resources, Cultural Resources, Social Institutions, Social Order, and Cycles). Each component comprises several variables, such as land, nutrients, and flora & fauna (biophysical resources); information, population, and capital (socioeconomic resources); belief, myth, and organization (cultural resources); justice, governance, and security (social institutions); identity, social norms, and hierarchy (social order); and individual, institutional, and environmental (cycles). Besides, the flows (individuals, energy, nutrients, materials, information, and capital) move constantly from a human system to another human system that creates the sustainability of social-ecological units such as family, community/village/ town, county/province/city, region/area, nation, and the planet (Machlis et al., 1997).

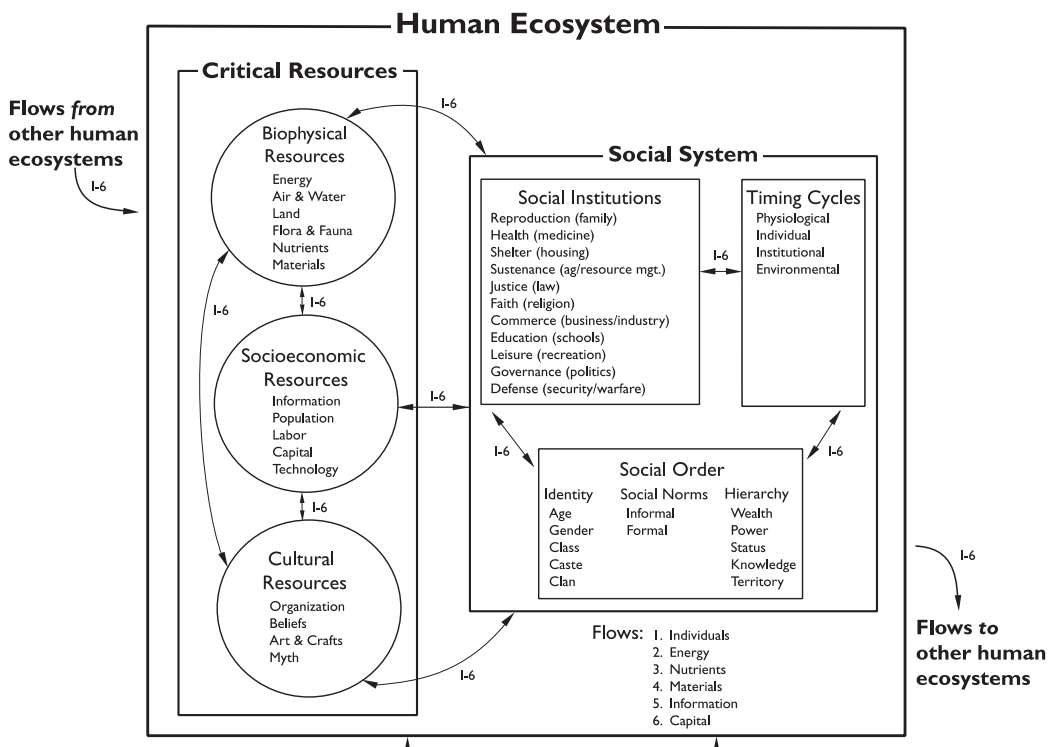


Figure 1. The Human Ecosystem Model

Source: Burch, Machlis, Force (2017).

Theoretically, the model provides a “strong conceptual basis as a social-science framework for an integrated social and biophysical” (Wang et al., 2011). The Human Ecosystem Model has been applied not only to ecological issues such as agricultural land use, soil erosion control, and pollution but also to social issues such as warfare, revitalizing communities, and environmental social movements (Wang et al., 2011; Machlis et al., 1997; Dalton, 2010).

In the Human Ecosystem, “Beliefs” is a variable of the *Cultural Resources* component. It is identified as statements about reality that are accepted by an individual as true. Theoretically speaking, “Beliefs” plays a crucial role in the functioning of a human ecosystem because they force individuals, institutions, and social groups to make decisions to operate and maintain a specific human ecosystem. In particular, religion and politics (social institutions) in which beliefs’ indicators are strongly expressed. For example, beliefs were identified in the Catholic communities in New Brunswick, Canada, where the CFB Gagetown military base (Canadian Forces Base) was established (Dalton, 2010) or in the ratio of voting for political parties in The Upper Columbia River Basin, the U.S. (Force et al., 1997).

Research questions, hypothesis

The paper attempts to examine Taiwan independence through the lens of the human ecosystem. Theoretically, the concept of ‘Beliefs’ of the Human Ecosystem Model (HEM) is adopted to answer two key research questions: Can the HEM provide empirical insights to interpret the Political Ideology of Taiwan Independence? Second, how can this study suggest which variables in Taiwan’s ecosystem are important in solidifying the political ideology of Taiwan independence?

As a hypothesis, I propose Taiwan, a nation unit, can be treated as a human system in which the political ideology of Taiwan independence is considered as the variable of beliefs. In reality, there is an existing belief that Taiwan is moving toward independence status itself. Accordingly, the political ideology can be interpreted by three aspects relating to the variable of “Beliefs”: first, it is integrated by different resources of Taiwan’s human ecosystem including biophysical resources, socioeconomic resources and cultural resources; second, it can be measured by human ecosystem-based values, for instance, the proportion of the Taiwanese population that feels strongly about and share the same political belief about Taiwan independence; third, Taiwan’s social institutions such as government, education, justice, commerce and security might be forced to respond to the rise of it. In addition, there might be key variables in Taiwan’s ecosystem that are important in solidifying the political ideology of Taiwan’s independence and these variable should become a theoretical reference to policy implementation.

Study concepts and methodology

Beliefs, political ideology, the political ideology of Taiwan Independence

In my approach, political ideology is an official or unofficial political tendency of a country, which is the very foundation of the vitality of a particular political architecture and governance, as well as a social image that the people who support the political ideology desire for the present

and future of their country. It may be violated by infiltrating oppositional political messages from violent and non-violent activities.

Why particular political ideologies are chosen or found in the minds of certain individuals or groups but not others? The possible answer might be different beliefs among individuals and social groups within a certain territory. There are a considerable number of Taiwanese citizens who believe that Taiwan independence has been a true reality and security for their lives, careers, and for Taiwan since the Communist regime in mainland China has grown greater and firmer. On the other hand, a small number of Taiwanese citizens believe that China – Taiwan unification (one country, two systems) will be beneficial to Taiwan.

According to the Human Ecosystem Model, people's ideological tendencies are a key social indicator to measure the variable of beliefs. Among several definition concepts, "a set of beliefs" is a common term that has been used by scholars in existing literature to imply political ideology. The review study on political ideology's structure, functions, and electives by Jost et al. (2009) provided the basic definition of political ideology as "a set of beliefs about the proper order of society and how it can be achieved". Freedman (2001) offered that:

Political ideology is a set of ideas, beliefs, values, and opinions, exhibiting a recurring pattern, that competes deliberately as well as unintentionally over providing plans of action for public policymaking in an attempt to justify, explain, contest, or change the social and political arrangements and processes of a political community.

Similarly, Decker J.M. (2004) defined political ideology as "a set of beliefs that directly influences how societies react to variable conditions such as economic flux, militarism, technological progress, religious mandates, and the like".

Taiwanese independence is identified based on an argument that Taiwan possesses the criteria of an independent nation, e.g., independent government, having the ownership of territory, democratic elections, own constitutions, own flag, and the belief in the political ideology of Taiwanese independence (Su, 2006; Dittmer, 2004). In short, as in the previous concepts, the political ideology of Taiwan independence was a result of giving up the hope of regaining the rule of the whole of China that had been promoted by the Chinese Nationalist Party (KMT) government (Su, 2006) to reconstruct the Republic of China's regime in Taiwan's territory. Then, as the existing concept, the political ideology of Taiwan independence is an official political tendency in Taiwan, implying the independent status of Taiwan's territory, Taiwan's political regime and governance in relation to China as well as a belief in the status of intact independence for Taiwan internationally. It is opposite to the political ideology of China-Taiwan unification.

Methodology

In the study, I mainly employ the content analysis method to examine insights of Taiwan's human ecosystem. Content analysis is an available technique for political study; it helps to interpret "words" context, insights, phenomena, and practical actions (Downe-Wambolt 1992; Bengtsson, 2016; Krippendorff, 2018). The content analysis method of my study is primarily based on the research papers,

including literature articles and books related to Taiwan's political ideology, Taiwan independence, Taiwanese identity, Taiwanese indigenous, Taiwan's history and the Human Ecosystem Model's application. This will assist in explaining the Taiwan's human ecosystem insightfully, which is worthy to assess the function and manifestation of the belief in Taiwan independence.

In addition, I will analyze the Taiwan National Security Survey and the Public Opinion Survey "Public's View on Current Cross-Strait Relations" conducted by the Mainland Affairs Council, Election Study Center – National Chengchi University (Taiwan), and Taiwan Real Survey Co., Ltd.). The survey results might assist to measure the belief of Taiwan independence in Taiwan's human ecosystem.

Interpreting the political ideology of Taiwan independence – an application of the human ecosystem model

Land, political subsystem (governance) and population – The key variables of integrating the political ideology of Taiwan independence

According to the Human Ecosystem Framework and the development process of the political ideology of Taiwan independence, the changes in three variables of land (biophysical resources) population (socioeconomic resources), and political subsystem (social institutions) are a result of the political ideology.

Land (the Island of Taiwan and surrounding islands)

The political ideology of Taiwan independence is reflected in the question who is the legal owner of the land of Taiwan (e.g. the Republic of China or The People's Republic of China). Land can be characterized by ownership patterns. In human ecosystems, changes in land use are reflected in altered hierarchies of power and/or territory through shifts in land tenure and property rights (Burch et al., 2017). In reality, the land of Taiwan is a legal territory of the Republic of China (the Taiwanese government's administrative title) so the power of the Taiwanese government covers all the land of Taiwan including the Island of Taiwan and its surrounding islands such as Penghu, Kinmen, Matsu, and numerous other islets. Historically, China does not have original ownership of Taiwan. Particularly, Austronesian indigenous peoples have original ownership, then in the political context of the end of the 1890s, the ownership of China (the representative of Qing) expired, then replaced by the ownership of Japan by colonization (the representative of the Japanese Empire), and finally handed over to the Republic of China (after World War II). The shift in land use was a process from "Taiwan province" – the base to carry out strategies to reunify China by the KTM government in the martial law period to the independent territory of the Republic of China. The independent ownership of Taiwan's land has paved the way to identify and exploit Taiwan's independent socioeconomic resources and cultural resources and establish Taiwan's independent social institutions. Consequently, the ownership of the Taiwanese government and other social institutions in the territory of Taiwan is the most fundamental element to integrate the political ideology of Taiwan independence.

Political subsystem

Taiwan independence first had been insisted on by Taiwanese or early Chinese immigrants (before 1949) because they realized the impossibility of reunification (China – Taiwan) of two very different political regimes. Whereas, mainlanders (the immigrants from China – 1949) have preferred reunification for Taiwan's future (Su, 2006). The concept of Taiwan independence used to be rejected forcefully by the Chinese Nationalist Party (KMT) under the martial law period because they had a great ambition to gain authority over all of China and considered “Taiwan province” as the base to carry out strategies to reunify China in the future (Clark, 2001; Su, 2006). The political ideology of Taiwan independence has changed conceptually that demonstrates that the governance of Taiwan plays a key role in arising of the political ideology.

In the Human Ecosystem Model, the political subsystem (governance/government/politics) is a central component of social institutions and the human ecosystem. It is a result of numerous other components such as organization, justice, education, and beliefs. It includes the modes of interaction between political units, the process of decision-making within political units, and the participation of citizens in political actions. The changes in government action or process can have a significant influence on the human ecosystem (Burch et al., 2017). In the case of Taiwan, the changes in the government process have had a strong influence on the political ideology of Taiwan independence.

The political ideology of Taiwan independence was “ideologically constructed-by political leaders and governments – in terms of culture and/or ancestry” (Brown, 2004). It changed itself based on the different perceptions of governance in the territory of Taiwan. The history of governance in Taiwan could be divided into three periods: 1949–1975 (since the end of the one-party ruling period); 1975–1996 (the ruling of two progressive political leaders); 1996 to the present (the start of the direct presidential election). The changes in political regimes ignited the change in political ideologies in Taiwan. For instance, political identity in Taiwan changed significantly from the Chinese identity in the first period to the complete Taiwanese identity in the second and third periods. Especially, the dramatic democratization after 1975 conceived and gave birth to the political ideology of Taiwan independence (Su, 2006). Besides that, younger governors who were not attracted much by the political ideology of unification with Mainland China strongly supported the political competition domestically and the promotion of Taiwan Independence internationally (Dickson, 2001).

Population (Citizens of Taiwan)

The Taiwanese population had a significant impact on the rise of the political ideology of Taiwan independence. The characteristics (such as national identities and political perceptions) of Taiwanese people had a meaningful contribution to the political ideology of Taiwan independence. According to Human Ecosystem, the population includes both the number of individuals and the number of social groups and cohorts within a social system. Population as a socioeconomic resource includes the consumption impacts of people as well as their creative actions (Machlis et al., 2017). In simpler words, Taiwan's population is the core subject that creates political

ideologies with their beliefs. The history of “settler colonialism” on the island of Taiwan which embraces the stories of farmers, invasion forces, soldiers, and elites along with their next generations with their beliefs in Taiwan politics has weaved into the story of the political ideology of Taiwan independence.

The political ideology of Taiwan independence is mainly related to the identity of Taiwanese ethnicity (Lin, 2001; Brown, 2004). The new generations, who were born and grow up in Taiwan, do not have memories of mainland China or a sense of China's homeland. Consequently, their beliefs in Taiwanese identity and Taiwanese new culture (e.g. a mixture of Chinese culture, Austronesian Taiwanese, Western, and Japanese culture) have become spacious spaces for the political ideology of Taiwan independence to arise. For instance, the rise of the portion of Taiwanese people who identify themselves as Taiwanese increases about 46.1 percent, from 17.6 percent in 1992 to 63.7 percent in 2022¹. Besides that, the political ideology of Taiwan independence was relatively a consequence of the rise of the middle-class including business communities, technicians and Taiwanese elites who were Western-educated and influenced by democracy ideologies. This rise was pushed by the sharp development of socioeconomic changes and the increase of living standards. Thus, the Taiwanese middle class of significantly sped up the construction of Taiwan Independence (Clark, 2001; Dickson, 2001; Su, 2006). However, it's important to acknowledge that the political ideology of Taiwan independence came about as a result/consequence of the Taiwanese people's internal struggle and consciousness. This is to deflect the criticism that the political ideology of Taiwan Independence caters to Western interests.

Measure the political ideology of Taiwan independence

In human ecosystems, beliefs can be measured by their ideological content (conservative or liberal), their intensity (the proportion of the population that feels strongly about a belief), and their public acceptance (the proportion of the population that shares a similar belief) (Burch et al., 2017). In the case of Taiwan, the political ideology of Taiwan independence can be measured by the proportion of the Taiwanese population that feels strongly about a belief of Taiwan independence (Taiwan independence preference). For example, two long-term surveys – the Taiwan National Security Survey and the Public Opinion Survey ‘Public's View on Current Cross-Strait Relations’ – conducted by the Mainland Affairs Council, Election Study Center at Chengchi University, and Taiwan Real Survey Co., Ltd. have shown an increase in the proportion of Taiwanese citizens believing in the independence status of Taiwan in the last decades and rejecting the oppositional political ideologies such as unification ideology.

The latest result from the August 2022 survey shows that a majority of the Taiwanese public (86.1 percent) support Taiwan independence defined in a broader sense, meaning including maintaining Taiwan current status quo before moving to the next step of either independence or unification. Also, the survey displays that 6.4 percent of the public support independence as soon

¹ Taiwan National Security Survey dataset collected by the Election Study Center (ESC-NCCU) – National Chengchi University, Taiwan.

as possible in 2022. Notably, this rate has been relatively unchanged from 2016 (6.5 percent) since the Democracy Progressive Party (DPP) returned to office. Especially, the rate rose to a peak of 9.3 percent in 2020 when Tsai Ying-wen won the 2020 presidential election to maintain her presidency for a second term.

Furthermore, the August 2022 survey shows that the Taiwanese strongly disagree with China's unification – related arguments and strategies. Particularly, the survey reveals that 84.7 percent of the public disapproves of the Chinese Communist's proposal of "one country, two systems," which considers Taiwan as a local government under the rule of the China Communist Party and 82.1 percent of the public disagree "one China" principle, as the concept gradually undermines the independence status quo of the Republic of China. Additionally, of 1076 people polled, approximately 80 percent disapprove of the China Communist Party's claim that it will punish people who are identified as "Taiwan independence diehards" in accordance with China's laws and regulations. In the same way, the 2022 March survey verifies that nearly 85 percent of the public oppose China's "overall strategy for resolving the Taiwan issue," which promoted unification between the two sides of the Taiwan Strait

These results demonstrate that a high proportion of the Taiwanese population feels strongly about a belief in the political ideology of Taiwan independence and strongly opposes claims aiming to undermine Taiwan independence.

Based on the components and variables of the Human Ecosystem Model and the results of Taiwan independence preference, a relationship between beliefs (a variable of cultural resources) and identity (a variable of social order) is obvious. The proportion of Taiwanese citizens believing in the independence status of Taiwan considerably depends on their ages, gender, and especially clans (e.g. Chinese, Taiwanese, Indigenous, or mixed identities). For example, Mainlanders (the immigrant groups of the year 1949) preferred unification, whereas Taiwanese of early Chinese descent has favour of Taiwan independence (Su, 2006); the second generation of Taiwan population who were born in 1932 to 1953 preferred pursuing independence the most (Chang & Wang, 2005); In terms of gender, from 2012 to 2016, compared to men, women shifted from the lower rate of supporting the political ideology of Taiwan independence over the past 10 years to the higher rate. From 1992 to 2008, the rate of men supporting the political ideology of Taiwan independence was higher than whose women. Contrarily, from 2008 to 2012, the rate of women was higher than whose men. In 2016, the rate of women and men was almost the same, 31.06% and 31.15% respectively. The reason causes the difference between men's attitudes and women's attitudes toward the political ideology of Taiwan independence is that men and women think differently about the issue of the Taiwan Cross-strait.

How Taiwan social institutions respond to the rising of political ideology of Taiwan independence

The rise of the political ideology of Taiwan independence is considered as a significant change in the political history of Taiwan. Consequently, social institutions of Taiwan such as government, education, and security/defense are forced to interact accordingly.

The political subsystem's responses: Political party formation, cultural – communicational governance and Indigenous governance

The concept of Taiwan independence made a fundamental change in Taiwan's political history. Accordingly, independence verse unification has become one of the fundamental political ideologies by which parties in Taiwan identify themselves and attract voters and members (Noiu, 2004; Fleischauer, 2016). The political ideology of Taiwan Independence formed fundamentally the structure and charters of the Taiwan party system such as the rise of the Democratic Progressive Party (DPP), the reformation of the New Party, and the general goal of KMT (e.g. from regaining China to Taiwanisation). Other effects could recognize such as the political orientations of Taiwan's leaders, and the presidential election's results (e.g. the polls in 1996, 2000) (Clark, 2001). For instance, the Democratic Progressive Party (DPP) is strongly associated with the political ideology of Taiwan Independence which became the party's ideal, charter, and expectation, as well as the clearest identity of the party in the Taiwan political realm. This is a reason why the DPP is called an independence-leaning party. The political ideology has been much more prominent in Taiwan politics since the party got the first win in the 2000 presidential election (Clark, 2001; Su, 2006). In the past decades, therefore, the political ideology of Taiwan independence has been used as a political message by the DPP candidates to attract voters for their party.

As a result, Taiwan governance activities are also based on the political ideology of Taiwan independence. The political ideology of Taiwan independence has been threatened through cultural activities involved in the "China factor" such as mass communication, publishing, and political activities. From the Taiwan government's perspective, undermining the political ideology might be recognized by raising the "China Factor" in Taiwan media, art, and other propaganda. Accordingly, Taiwan's governance carried out measures such as the regulations of communication and culture, and diplomatic affairs as a means to limit the influences of China on the political ideology of Taiwan independence. For example, the Taiwan government stopped broadcasting 中天頻道 (Cti TV) or banned the Chinese (China) children's book 等爸爸回家書 (Waiting for My Father Coming Home) with arguments that these cultural products might seriously threaten the existence of the political ideology of Taiwan independence.

Indigenous governance is a specific affair in Taiwanese governance. Taiwanese indigenous people's rights are dealt with as a key point to promote and solidify the independent sovereign and the own culture of Taiwan. It is safe to conclude that the political ideology of Taiwan independence kindles the changes in Taiwanese indigenous policies. Because Taiwan indigenous peoples strongly relate to biophysical resources and cultural resources of Taiwan's human ecosystem, the indigenous governance would aim to protect their rights and justice for them. For example, improving hunting and gathering rights in the traditional territories of Taiwan's indigenous peoples (the August 2016 apology to indigenous peoples by President Tsai Ing-wen, the Indigenous Peoples Law, the Basic Law, etc.). Also, the government approved a plan (taking effect in 2022 May) to overhaul mining law, making the approval of local Indigenous peoples impact assessments mandatory for mining activities in the Indigenous lands. I can argue that that the

political ideology of Taiwan independence yields benefits in critical resource management (such as land management, flora & fauna management, and myths) by shortening Indigenous injustice.

The education's responses

Theoretically, political ideology affects the formation of the education system and school curricula. For example, the preeminence and social benefits of socialism occupy an important position in Vietnamese textbooks. Therefore, textbooks can still become ideological machines for the transfusion of political ideologies. Su (2006) urged that history, literature, and language are literacy tools used to effectively infiltrate political ideologies into a student's mindset. He (Su, 2006) also claimed that speaking, or not speaking a language, e.g. Taiwanese Hokkien language or Mandarin Chinese, could be supportive to build or perish a political ideology which relates to that language, respectively.

Based on the concept of the Human Ecosystem model, it is concluded that education as a social institution interacts productively with the rise of the political ideology of Taiwan independence. For example, before the rise of political ideology, the curriculum in the Taiwan education system focused on Chinese traditional values, literature, history, language and the ideology of (Mainland) China recovering. Moreover, Mandarin became the official language, whereas Taiwanese language, culture, and literature were not accepted in Taiwan's educational settings. Then, according to the prevalence of the political ideology of Taiwan independence, the school curriculum has changed to emphasize Taiwanese history, politics and society, Taiwan indigenous, and Taiwan cultural and ethnic diversity (ex. "Homeland Studies" course). This has educated Taiwanese students that Taiwan is a sovereign nation, independent from Mainland China (Su, 2006). In addition, there are some ideological orientations to sow the seeds of Taiwan independence in the young generation's mindsets, including consolidating democracy, teaching the young generation about the true values of democracy, the rights and obligations of a Taiwan citizen, and the beauty of Taiwan to purposely increase the consciousness of Taiwanese (Lin & Lin 2005).

The security and defense responses: Cross-strait crisis – Ideological security

The ideology of Taiwan independence has directly threatened the certain ideology of Taiwan – China reunification (Su, 2006; Hsu, 2014). Due to the historical connection between Mainland China and the island of Taiwan, the rise of the political ideology of Taiwan Independence has directly affected China's sovereignty and political power from the perspective of the PRC government. The political ideology of Taiwan independence does not change the political system and economic status quo of the People's Republic of China (PRC), however, it might reduce the powerful reputation of the PRC's Communist party in the international stage. In reality, the political ideology of Taiwan independence has kindled the intimidation of China through cross-strait crises such as military tests and war games (Chow, 2016). Overall, Taiwanese independence is a component that creates the biggest threat to the national security of not only Taiwan

but also East Asia (Clark, 2001). Thus, the national defense and national security measures are designed professionally to prevent China's threats considerably threatening the political ideology of Taiwan independence.

Taiwan independence is a political ideology which exists contrary to another political ideology, Taiwan-China unification, that raises an ideological warfare in Taiwan. Therefore, ideological security is promoted as a special aspect of national security in Taiwan to handle the ideological warfare and secure the existence and development of the political ideology of Taiwan independence. The national security affairs have emphasized specifically detecting how anti-Taiwan independence subjects undermine the political ideology of Taiwan independence and carrying out measures to maintain national security in terms of the political ideology of Taiwanese Independence.

Conclusion

The political ideology of Taiwan independence is an official political tendency in Taiwan, implying the independent status of Taiwan's territory, Taiwan's political regime and governance in relation to China as well as a belief in the status of intact independence for Taiwan internationally. The study proposes that it can be treated as a variable (belief) in Taiwan's human ecosystems.

According to the operation of human ecosystems, land (Taiwan's territory), population (citizens of Taiwan) and political subsystems (the KMT administration and the DPP administration) are three main variables that integrate the political ideology of Taiwan independence. The legal ownership of Taiwan's territory has become the fundamental basis of the political ideology of Taiwanese independence both legitimately and spiritually. In addition, the rise of the proportion of Taiwan citizens who identify themselves as Taiwanese (ethnicity and culture), who get a secure life with their middle-class background (business communities, technicians and Taiwanese elites), sped up the forming of the political ideology of Taiwan Independence. Besides, the changes in ruling administrations (the DDP administration and the KMT administration) with the changes in perceptions of the Republic of China (R.O.C)'s governance in Taiwan's territory had a strong influence on the development process of the political ideology of Taiwan independence.

Additionally, based on the components and variables of the Human Ecosystem Model, there is a tight relationship between beliefs and identity. Because Taiwan's history embraces stories of settler colonialism. Therefore, Taiwanese citizens who reflect themselves with pieces of Chinese culture and China's "homeland" through their ancestors impact their degrees of belief in the independence status of Taiwan. Also, the variables of age and gender considerably affect the proportion of Taiwanese citizens believing in Taiwan independence.

As function principles of human ecosystems, social institutions of Taiwan such as government, education, and security and defence are forced to interact according to the rise of the political ideology of Taiwan Independence. Political activities such as party construction, elections and other political competitions are designed based on the choice of the political ideology. Cultural and communicational governance aims to decrease "China's threats" to the political ideology of Taiwan independence through cultural activities and communication.

Measuring the political ideology of Taiwan independence based on the theoretical instruction of the HEM proves that numerous quantity of Taiwanese citizens support and share the same political belief about Taiwan independence that supposedly affects other variables in Taiwan' human ecosystem such as art, organisations, governance, education, commerce, justice and security.

The study findings additionally suggest that indigenous peoples' territories, cultural resources, and ideological security are key variables to solidify the political ideology of Taiwan independence. In terms of policy implementations, the indigenous affairs governance should focus on differentiating territorial and cultural background between Taiwan and China which significantly solidifies the political ideology of Taiwan independence. Besides that, the concept of ideological security should be advanced in Taiwan's national affairs to build up a security network for "Taiwan independence", coping with the escalating ideological warfare of Taiwan independence and China-Taiwan unification.

Finally, the study verifies that the Human ecosystem Model can provide empirical insights to interpret the political ideology of Taiwan Independence based on the theoretical understanding of the variable of beliefs. That shed more light on the political ideology of Taiwan independence as connecting it with not only social systems such as governance, education and social order but also biophysical resources such as land. Academically, the study findings contribute to an understanding that political ideologies could be assessed beyond the ordinary political realms expanding to a biophysical perspective. Also, this study demonstrates the HEM can additionally apply to study broader spaces (e.g. the nation of Taiwan) instead of small-sized locations such as communities, cities and natural areas (Dalton, 2010; Wang et al., 2011).

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Wykorzystanie bloga internetowego jako nowoczesnego narzędzia służącego do kreowania wizerunku wybranych polskich firm w branży modowej

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Słowa kluczowe internet, media społecznościowe, firma, działalność gospodarcza, wizerunek, blogi modowe

Abstrakt

Celem tego artykułu było ukazanie potencjału, jaki tkwi w blogach modowych. W związku z tym poddano analizie wykorzystanie blogów modowych jako narzędzia do budowania strategii wizerunkowej wybranych firm z branży mody w latach 2012–2023. Starano się uzyskać odpowiedzi na następujące pytania badawcze: 1) jakie były okoliczności powstania blogów modowych w Polsce w latach 2012–2023 i czy były one dość często wykorzystywane przez polskie firmy odzieżowe jako narzędzie komunikacji; 2) czym się charakteryzowały prezentowane treści i w jaki sposób były prowadzone blogi polskich właścicieli firm modowych; 3) w jakim stopniu działalność blogerek modowych wpływała na rozpoznawalność marek własnych i współzałożycielskich; 4) jaką skalę oddziaływania blogów modowych na zachowania konsumenckie odnotowano w latach 2010–2023? Wykorzystano następujące metody badawcze: analizę ilościową, historyczną, behawioralną, decyzyjną i komparatystyczną. Po przeprowadzeniu badań stwierdzono, że blogi modowe miały istotny wpływ na promowanie wizerunku marek modowych blogerek. Blog był postrzegany jako skuteczny kanał informacyjny o dużym potencjale kreowania treści wizerunkowych firm z branży mody.

The use of the internet blog as a modern tool to create the image of selected Polish companies in the fashion industry

Keywords

Internet, social media, company, business, image, fashion blogs

Abstract

The aim of this article was to show the potential of the fashion blog and to analyse the use of the fashion blog as a tool for building image strategy of selected companies from the fashion industry in the years 2012–2023. This analysis was based on research studies, fashion blogs, and press articles concerning, among others, the activity of Polish fashion bloggers in the years 2009–2023, and ways of promoting companies operating in the clothing industry online. Answers were sought to the following research questions: 1) what were the circumstances of the emergence of fashion blogs in Poland between 2012 and 2023 and were they used quite often by Polish fashion companies as a communication tool? 2) what

were the characteristics of the presented content on blogs and how were the blogs of Polish female owners of fashion companies managed? 3) to what extent did the activity of female fashion bloggers influence the recognition of own and co-founder brands? 4) what was the extent of influence of fashion blogs on consumer behaviour between 2010 and 2023? The following research methods were used in the study: quantitative, historical, behavioural, decision-making and comparative analysis. The analysis made it possible to conclude that fashion blogs had a significant impact on promoting the image of fashion bloggers brands. The blog was perceived as an effective information channel with a high potential for creating image content for companies in the fashion industry.

Wprowadzenie

Internet i media społecznościowe są stałym elementem życia współczesnych społeczeństw. W ostatniej dekadzie obserwowano ich dynamiczny rozwój i udział w promowaniu firm. Szczególną dynamiką charakteryzował się sektor modowy, co zresztą zrozumiałe, wszak marketing zakodowany jest w DNA tej branży. Często określany jest on mianem istoty i ducha mody. Branża modowa bardzo szybko dostrzegła znaczenie mediów społecznościowych i do perfekcji opanała kreowanie wizerunku za ich pośrednictwem. Marki modowe wykorzystują internet do umacniania więzi na linii klient–marka i są znakomitym przykładem kreowania wizerunku, wewnętrznego i zewnętrznego, za pomocą nowoczesnej technologii (Posner, 2019, s. 4–5). Zatem biznes modowy rozpatrywany jest jako zjawisko związane z kulturą, które stało się globalnym przemysłem o ogromnym zasięgu. Współcześnie marketing i branding odgrywają kluczową rolę w każdym segmencie przemysłu mody – są pomostem łączącym modę, będącą zjawiskiem kulturowym, z biznesem (Posner, 2019, s. 4). Istotę branży modowej i jej powiązania z marketingiem doskonale obrazują słowa Philipa Kotlera: „Marketing nie jest sztuką wynajdywania sprytnych sposobów zbywania tego, co się wyprodukowało. Marketing jest sztuką tworzenia prawdziwej wartości dla klienta” (Posner, 2019, s. 9).

W drugiej dekadzie XXI wieku nastąpił widoczny rozwój platform blogowych wpływających na rozpoznawalność marek modowych u konsumentów. Blogosfera jest stosunkowo młodą przestrzenią w internecie, jednak z roku na rok coraz odważniej zaznacza swoją obecność i nabiera znaczenia, którego nie wolno lekceważyć. Z badań przeprowadzonych dotychczas wynika, że jest to rozległa, zróżnicowana przestrzeń i już próba kategoryzacji blogów wiąże się z wieloma problemami. Tematyka blogów i wpływ, jaki wywierają na kształtowanie wizerunku przedsiębiorstw, to złożone i wielowątkowe zagadnienie. Celem tego artykułu było przedstawienie mechanizmów, które sprawiają, że blog internetowy staje się narzędziem służącym do budowania strategii wizerunkowej branży modowej. Wybrano i przeanalizowano działalność firm blogerek modowych, prowadzonych w latach 2012–2023 (BFS JAGODZIŃSKA Paulina Nowicka, DREAMLAND by Paula Jagodzińska, MOIESS SWIMWEAR, Veclaim, Staff by Maff, Eppram). Porównano blogi prowadzone przez polskie właścicielki firm oraz to, w jaki sposób treść blogów wpłynęła na wzrost sprzedaży promowanych produktów, a także w jakim zakresie

blogi modowe oddziaływały na zachowania konsumentów. W związku z tym sformułowano tezę: Blog jest skutecznym narzędziem wykorzystywanym w procesie budowania wizerunku marki na przykładzie branży odzieżowej. W kontekście omawianej problematyki postawiono następujące pytania badawcze:

1. Jakie były okoliczności powstania blogów modowych w Polsce w latach 2009–2023 i czy były one dość często wykorzystywane przez polskie firmy odzieżowe jako narzędzie komunikacji z konsumentem?
2. Czym się charakteryzowały treści prezentowane na blogach i w jaki sposób były prowadzone blogi polskich właścielek firm modowych?
3. W jakim zakresie działalność blogerek modowych miała wpływ na rozpoznawalność ich marek?
4. Jaki był zakres oddziaływania blogów modowych na zachowania konsumentek w latach 2010–2023?

Interdyscyplinarne podejście do analizowanego zagadnienia (na pograniczu medioznawstwa i marketingu) wymagało zastosowania następujących metod badawczych: analizy ilościowej, historycznej, behawioralnej, decyzyjnej oraz komparatystycznej.

Blog jako forma komunikacji firmy z konsumentem – okoliczności powstania i typy blogów

Uznaje się, że początki blogów sięgają lat 70. XX wieku. Twórcą pierwszego protoblogowego narzędzia – *finger protocol* – był Les Earnst (Michałowska, 2016, s. 132). Nowoczesną formę blogowania datuje się na drugą połowę lat 90. XX wieku, z kolei rok 2004 uznaje się za przełomową datę, jeżeli chodzi o zastosowanie tej formy komunikacji w środowisku biznesu. Nazwa WebLog została wymyślona przez Jorna Bergera, który był jednym z trzech pionierów (Dave Winer, Justyn Hall) blogowania. Natomiast skrót blog, jako pierwszy, użył Peter Merholz (Michałowska, 2016, s. 132).

Termin blog pochodzi z języka angielskiego (*weblog* – pamiętnik internetowy, dziennik sieciowy). Blog jest rodzajem strony internetowej, gdzie wpisy umieszczane przez autora mają odwrócona chronologię (na początku zawsze jest najnowszy wpis). Pozwala to na zachowanie porządku i przejrzystej dla czytelnika formy. Każdy wpis składa się z daty, tytułu oraz tekstu. Czytelnicy mają natomiast możliwość zamieszczenia komentarza, w wyznaczonym miejscu, zazwyczaj pod postem. W przypadku blogów o tematyce modowej tekst często jest wzbogacony grafikami, materiałami wideo bądź zdjęciami.

Blogi zaliczane są do mediów służących komunikacji, a środowisko blogerów nazywane jest często „blogosferą” (Gumkowska, Maryl, Toczyski, 2009, s. 5–12). W literaturze przedmiotu znajduje się wiele ujęć terminu „blog” – jest on definiowany w zależności od struktury, charakteru i tematyki. Elementem wspólnym różnych definicji jest natomiast przekonanie, że jest to strona internetowa, na którą składają się wpisy tekstowe, wzbogacone niekiedy dodatkowymi materiałami, prezentujące poglądy autora.

Badania nad mediami społecznościowymi stały się interesującą aktywnością dla badaczy. Blog, jako rodzaj strony internetowej, dał początek dobrze znanym obecnie serwisom (np. Instagram, Facebook). Część badaczy jest zgodna co do tego, że niemożliwe jest zaszerzeganie blogów do konkretnej grupy tematycznej, różnią się bowiem pod względem specyfiki prowadzenia, branży, której dotyczą oraz sposobu komunikowania. Upraszczając nieco, blog można określić jako stronę internetową, która skupia grupę osób zainteresowanych podobną tematyką, np. modą, sportem, muzyką.

Blogi modowe szybko stały się niezbędnym kanałem komunikacji marek branży odzieżowej. Blog jako komunikator miał, i ma, za zadanie wpływać na zachowania rynkowe konsumentów. W zależności od preferencji autora, teksty zamieszczane na blogu mogły koncentrować się na wyborach modowych znanych ludzi na świecie – niektórzy rekomendowali miejsca, gdzie można znaleźć hity sezonu z zakresu damskiej i męskiej mody, inni twórcy skupiali się na przemyśleniach dotyczących wybranych firm i oferowanych przez nich kolekcji ubrań. Blogowanie w branży modowej stało się akceptowaną i pożądaną formą zdobywania wiedzy przez osoby poszukujące modowych inspiracji. Zapotrzebowanie na tego rodzaju aktywność w sieci dało możliwość wyrażania poglądów i myśli zarówno przez pojedynczych blogerów, jak i przez przedsiębiorstwa (Sempruch-Krzemińska, 2018, s. 184).

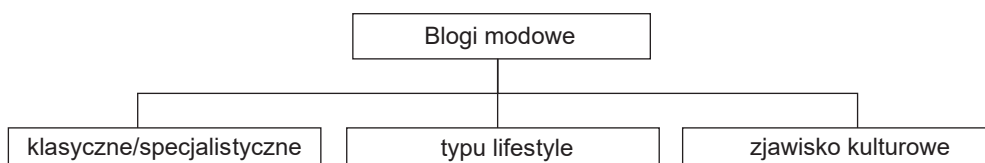
Blogi modowe, mimo kilkunastoletniej obecności w internecie, w dalszym ciągu są uznawane przez badaczy za nowy komunikator. Zadaniem pamiętnika internetowego w branży mody było, i jest, zebranie społeczności skupionej wokół konkretnej tematyki i stworzenie interakcji na linii marka–konsumet. Miało być to jednocześnie wiarygodne źródło dostarczające informacji zwrotnych na temat produktu bądź firmy i jej działań marketingowych. Wszystko to wpływało na świadomość odbiorców, czyli potencjalnych konsumentów, którzy zdawali sobie sprawę, że mogą mieć realny wpływ na świat mody, inicjując np. dyskusję w komentarzu pod wpisem (Sempruch-Krzemińska, 2018, s. 183).

Za najpopularniejszą blogerkę na świecie uznaje się włoską bizneswoman Chiare Ferragni, która zmieniła postrzeganie blogów modowych. W 2009 roku założyła swojego bloga o nazwie *The Blonde Salad*. Ferragni zbudowała prawdziwe imperium modowe, zmieniając prostego bloga w magazyn online o tematyce modowej, następnie w platformę e-commerce. Wyczucie biznesowe i kreatywność włoskiej blogerki zaowocowały nawiązaniem współpracy z takimi domami mody, jak: Chanel, Fendi czy Dior oraz pojawieniem się zdjęć blogerki na okładkach najbardziej prestiżowych czasopism modowych, np. *Vogue*. Obecnie Ferragni jest prezeską w dwóch założonych przez siebie firmach – Chiara Ferragni Collection i The Blonde Salad (Gajoch, 2022). Dodatkowo aktywnie prowadzi profil na Instagramie, gdzie zgromadziła 29,7 milionową społeczność (@chiaraFerragni, instagram.com).

Warto zauważyć, że zadaniem blogów jest konsolidowanie społeczności internetowej skupionej wokół konkretnej dziedziny, branży bądź marki. Moda zawsze była uznawana za dynamiczne zjawisko. Marketing mody bazował na wspólnych zasadach, odpowiednio adaptując je pod kątem aktualnych trendów, aby sprostać oczekiwaniom konsumentów. Biorąc pod uwagę tematykę blogów, należy zaznaczyć, że branża mody i nowinki na temat działalności firm odzieżowych cieszą się dużą popularnością wśród internautów, zwłaszcza kobiet.

W literaturze przedmiotu trudno jest odnaleźć jednoznaczną typologię blogosfery modowej – problemy z klasyfikacją są spowodowane rozbudowaną formą branży mody. Blogi zazwyczaj dzieli się na odrębne kategorie, mając na uwadze kryteria formy i treści. Podziału blogów, ze względu na ich formę, dokonała Anetta Barska, autorka pracy – *Reklama wczoraj i dziś*. Wyróżniła ona blogi tradycyjne (weblog), wideo (vlog), mobilne fotoblogi i mikroblogi. Blogi dotyczące branży modowej miały zróżnicowaną treść i formę (Barska, 2016, s. 132), co wynikało głównie z umiejętności i możliwości ich autorów. Dzięki temu bloger był w stanie nadać stronie unikalny wygląd, tak, by treści były spójne z szatą graficzną.

W przypadku blogów modowych, biorąc pod uwagę treść, można wyróżnić trzy bloki tematyczne (rys. 1).



Rysunek 1. Klasyfikacja blogów modowych

Źródło: opracowanie własne na podstawie: Szulc (2019), s. 155–157; WIXBlog (2022); Maryl, Niewiadomski, Kidawa (2016), s 63–65.

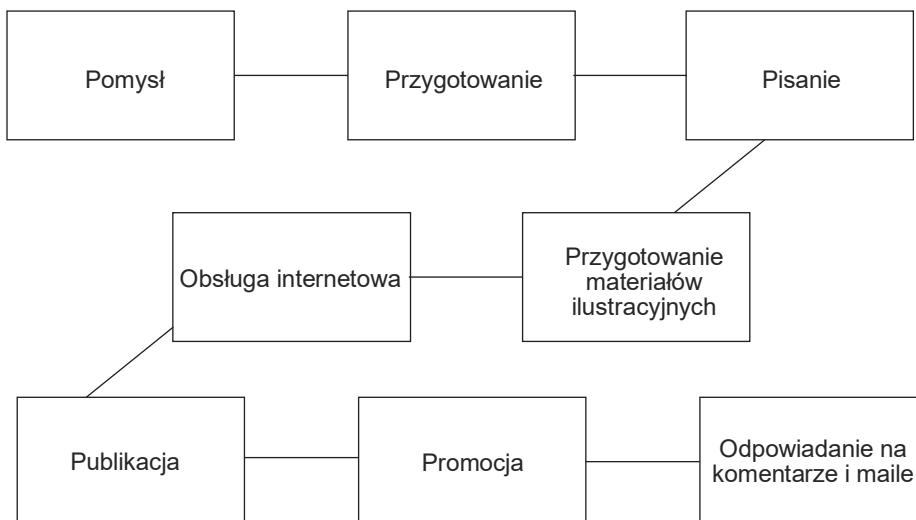
W zaprezentowanej klasyfikacji blogi modowe podzielono na: klasyczne (specjalistyczne), typu lifestyle oraz zjawiska kulturowe. Blog klasyczny zazwyczaj składa się z bazy, czyli tekstu uzupełnionego o treści graficzne, najczęściej fotografie, choć może także zawierać materiały wideo. Tematyka dotyczy głównie aktualnych trendów oraz ich interpretacji (przygotowanych przez autora pamiętnika internetowego). Często praktyką było dzielenie się swoimi pomysłami, np.: jak zaaranżować stylizację, aby wpasować się w aktualne kanony mody. Zajmowano się także oceną stylizacji znanych osób oraz przeglądem nowych kolekcji ubrań marek modowych. Blogerzy często decydowali się na podział bloga na kategorie tematyczne, dzięki temu czytelnik bloga był w stanie łatwo zlokalizować interesujące go treści.

Drugi typ bloga modowego charakteryzuje się nieco swobodniejszą formą, wprawdzie co najmniej połowa wpisów dotyczy tematów związanych z modą, autor bloga zamieszcza dodatkowo wpisy dotyczące życia codziennego i relacje z podróży. Często praktyką było przejście z bloga tradycyjnego na typ lifestyle, co pozwalało rozszerzyć tematykę, a w pewnym stopniu zbliżało go do innych tego typu serwisów i dawało możliwość dotarcia do większego grona odbiorców. W trzeciej kategorii bloga moda traktowana jest jak zjawisko – autor stara się pokazać aktualny charakter mody oraz jej wpływ na kulturę. Treść pamiętnika internetowego w większym stopniu odnosiła się do kontekstu społeczno-psychologiczno-historycznego niż wizualnego aspektu stylizacji. Wpisy miały charakter głębszych rozważań nad tematem, który opatrzone był szczegółowym przeglądem dostępnych danych.

Projektowanie bloga przez właścicielki firm modowych w Polsce

Rozwój mediów społecznościowych oznaczał swego rodzaju powrót do kultury obrazkowej. Media takie jak: Instagram, Pinterest i Facebook tworzyły przekazy składające się głównie z obrazów. Za wzrost popularności tego rodzaju mediów odpowiadał szum informacyjny. We współczesnym społeczeństwie istnieje duże zapotrzebowanie na szybką gratyfikację oraz skrócenie czasu, który należy poświęcić na pełną koncentrację. Jest to cenna uwaga z punktu widzenia branży odzieżowej. To właśnie tam obraz jest głównym nośnikiem, to on „odpowiada” za szeroko pojętą sprzedaż (Sempruch-Krzemińska, 2018, s. 171).

Badacze podkreślają, że blogowanie postrzegane jest jako forma dwustronnej komunikacji. Proces ten wymaga od autorów bloga łączenia kilku aktywności związanych z prowadzeniem własnej strony. Anna Buchner i Maciej Maryl, autorzy pracy *Warsztat twórczy blogerów w kontekście współczesnych przemian kultury literackiej*, zaproponowali wyodrębnienie poszczególnych etapów wpisu na blogu (rys. 2).



Rysunek 2. Etapy i zadania związane z powstaniem wpisu na blogu

Źródło: opracowanie własne na podstawie: Buchner, Maryl (2016), s. 45–47.

Każdy blog, i posty będące jego częścią, zaczynał się od poszukiwania pomysłu na ujęcie określonego tematu. Wpis był efektem niespodziewanego przypływu weny. Inspiracją do tego typu działań mogą być sytuacje z życia codziennego lub chęć wyrażenia opinii o konkretnym produkcie lub wydarzeniu. Najważniejszym elementem procesu powstawania wpisu blogowego jest tworzenie tekstu – pozostałe elementy są mu podporządkowane. W zależności od umiejętności pisarskich oraz dyspozycji, etap ten mógł blogerowi zajmować od kilku minut do kilkunastu godzin. Następnie przygotowywany był materiał dodatkowy, np. fotografie. Należy zauważyć,

że w przypadku blogów modowych pozyskanie odpowiedniej zdjęć należało do istotnych zadań właściciela internetowego pamiętnika. Autor bloga bądź osoba przez niego zatrudniona, mając przygotowany materiał do opublikowania, zazwyczaj korzystała z platformy Wordpress (Buchner, Maryl, 2016, s. 45–47).

Poprzez przygotowanie wpisu rozumie się dodanie tagów z hasłami, zamieszczenie słów kluczowych, ważnych w kontekście wyszukiwania oraz dodanie hiperlinków. Tak przygotowany wpis, po sprawdzeniu, zamieszczany był na blogu. Powiązane jest to z promocją usług bądź produktów reklamowanych na blogu. Większość blogerów posiadała konta na portalach społecznościowych (Facebook, Instagram), gdzie zachęcała internautów do czytania swoich blogów. Właściciele pamiętników internetowych często podejmowali dodatkowe kroki mające na celu zwiększenie zasięgu bloga, np. promocja w ramach newslettera, udzielanie wywiadów lub prowadzenie swoich rubryk w magazynach modowych. Etapem końcowym była odpowiedź na pojawiające się komentarze (Buchner, Maryl, 2016, s. 45–47).

Blogi modowe okazały się być świetnym narzędziem marketingowym marek oraz źródłem dochodów dla blogerów. Stały się formą kreowania mody, mającą wpływ na oblicze całej branży. Dzięki temu, niezależnie od położenia geograficznego, internauci mogli śledzić co działo się w uznanych stolicach mody: Paryżu, Mediolanie czy Nowym Jorku (Kall, Sempruch-Krzemińska, 2017, s. 23–24). Najbardziej wpływowe blogi stały się marką własną, konkurując z opinio-twórczymi magazynami modowymi, tak było m.in. w przypadku bloga Chiary Ferragni. Dzięki blogom marki modowe są w stanie pozyskać potencjalnych konsumentów, dlatego większość firm jest świadoma, że obecnie jest to jedna z najlepszych form przeprowadzania kampanii wizerunkowych przedsiębiorstwa (Kall, Perchla-Włosik, Raciniewska, Sempruch-Krzemińska, 2018, s. 185).

Polskie blogerki modowe są znane i doceniane nie tylko w kraju. Od 2013 roku Jessica Mercedes i Julia Kuczyńska stopniowo zwiększały swoją rozpoznawalność medialną, wykorzystując blog, co zaowocowało współpracą z zagranicznymi markami oraz zapraszaniem blogerek na międzynarodowe wydarzenia związane z modą. Warto podkreślić, że, poczucie stylu i umiejętność promocji były niezbędne, aby polskie blogerki zostały zauważone przez zagraniczne firmy.

Jessica Mercedes Kirschner nadała swojej stronie wyrazisty charakter, systematycznie publikując niebanalne stylizacje. Umiejętnie połączyła pasję z dochodowym biznesem. Oprócz codziennych stylizacji blogerka zamieszczała relacje z pokazów mody. Nawiązała współpracę z takimi markami jak: Dior, Pandora, Chanel, dzięki czemu stała się sławna nie tylko wśród polskich internautów. Znanie magazyny modowe, np. *Vogue*, *Vanity Fair* czy *Elle* nieraz pisały o polskiej fashionistce. Jemerced jest znana ze swojego odważnego i niebanalnego stylu. W materiałach zamieszczanych na blogu często pokazywała, jak bawić się aktualnymi trendami, inspirując przy tym swoich obserwatorów. Jej autentyczność, wycucie stylu i charyzma przyczyniły się do stworzenia prawdziwego imperium modowego. W 2020 roku jej blog miesięcznie odwiedzało ponad milion użytkowników pochodzących z różnych zakątków świata (Zelezny, 2020).

Julia Kuczyńska, znana jako Maffashion, już na początku swojej kariery wyróżniała się wśród blogowych twórców. Nie bała się tworzyć zestawień modowych, kierując się intuicją, dzięki czemu jej stylizacje były zindywidualizowane i oryginalne. Blogerka zyskała sympatię

czytelników dzięki prezentowaniu niestandardowych pomysłów. Odważna blogerka w wielu wpisach na blogu udowodniła, że modą można się bawić. Wykazała się zmysłem do łączenia kolorów i fasonów z elementami, które były uznawane za trendy. To właśnie za niezwykle wy-czucie i odwagę bycia inną, jej blog odwiedzali kolejni internauci (Wittenberg, 2013). Blogerka miała na swoim koncie współpracę ze znanymi na świecie magazynami, takimi jak: *Vogue*, *Glamour*, *Nylon*. W 2012 roku pojawiła się na okładce znanego magazynu *K MAG*. W 2013 roku, jako jedyna Polka z czterech blogerek z całego świata, wzięła udział w prestiżowej kampanii reklamowej marki Bershka. Natomiast w 2014 roku ogłoszono ją Człowiekiem Roku Internetu 2013 i przyznano jej statuetkę Glam Award w kategorii najlepsza blogerka. W 2019 roku na prestiżowej gali See Bloggers J. Kulczyńska otrzymała tytuł „Influencerki dekady”. Czytelnicy pokochali ją za autentyczność, zabawę modą i umiejętne tworzenie niebanalnych stylizacji. Wybierając ubrania z sieciówek pokazała, że jest fachowcem i można jej ufać w kwestiach mody (Magiera, 2023, s. 84–85).

Paulina Jagodzińska przyzwyczaiła obserwatorów do bardziej różnorodnej tematyki określanej jako lifestyle. W 2011 roku blogerka zaczynała od prezentowania treści związanych z modą, makijażem i pielęgnacją. Czytelnicy doceniali ją za rozszerzenie tematyki bloga – Jagodzińska zaczęła publikować treści motywacyjne i związane z tematyką podróżniczą. Udało się jej połączyć pasję do mody i podróży, a zmiana ta doprowadziła do większego „ruchu” na blogu. Blog internetowy, mimo różnorodnej tematyki, miał przejrzystą formę, a nowi czytelnicy mogli bez trudu dotrzeć do interesujących ich zagadnień, sklasyfikowanych ze względu na poruszaną tematykę. Blogerka we wpisach dzieliła się z czytelnikami swoim doświadczeniem i udzielała rad. Jagodzińska współpracowała m.in. z marką modową NAOKO, prezentowała pomysły na stylizacje wybranych przez siebie produktów. Blogerka chętnie dyskutowała z czytelnikami na temat promowanych produktów – działania te miały zachęcić internautów do wyrażenia opinii o marce NAOKO oraz zwiększyć rozpoznawalność ubrań u potencjalnych konsumentów (blog paulajagodzinska.pl).

Blogi modowe w budowaniu i kreowaniu wizerunku marek polskich blogerek

Proces zakupowy zazwyczaj zaczyna się od poszukiwania inspiracji – osoby zainteresowane modą najczęściej preferowały następujące źródła informacji: magazyny modowe, moda uliczna (osoby wyróżniające się określonym stylem), media społecznościowe, blogi modowe (Perchla-Włosik, 2018, s. 60). W XXI wieku konsument poszukiwał i poszukuje produktów wyjątkowych. Z kolei marki modowe poprzez innowacyjny, a często niestandardowy sposób działania budowały swój kapitał (Kall, 2018, s. 87–88). Warto dodać, że w ostatnich latach do rozpoznawalności i rozwoju firm znacząco przyczyniły się media społecznościowe.

W porównaniu z takimi serwisami jak Instagram czy Facebook, blogi dawały większą swobodę twórczą. Blogosferę charakteryzowała dużo większa dowolność, nie tylko ze względu na rodzaj publikowanych treści, ale i wygląd strony. Natomiast media społecznościowe narzuciły użytkownikom określony regulamin, szatę graficzną oraz sposób publikowania

treści. W przypadku blogosfery to jego autor może dowolnie konfigurować ustawienia, ze względu na swoje wyczucie stylu i chęć wyróżnienia się. Blog modowy często utożsamiany był ze stylem blogera – twórca strony internetowej zajmujący się modą dużo uwagi poświęcał fotografiom, które stanowiły główny element wpisu. Dbłość o detale i wysoką jakość zdjęć była priorytetem właściciela pamiętnika internetowego. Przedstawione w artykule blogerki wybrały jasną i przejrzystą szatę graficzną dla swoich blogów. Wyraźnie wydzielone rubryki tematyczne umożliwiały nowym czytelnikom szybkie znalezienie interesujących treści. Pozwoliło to blogerkom na wyróżnienie się i zyskanie aprobaty nawet najbardziej wymagających użytkowników. Blogi modowe należały do specyficznej grupy platform – autor bloga mógł publikować wpisy z dowolną częstotliwością, grupując je według wybranej przez siebie kategorii. Zazwyczaj wpisy na blogach były planowane z wyprzedzeniem – były reakcją na wydarzenia branżowe, interpretacją aktualnych trendów. Prowadzenie bloga modowego to jednak nie tylko tworzenie treści, ale również rekomendowanie produktów, które blogerka wcześniej przetestowała.

W zależności od stopnia rozpoznawalności, blogerzy byli zapraszani na wydarzenia związane ze światem mody. Mogły to być pokazy mody, uroczyste otwarcia nowych sklepów czy promocje nowych kolekcji marki. Na potrzeby niniejszego artykułu dokonano porównania aktywności polskich blogerek w mediach społecznościowych – skoncentrowano się na analizie działalności blogerskiej w kontekście jej wpływu na zgromadzone społeczności w 2023 roku. W tabeli 1 przedstawiono skalę zainteresowania internautów działalnością Jessici Mercedes Kirschner, Julii Kuczyńskiej oraz Pauliny Jagodzińskiej po 2010 roku (na Instagramie i Facebooku).

Tabela 1. Liczba obserwujących polskie blogerki modowe na Instagramie i Facebooku oraz ich najintensywniejsza działalność blogerska po 2009 roku

Imię i nazwisko	Pseudonim	Wiek	Liczba obserwujących na Instagramie	Liczba obserwujących na Facebooku	Nazwa marki	Nazwa bloga	Rok założenia bloga	Lata największej aktywności na blogu
Jessica Mercedes Kirschner	Jemerced	30	908K	228K	MOIESS Swimwear, Veclaim	jemerced.com	2010	2012–2016
Julia Kuczyńska	Maffashion	36	1.4M	783K	Staff by Maff, Eppram	maffashion.pl	2009	2009–2015
Paulina Jagodzińska	Paula Jagodzińska	32	385K	200K	DREAM-LAND by Paula Jagodzińska, BSF Jagodzińska Paulina Nowicka	paulajagodzińska.pl	2011	201–2020

Źródło: opracowanie własne na podstawie: Instagram @jemerced (23.11.2023); Instagram @maffashion_official (23.11.2023); Instagram @paula_jagodzińska (23.11.2023); Blog PaulaJagodzińska.pl (23.11.2023).

Liczby obserwatorów (na Instagramie i Facebooku): K – tysiąc, M – milion

Trzy wskazane blogerki nie zostały wybrane przypadkowo. Dzięki zbudowaniu społeczności na swoich profilach w mediach społecznościowych osiągnęły duże zasięgi, dlatego też właśnie ich działalność medialna została poddana analizie. Wszystkie charakteryzowało zamiłowanie do mody, umiejętność autopromocji oraz prowadzenie własnych firm modowych. Swoją blogerską karierę rozpoczęły w latach 2009–2011. Na podstawie analizy behawioralnej stwierdzono, że w zależności od reakcji społeczności na podejmowane działania wizerunkowe blogerki eksperymentowały z tworzeniem strategii wizerunkowej.

Dzięki wieloletniej działalności w internecie blogerki były w stanie zbudować swoje marki osobiste (w tabeli wskazano ile lat mają blogerki – Jemerced i Paula Jagodzińska są zbliżone wiekowo). Jednak za prekursorów w polskiej blogosferze należy uznać Maffashion i Jemerced, które w latach 2010–2016 były uznawane przez dziennikarzy za największe rywalki. Na portalach plotkarskich pojawiały się artykuły o konflikcie blogerek, w mediach nieustannie porównywano fashionistki, bazowano na komentarzach wyjętych z kontekstu. Działania te przyczyniły się do potyczek słownych wśród fanów blogerek (JastrzābPost, 2021). Każda z nich znalazła jednak swoją niszę i zbudowała własną społeczność. Brały ponadto udział we wspólnych kampaniach reklamowych, np. kampania Zalando realizowana pod hasłem „Wyraź swoje piękno” (Wojtczak, 2019). Obecnie tylko Paulina Jagodzińska aktywnie prowadzi swojego bloga, dwie pozostałe influencerki zawiesiły swoje blogi i skupiły się na działalności w mediach społecznościowych. Decyzja ta była spowodowana chwilowym spadkiem popularności blogów.

Media społecznościowe stały się najpopularniejszą formą internetowej aktywności wśród polskich blogerek modowych. W latach 2019–2023 największym zainteresowaniem wśród obserwatorów blogerek modowych cieszył się Instagram, który stał się dobrym narzędziem do tworzenia treści reklamowych i kreowania wizerunku. Influencerki takie jak: Jemerced, Maffashion i Paula Jagodzińska „przeszły” z bloga na Instagram i zbudowały tam swoje wpływowość i opiniotwórcze konta, systematycznie zwiększając liczbę obserwujących je użytkowników.

Można powiedzieć, że Instagram jest rodzajem platformy wzorowanej na blogach – tu jednak na plan pierwszy wysuwają się zdjęcia opatrzone jedynie krótkim opisem.

Tak jak w przypadku bloga możliwe jest zamieszczanie komentarzy. Istotą blogów i Instagrama jest budowanie przemyślanych treści bazujących na fotografiach i tekście. Jednak platforma, w przeciwieństwie do blogów, pozwalała na kreowanie tymczasowych treści, przykładem mogą być publikowane jednodniowe relacje – „story”, które zniknęły z profilu po upływie 24 godzin. Serwis społecznościowy (Instagram) zyskał uznanie dzięki elementowi „spontaniczności” – użytkownicy czuli się swobodniej, publikując tam treści, a blogerzy wykorzystali platformę do pokazywania swojej „ludzkiej” strony. Czytelnicy blogów byli ciekawi, jak wygląda prawdziwe życie ich idolek, czy proces tworzenia kampanii reklamowych.

Autorką bloga, który jako pierwszy poddany został analizie jest Jessica Mercedes Kirschner. Nazwa bloga – jemerced.com, to jednocześnie pseudonim blogerki. W 2014 roku jej pamiętnik internetowy został przekształcony w mały portal modowy z profesjonalnie wykonanymi fotografiami (Wojtczak, 2018). Blogerka, aby rozwijać platformę blogową, nie tracąc przy tym na jakości publikowanych treści, zatrudniła grupę pracowników, którzy byli odpowiedzialni za

poszczególne sekcje tematyczne. Dzięki temu zmieniona została szata graficzna, a działy mody rozbudowane. Jednocześnie na blogu publikowano posty tworzone osobiście przez blogerkę. Blog Jemerced był przejrzysty, a na jego stronie głównej zamieszczano pomysły na stylizacje i komentarze dotyczące bieżących wydarzeń ze świata mody. Po lewej stronie bloga znajdowała się rubryka „My style”, gdzie osobiście umieszczała treści. Natomiast po prawej stronie bloga w rubryce „Daily” zamieszczano materiały dotyczące świata mody autorstwa zespołu redakcyjnego. Strona bloga modowego była spójna pod względem treści oraz posiadała interesującą szatę graficzną. W górnej części bloga widniały zakładki „Runway”, „Fashion”, „Celebrity”, „Beauty”, „Video” oraz „Contact”. Dodatkowo w pamiętniku internetowym umieszczono odnośniki do oficjalnych profili w mediach społecznościowych fashionistki (blog jemerced.com).

Podobną strategię działań przyjęła Julia Kuczyńska, która mogła pochwalić się największą społecznością, sięgającą w 2023 roku – 1,4 mln użytkowników na Instagramie. Działalność blogerska Maffasahion była prowadzona w latach 2009–2015. Kuczyńska stała się tym czasie najbardziej znaną polską blogerką modową. Jej blog charakteryzował się minimalistyczną i spójną szatą graficzną. Na stronie internetowej „Maffashion” wyodrębniono kategorie: „Strona główna”, „Archiwum”, „Kontakt” i „Lookbook” oraz odnośniki do jej oficjalnych kont w mediach społecznościowych. Wpisy dotyczyły interpretacji mody w wydaniu Kuczyńskiej. Na estetycznych fotografiach prezentowano stylizacje modowe, które charakteryzowały się wysoką jakością i dbałością o detale. Na dole bloga znajdowała się sekcja przeznaczona do pozostawiania komentarzy (blog maffashion.pl).

Trzeci z analizowanych blogów należał do Pauliny Jagodzińskiej. Blogerka założyła go w 2011 roku. Od samego początku istnienia prowadziła go z mężem, który dbał o stronę techniczną. Tak jak koleżanki z branży, Jagodzińska postawiła na przejrzystą szatę graficzną – na górze strony znajdowało się logo „PaulaJagodzińska” (początkowo Beauty.Fashion.Shopping). Poniżej, na pasku, zamieszczono kategorie tematyczne: „Strona główna”, „O mnie”, „Współpraca”, „Kontakt”, „Polityka prywatności. Główna część przeznaczona została na wpisy blogerki oraz linki do jej sklepu internetowego z odnośnikami do profili Jagodzińskiej w mediach społecznościowych. W odróżnieniu od blogów Jemerced i Maffashion, po prawej stronie, w kolumnie, wyodrębniono kategorie tematyczne oraz archiwum pamiętnika internetowego Jagodzińskiej. Takie rozmieszczenie dobrze współgrało z wpisami znajdującymi się po lewej stronie (blog, paulajagodzinska.pl).

Analiza komparatystyczna trzech wybranych blogów oraz związanej z nimi działalności blogerek modowych wykazała, że korzystanie z nowych mediów w życiu codziennym miało wpływ na procesy komunikacyjne firm. Nowe media stały się globalnymi komunikatorami wpływającymi na zarządzanie wizerunkiem marki modowej.

Blog jako narzędzie do zarządzania wizerunkiem firm modowych w sieci

W XXI wieku wykorzystanie internetu jako głównego źródła informacji o firmie stało się kluczowym elementem promocji produktów i usług. Media społecznościowe stały się optymalnym kanałem dystrybucji komunikatów marketingowych. Dodatkowo były one, i są nadal, trafnym

źródłem postrzegania marki przez użytkowników sieci. Poprzez pozyskiwanie opinii internautów możliwe było planowanie skutecznych działań wizerunkowych.

Współczesna komunikacja sieciowa jest wyznacznikiem efektywnego zarządzania wizerunkiem firmy. Szczególne znaczenie ma to w przypadku branży modowej, której znakiem rozpoznawczym jest ogromna konkurencyjność. Odpowiedni model komunikacji pozwalał zatem na trwałą obecność marki na rynku, poprzez zaistnienie w umysłach konsumentów. Proces ten skupiał się wokół wymiany emocji, doznań i komentarzy związanych z odbiorem marki odzieżowej. Nowoczesne technologie znacząco wpłynęły na obszar funkcjonowania i model komunikacji w branży mody. Marki odzieżowe stały się również bardziej dostępne dla szerokiej grupy klientów (Sempruch-Krzemińska, 2018, s. 170). Rozwój współpracy marek modowych można było sklasyfikować jako naturalne zjawisko.

W ramach współpracy bloger tworzył kampanię wizerunkową marki bądź wybranego produktu. W związku z promowanym produktem lub usługami, czytelnik miał poczucie bycia częścią społeczności skupionej wokół firmy. Za pośrednictwem bloga odbiorca miał szansę zajrzeć za kulisy przemysłu modowego. Dawało mu to, jako konsumentowi, poczucie wyjątkowości, czuł się dowartościowany, co przełożyło się na budowanie pozytywnych wspomnień z marką.

Duża konkurencyjność w branży modowej wymagała od firm zdecydowanych działań wizerunkowych. Kluczową kwestią był więc proces kreowania marki i jej tożsamości. Na potrzeby tego artykułu skupiono się na firmach założonych i wykreowanych przez blogerki modowe w latach 2012–2023. W początkowym okresie działalności blogerki odpowiadały za projektowanie silnej marki osobistej. Właścicielki wykorzystały swoje doświadczenie w kreowaniu wizerunku marki, aby ugruntować w świadomości odbiorców istnienie swoich firm. Działania te były przemyślane i dały pożądane efekty w postaci aprobaty czytelników bloga. Można stwierdzić, że wzrost efektywności w mediach przekładał się na utrzymanie konkurencyjnej pozycji firmy. Media społecznościowe stały się skutecznym narzędziem w rękach reklamodawców, w czym udział miały także blogerki modowe, które dzięki wieloletniej działalności w sieci zbudowały potężne społeczności. Konsekwencja i upór w budowaniu swojej pozycji w internecie pozwoliły im stać się ekspertkami w branży mody. W ciągu kilkunastu lat (2009–2023) z pasjonatek mody awansowały do roli poważnych blogerek współpracujących z dużymi markami modyowymi. Sukcesy odnoszone w Polsce i za granicą przyczyniły się do wzrostu ich zarobków i rozwoju współpracy ze znanymi markami m.in.: Chanel, Dior, YSL, Adidas Originals, Furla, NAOKO.

Według danych pochodzących z raportu Digital 2023 Poland, w Polsce aktywnie korzystało z internetu 88,4% obywateli, natomiast 66,3% użytkowników sieci korzystało z mediów społecznościowych przez ok. dwie godziny i 2 minuty dziennie. Dane te były przydatne, aby zobrazować, jaki był wpływ reklam pojawiających się w mediach społecznościowych na użytkowników sieci, jak również poznanie ewolucji trendów i zachowań konsumentów. Według tych danych przeciętny polski użytkownik internetu przeznaczał na social media około dwie godziny (w ciągu dnia w internecie spędzał 6 godzin i 42 minuty). Liderem wśród mediów społecznościowych w 2023 roku był Facebook – korzystało z niego 87,5% użytkowników sieci, natomiast z Instagrama 61,5% użytkowników (Digital 2023 Poland, 2023).

Wieloletnia działalność w sieci przyczyniła się do stworzenia marek własnych przez trzy zaprezentowane blogerki. W przypadku Jemerced jej pierwszą marką odzieżową była MOIESS SWIMWEAR (założona w 2017 roku). Rozwój jej bloga przyczynił się do budowy wizerunku blogerki jako ikony stylu. Influencerka dostrzegła możliwość rozwoju i postanowiła rozszerzyć zasięg swojej działalności, wkraczając na nowy obszar działań, jakim było założenie firmy (Kowalska, 2017). Po udanym debiucie pierwszej firmy blogerka zdecydowała się na poszerzenie swojej idziałalności o kolejną markę – tym sposobem na polskim rynku w 2018 roku zadebiutował Veclaim. Firma blogerki została pozytywnie odebrana przez społeczności użytkowników internetu. Fashionistka długo i systematycznie pracowała na swoją pozycję w branży mody, do dziś pozostaje wierna swoim przekonaniom, eksperymentując ze stylem. Czytelnicy pokochali jej bloga za unikalny charakter i styl (Posełek, 2018).

Ciesząca się największą popularnością Kuczyńska także postawiła na firmy modowe. W 2012 roku założyła firmę Staff by Maff, którą stworzyła we współpracy z koleżanką, Martą Gajewską. Ubrania Staff by Maff cieszyły się uznaniem wśród obserwatorów Kuczyńskiej (Dąbrowska, 2013). Marka nie przetrwała jednak próby czasu, a blogerka nigdy nie wyjawiała, co było bezpośrednią przyczyną zakończenia działalności. W 2019 roku na rynku pojawiła się marka Eppram. Początkowo nikt z internautów nie wiedział kto stoi za tajemniczą, zyskującą uwagę marką. Dopiero po kilku miesiącach założycielki – Kuczyńska i Lana Nguyen ujawniły, że Eppram jest ich dziełem. Niespotykana strategia była tłumaczona przez Maffashion w ten sposób:

Od początku moim i Lany założeniem było, aby marka obroniła się sama i sama zapracowała na swój sukces. PR nieodbywający się za pośrednictwem moich zasięgów okazał się wystarczający, aby marka miała świetny start. Otrzymałyśmy bardzo dobry feedback ze strony naszych klientów i to jest dla nas najważniejsze (FASHIONPOST, 2020).

Firma modowa w stosunkowo krótkim czasie zyskała uznanie na polskim i zagranicznym rynku. Niestandardowe i ryzykowne podejście do promocji okazało się sukcesem, a blogerka zyskała w oczach krytyków, nie wykorzystując do promocji swojego nazwiska, co pozwoliło na szczerze opinie konsumentów. Marka zasłynęła z ponadczasowych i funkcjonalnych kolekcji, charakteryzujących się jednak nowoczesną formą. Można powiedzieć, że marka Eppram zasłynęła z minimalizmu, odwagi, funkcjonalizmu i indywidualizmu. DNA marki doskonale współgrało ze stylem Maffashion, czyniąc ją autentyczną (Budzik, 2020). Ryzykowna strategia marketingowa przyniosła jednak zadowalające efekty. Niemniej współcześnie nawet dobre marki potrzebują kreatora. Maffashion była świadoma tego, że wraz z ujawnieniem, iż to ona jest współzałożycielką firmy Eppram, zwiększy zainteresowanie tą marką, przyciągając swoją społeczność. Bloger stał się w tym przypadku kreatorem opowieści marki, bazując na doświadczeniach konsumentów.

W kwestii prowadzenia firmy znacząco wyróżniała się Paulina Jagodzińska. Blogerka świadczyła usługi z zakresu marketingu i PR dla firm (Wchal, 2014). W 2016 roku stworzyła autorską markę modową – DREAMLAND by Paula Jagodzińska. Z uwagi na różnorodną tematykę bloga oraz miłość do podróży, kolekcje ubrań były utrzymane w sportowym i funkcjonalnym stylu. Kampanią reklamową marki zajęła się sama, publikując na swoim blogu zdjęcia kolekcji

ubrań (blog paulajagodzińska.pl, 2016). Działania te spotkały się z dużą aprobatą odbiorców. Po sukcesie pierwszej kolekcji, w 2017 roku zaprezentowano nową odsłonę produktów, rozszerzoną o kubki podróżnicze z motywem kolekcji ubrań (blog paulajagodzińska.pl, 2017).

Od 2019 roku Jagodzińska rozszerzyła działalność o prowadzenie sklepu internetowego, który był mocno związany z treściami prezentowanymi na blogu. Oferowano tam fotografie wykonane podczas podróży w odległe zakątki świata. Dodatkowo dostępne były e-booki o różnorodnej tematyce: kulinarnej, podróżniczej, promujące różne formy aktywności, np. jogę (@paula_jagodzińska, Instagram). Jagodzińska dzięki swojej blogowej działalności zyskała duże doświadczenie w kwestii prowadzenia kampanii PR dla firm. Pozwoliło to na efektywniejsze działania promocyjne własnej marki na blogu, bez konieczności zatrudniania dodatkowych osób. Szerokie spektrum produktów, jak i tematyki bloga sprawiało, że mogła liczyć na zainteresowanie zróżnicowanej klienteli. Działalność prowadzona przez Jagodzińską w latach 2011–2023 jest świetnym przykładem na to, że tematyka lifestyle nie zamyka się na treściach mocno powiązanych z modą. Jej współpraca z marką modową NAOKO udowodniła, że tematyka podróżnicza i modowa mają ze sobą dużo wspólnego (blog paulajagodzińska.pl, 2018).

Biorąc pod uwagę specyfikę blogosfery i marek modowych, należy skoncentrować się na kwestiach kreowania tożsamości i umiejętnego zarządzania. Po przeprowadzeniu analizy decyzyjnej stwierdzono, że wybrane przykłady łączy silny kapitał marki. To od wartości i osobowości kreatora treści uzależnione było jej postrzeganie w oczach konsumentów. Współcześnie blog jest dobrym narzędziem reklamowym, odpowiedzialnym za wyróżnienie marki wśród konkurencji.

Podsumowanie

Blogi w początkowej fazie działalności stały się popularną formą komunikacji, charakteryzowały się tym, że miały formę dłuższych tekstów dotyczących wybranej branży. Wraz z pojawieniem się mediów społecznościowych popularność blogów nie rozwijała się już tak dynamicznie. Social media opierały się głównie na przekazie wizualnym opatrzonym krótką informacją tekstową, co spotkało się z dużą aprobatą użytkowników internetu. W latach 2009–2023 widoczne było stopniowe odejście od blogów. Obecnie zauważalna jest współpraca pomiędzy markami a twórcami internetowymi – Instagram, Facebook, czy YouTube stały się świetnymi kanałami informacji. Blogerzy często, w celach promocyjnych, decydowali się na powielanie treści publikowanych na blogach. Dzięki temu użytkownicy korzystający z internetu szybciej wyszukiwali interesujące ich zagadnienia. Był to dobry sposób na przekierowanie na bloga, biorąc pod uwagę sprecyzowaną tematykę.

Blogi modowe były skutecznym narzędziem do promowania marek w sektorze mody. Dynamika zmian w przestrzeni społeczno-gospodarczej oraz nieustanny rozwój technologii zapoczątkowały ewolucję dotychczas znanych mediów. Wzajemne korelacje i współdziałanie pozwalało na skuteczną promocję osoby bądź marki na wielu platformach jednocześnie. Odnosząc się do blogerów modowych, to właśnie dzięki mediom społecznościowym mogli zaprezentować swoje życie prywatne, co cieszyło się dużym zainteresowaniem odbiorców. Dzięki takim zabiegom bloger był w stanie nieustannie zwiększać swoją społeczność, co przekładało się na coraz większe zasięgi,

zaangażowanie i lojalność. Zaletą mediów społecznościowych była możliwość promowania bloga poświęconego konkretnej tematyce, gdzie można zamieścić więcej specjalistycznej wiedzy niż na profilach typu Instagram. Serwisy społecznościowe zazwyczaj łączą tematykę głównych zainteresowań właściciela konta z treścią poboczną, jaką bywają migawki z życia prywatnego. Analiza materiału badawczego wykazała, że media społecznościowe i blogi wzajemnie sobie nie zagrażają, są natomiast współzależną formą promocji w internecie. Zwiększająca się liczba obserwujących blogerki determinowała ilość propozycji współpracy, które otrzymywały od firm. Działania te przyczyniły się do budowy własnych dobrze prosperujących marek.

W dobie technologii cyfrowej oraz zmieniającej się sytuacji gospodarczej coraz więcej firm stawia na współpracę z blogerami. Branża mody jest rozległa i bardzo konkurencyjna, oferuje jednak wiele możliwości twórcom treści. Wzrost sprzedaży przez internet wiąże się z potrzebą znalezienia dobrego kanału „dojścia” do konsumenta. Blog jako kanał informacyjny ma w sobie ogromny potencjał, który jest doceniany przez marki modowe.

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Internet, nowe technologie i AI w budowaniu widoczności badaczy – przyczynek do badań nad innowacyjnością sposobów upowszechniania nauki na przykładzie badaczy w dziedzinie nauk społecznych

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Słowa kluczowe nowe technologie, nauki społeczne, politologia, upowszechnianie nauki, komercjalizacja nauki, ocena wpływu działalności naukowej na funkcjonowanie społeczeństwa i gospodarki

Abstrakt Spotykamy się z różnymi postawami – od: „jestem skazany na współpracę”, po – „nie potrzebuję internetu, nowych technologii i AI do popularyzacji nauki”. Niemniej, niezależnie od indywidualnych ocen, rośnie znaczenie cyfrowych form upowszechniania wyników badań i dzielenia się wiedzą. Czy w dziedzinie nauk społecznych jest to trend prowadzący od fakultatywności do obligatoryjności wykorzystania nowych technologii w pracy badawczej? W artykule przedstawiono wyniki badań przyczynkowych nad wykorzystaniem nowych technologii, internetu i AI w popularyzacji, upowszechnianiu czy komercjalizacji badań społecznych. Omówiono ich wykorzystanie na przykładzie konkretnych cyfrowych rozwiązań. Zwrócono także uwagę na źródła zdobywania wiedzy o innowacyjności w popularyzacji nauki.

Internet, new technologies and AI in building visibility of researchers – a contribution to the study of innovation of ways of disseminating science with the example of researchers in the social sciences

Keywords new technologies, social sciences, political scientist, dissemination of science, commercialization of science, evaluation of the impact of scientific activities on the functioning of society and the economy

Abstract From the approach of “doomed to collaboration” to “I don’t need the involvement of the Internet, new technologies and AI at all in the popularization of science”. The importance of sharing knowledge and digitizing ways of disseminating research results is growing. In the field of social sciences, is this trend from optional to mandatory use of new technologies in research work? The article presents the results of causal research on the use of new technologies, the Internet and AI in the popularization, dissemination or commercialization of social research. Discussed – the use on the example of specific digital solutions and also the sources of gaining knowledge about the innovation of popularization of science.

Wprowadzenie

Heraklit był przekonany o zmienności rzeczy w przyrodzie – nie był jednak w stanie przewidzieć, jak bardzo zmieni się rzeczywistość – już nie tylko analogowa, ale także cyfrowa ulega nieustannym przeobrażeniom. Jego *panta rhei* ma zastosowanie nawet w zobowiązanej do powtarzalności przeprowadzanych doświadczeń nauce.

Początki karier wielu współczesnych naukowców miały miejsce w okresie, gdy jeszcze nie było internetu i sztucznej inteligencji (*artificial intelligence*, AI). O ile można dyskutować nad równoważeniem się szans i zagrożeń, które są ich efektem, ich wpływ na współczesny świat jest oczywisty. Dla przedstawicieli nauk społecznych eksplorujących świat, w którym nieustannie pojawiają się nowe trendy i technologie „przepływające” między sektorem komercyjnym a publicznym i obywatelskim, obowiązkowe wręcz wydaje się być uwzględnianie powyższych czynników. Teza ta wydaje się truizmem, gdyż nie tylko w dużych i znaczących ośrodkach naukowych dostrzeżono konieczność zaprzęgnięcia na potrzeby nauki obecnych w wielu sferach życia społecznego metod i narzędzi wpływających na obszar badawczy i komercjalizacyjny nauki. Niebagatelne znaczenie miałyby odpowiedzi na szczegółowe pytania badawcze: Jak nowe technologie wpływają na człowieka jako obywatela, wyborcę, część społeczeństwa? Jaki jest udział AI, IT w kreowaniu polityk publicznych? Jakie elementy rozwoju technologicznego mogą być wykorzystywane w naukach społecznych? Jaki potencjał badawczy kryją w sobie ogromne ilości danych, tzw. *big data* i *open sources* dla badaczy społecznych? W jaki sposób wykorzystać internet i media społecznościowe do komercjalizacji i upowszechniania wyników badań? Jak nowe technologie wpływają na społeczny materiał badawczy? Jak wzbogacić o nowe umiejętności z pogranicza informatyki badaczy nauk społecznych, by nowe technologie poszerzyły ich warsztat badawczy i umożliwiły skuteczniejsze upowszechnianie ich wyników? W każdej z dyscyplin należących do tej dziedziny naukowej można by wskazać mnogość nowych, pojawiających się analogicznie do coraz szybszych zmian zachodzących w świecie cyfrowym, problemów badawczych.

Celem poniższego przyczynku do badań, jest wykorzystanie obserwacji, *desk research* i analizy danych zastanych, aby odpowiedzieć na pytania:

1. W jaki sposób wykorzystuje się internet, sztuczną inteligencję (AI) i nowe technologie do upowszechniania nauk społecznych?
2. Które z istniejących elementów cyfrowej rzeczywistości i nowych technologii mogą sprzyjać badaczom w ich karierze naukowej, które natomiast wspomogą proces komercjalizacji i upowszechniania działalności naukowej?

Nowe technologie, internet i AI – przykłady wykorzystania w upowszechnianiu i popularyzacji nauk społecznych

Biorąc pod uwagę sformułowaną tezę, istotne będą te obszary nowych technologii, które w sposób nowatorski, jeszcze niebędący powszechnym standardem w środowisku badawczym i akademickim w obszarze nauk społecznych w Polsce, wspomagają działalność upowszechniającą

naukę. Nowe technologie, AI czy internet pojawiają się coraz częściej jako przedmiot badań w naukach społecznych, o czym świadczą m.in. prace Siudy i Wasylczyka (2018), Łachacza (2022), Borowskiej i Rozworskiej (2022), Majorka (2018), Hoffmana i Karpiuka (2022) i innych. Warto zauważyć, że wciąż niewiele jest badań traktujących o powyższych elementach jako o części warsztatu badacza (szczególnie dla nauk społecznych, co zasługiwałoby na odrębne badania) ani też w zakresie komercjalizacji czy upowszechniania nauki (poza wyjątkami przytoczonymi w dalszej części pracy)¹.

Zgodnie z przyjętą formułą wypowiedzi (wstęp do badań), nie zdecydowano się na kompleksowy przegląd stanu badań i literatury czy wskazania badaczy skutecznie wykorzystujących w naukach społecznych wspomniane aspekty, ograniczono się jedynie do prezentacji wybranych przykładów. Wskazane i wymienione zostaną natomiast konkretne techniki oraz narzędzia potwierdzające tezę o konieczności zaangażowania nowych technologii w naukach społecznych. Wydaje się, po pobieżnym rozpoznaniu, że zastosowanie nowych technologii w tej dziedzinie może się okazać trudniejsze niż w przypadku nauk ścisłych, gdzie nowe rozwiązania „wpisane” są w narzędzia i techniki badawcze i pomiarowe. Należy zaznaczyć, że problematyka zastosowania nowych technologii, internetu oraz AI jako elementu warsztatu badawczego w naukach społecznych, w szczególności w omawianej dziedzinie, nie zostanie tu ujęta, zasługuje bowiem na osobną publikację o charakterze metodologicznym. Dziś nowe technologie wykorzystywane są na każdym etapie pracy badawczej, zaczynając od aplikacji zarządzających bibliografią, tzw. menedżerów bibliografii² (np. dwa najpopularniejsze – Zotero, Mendeley) i wspomagających porządkowanie i grupowanie danych (np. Evernote), czy tworzących narzędzia badawcze, jak różnorodne kreatory ankiet (choćby autorstwa potentatów cyfrowych: Google Sheets czy Microsoft Forms), poprzez analizę danych zebranych i zastanych (tu m.in. oprogramowania komputerowe będące pochodną metod i oprogramowania do analizy danych jakościowych oraz analizy tekstu jak QDA Miner) lub prezentację wyników (tu wymienić można chociażby takie aplikacje pomocne w tworzeniu prezentacji i posterów naukowych jak: Canva³, Prezzi, Focusky, Slidebean, Genially). W tekście omówione zostaną natomiast zagadnienia odnoszące się do nowoczesnych

¹ Część opracowań dotyczących powyższego zagadnienia, czyli nowych kanałów upowszechniania dorobku naukowego i popularyzacji nauki (blogi, vlogi, własne kanały w mediach społecznościowych itp.), to teksty o charakterze popularnonaukowym (znacznie mniej jest monografii naukowych).

² Menedżery bibliografii są narzędziami (aplikacjami bądź oprogramowaniem) pozwalającym gromadzić i zarządzać danymi o wykorzystanych materiałach (artykułach, książkach, rozdziałach, stronach internetowych itd.). Menedżery pozwalają na generowanie opisów bibliograficznych według wybranego standardu, wstawianie odnośników i bibliografii załącznikowej, eksport opisów w różnych stylach cytowań, w zależności od wymogów wydawnictwa (oraz szybką zmianę zastosowanego stylu cytowania w inny). Przyspieszają techniczne prace nad publikacją naukową i pozwalają na archiwizację własnych publikacji.

³ Ta popularna aplikacja dostępna przez witrynę lub w wersji na smartfona, oferuje bezpłatny (lub w szerszej ofercie płatny) dostęp do edytowalnych kategorii wzorów, m.in.: infografika, wykres, okładka książki, mapa myśli, plakat, raport, oferta marketingowa, CV, ulotka. Wymogi techniczne wzorców dostosowane są do publikacji w konkretnych mediach społecznościowych. Innowacyjną funkcją wykorzystującą AI jest użycie technologii „Text to Imige”, która generuje obraz na podstawie dowolnego wpisu. Możemy np. umieścić zdanie, będące wnioskiem badawczym, które w wybrany przez nas sposób (można wybierać między stylami: „fotografia”, „rysunek”, „malarstwo”, „trójwymiar”, „deseń”, „grafika koncepcyjna”, „zaskocz mnie”) zostanie wygenerowane (przekonwertowane przez AI) graficznie.

sposobów i kanałów promowania owych wyników, wspierających ich widoczność i możliwości zwiększenia wpływu społecznego. Dlaczego? Za pewnik uznano, że promocja, upowszechnianie i komercjalizacja nauki nie są jedynie ustawowym wymogiem, stanowią bowiem istotę działalności naukowej i samoświadomości badaczy, choćby ze względu na rolę, jaką pełnią w społeczeństwie.

W trakcie prac dostrzeżono, że jedna z hipotez sformułowanych w formie pytania: które istniejące elementy cyfrowej rzeczywistości i nowych technologii mogą sprzyjać badaczom w ich karierze naukowej, wymaga rozszerzenia. Pierwsze ujęcie było zbyt wąskie (wskazywano media społecznościowe), dlatego zostało uzupełnione o elementy nowych technologii. Zwrócono uwagę, że przez nowe technologie należy rozumieć rozwiązania, które funkcjonują/są wykorzystywane nie dłużej niż 5 lat (Uniwersytet Ekonomiczny w Krakowie, 2022), można przyjąć, że sam internet, po uwzględnieniu zmian dotyczących chociażby ilości i jakości danych, które co chwila następują w jego obszarze, na potrzeby tego opracowania zostanie uznany za nową technologię. Choć przestrzeń internetu, wbrew pojawiającym się w orzecznictwie i doktrynie poglądom, nie jest miejscem publicznym (Dorochowicz, 2019), to z pewnością jest sferą publiczną w rozumieniu Habermasa (2007), w obrębie której następuje upublicznienie swych przekonań i ich wymiana w formie dyskursu.

W cyberprzestrzeni funkcjonują kanały, które są przeznaczone dla badaczy, pozwalające na zbudowanie sieci relacji, pozyskanie partnerów badawczych, zapoznanie się z aktualnymi wynikami badań, to m.in. charakterystyczne dla nauk społecznych: Researchgate, Academia.edu, i międzydyscyplinarne Google Scholar, Scopus, Ebscohost, Web of Science, DOAJ. Z myślą o badaczach i efektach i pracy – publikacjach naukowych – uruchomiono cyfrowe bazy danych, takie jak Nauka Polska (<https://nauka-polska.pl>), jako najstarsza baza danych Ośrodka Przetwarzania Informacji – Państwowego Instytutu Badawczego (O Nauce Polskiej, 2022) czy Polska Bibliografia Naukowa (<https://pbn.nauka.gov.pl>)⁴. Z nimi zapoznają się jednak osoby ze środowisk naukowych, dlatego dla upowszechniania swoich wyników badań, zbudowania marki własnej, takie rozwiązania mogą być niewystarczające.

Teza, że rozwój kariery naukowej koreluje z rozwojem działalności naukowej badacza (m.in. zwiększaniem ilościowym i jakościowym pozyskiwanych grantów i przeprowadzanych badań, wydawanych publikacji) nie wymaga komentarza, w związku z tym należy zweryfikować hipotezę, że internet i nowe technologie są pomocne w rozwoju działalności naukowej badacza.

Równocześnie w tej samej cyberprzestrzeni znajduje się znacznie więcej miejsc, które odwołują się nie tylko naukowcy (przedstawiciele wielu sektorów – publicznego, gospodarczego, NGO), stąd rośnie ich upowszechniająca i marketingowa rola. Nowe media poprzez aktualizacje samych aplikacji, ale i funkcji udostępnionych użytkownikom, zaliczyć można do nowych technologii. Nowe media jako efekt rozwoju technologii komputerowych zacierają dawne granice między nadawcą a odbiorcą w procesie komunikowania – w erze cyfrowej każdy może być

⁴ Polska Bibliografia Naukowa to portal Ministerstwa Edukacji i Nauki gromadzący informacje o publikacjach polskich naukowców, dorobku publikacyjnym jednostek naukowych oraz o czasopismach polskich i zagranicznych. Stanowi część Zintegrowanego Systemu Informacji o Nauce i Szkolnictwie Wyższym POL-on.

nie tylko odbiorcą treści, ale także twórcą *contentu* poprzez dzielenie się przez uczestników społeczności określonymi treściami (Skrzypczak, 2022), autorskimi bądź zaobserwowanymi w medium. Badacze mogą wykorzystywać media społecznościowe zarówno do promowania i upowszechniania nauki, jak i budowania własnej marki. W Polsce do najpopularniejszych, mających największą liczbę użytkowników, zalicza się kanały tzw. social mediów: Facebook, YouTube, Instagram, Twitter, Pinterest, TikTok, LinkedIn (Bokowy, 2022)⁵. Każdy z nich wyróżnia przede wszystkim forma prezentowanych treści (Facebook to „słowo i obraz”, YouTube – film, Instagram bazuje na obrazie, a TikTok na krótkich formach wideo), choć mają też wiele cech wspólnych. Na tym tle wyróżnia się LinkedIn (istniejący od 2003 r. międzynarodowy portal społecznościowy), który, według założeń twórców, ma ułatwiać użytkownikom nawiązywanie profesjonalnych kontaktów zawodowo-biznesowych, a pracodawcom zamieszczanie ofert pracy i wyszukiwanie kandydatów. Znane są jednak przypadki wspomagania się w wyszukiwaniu współpracowników do zespołów badawczych za pomocą tego serwisu. Umożliwia on dokumentowanie kolejnych etapów kariery zarówno pracownikom sfery biznesowej, jak i nauki, a także szukanie nowych możliwości rozwoju zawodowego.

Zamieszczanie treści na wymienionych kanałach nie wymaga zaawansowanych umiejętności informatycznych czy językowo-stylistycznych. Przyjazne i intuicyjne interfejsy najpopularniejszych aplikacji umożliwiają, a nawet „podpowiadają” kolejne kroki tworzenia wpisu czy publikowania treści. Pod względem stylistycznym z pomocą przychodzą już nie tylko wbudowane w aplikacje słowniki, ale i narzędzia przeznaczone do sprawdzania poprawności językowej, dostosowane do pisania tekstów o charakterze akademickim (np. Writefull). Warto jednak zwrócić uwagę, że charakterystyczny dla rozpraw naukowych język i styl, nie zawsze koresponduje z wypowiedziami zamieszczanymi w nowych mediach. Tu przydatne okazują się te narzędzia AI – aplikacje – wykorzystywane także przez branżę marketingową, np. na blogach, w e-mailach i reklamach w mediach społecznościowych. Mechanizmy te korzystają z Deep Learning (zaawansowanego rodzaju uczenia maszynowego). Wśród najpopularniejszych narzędzi dla branży marketingowej wymienia się: Jarvis, CopyAI, Zyro. Na wyróżnienie zasługuje generator Rytr.me, który pozwala tworzyć różnego rodzaju treści – wpis na blogu, treści poradnikowe, posty w social mediach, jednak niewątpliwą zaletą tego AI jest możliwość wpisania kilku słów kluczowych, np. z abstraktu, by automatycznie utworzony został tekst zgodny z wybraną tematyką, pozbawiony jednak zaawansowanego naukowego „żargonu”. Internet i media społecznościowe to nie tylko słowo pisane, w związku z tym podobnie interesujące jest wykorzystanie AI do zbudowania obrazu na podstawie podanych słów kluczowych – takie działanie umożliwia aplikacja „Text to Image” w obrębie Canvy.

Odmianą platform społecznościowych będą niektóre darmowe komunikatory internetowe, bazujące na chmurze obliczeniowej. Przez posiadanie zbliżonej do mikroblogów funkcjonalności służą za medium popularyzujące autorów, umożliwiając jednocześnie tworzenie tzw. grup zainteresowań czy kanałów (np. kanał Sykulskiego: t.me/Sykulski na Telegramie).

⁵ Listę tę można by uzupełnić o nowe trendy, aplikacje pozwalające stworzyć przewagę przez wykorzystanie efektu świeżości i bycia jednym z pionierów w zyskującym popularność medium, jak ClubHouse czy BeReal.

Coraz większą popularnością, także wśród badaczy nauk społecznych, cieszą się platformy streamingowe – w rankingach przoduje Spotify – cyfrowy serwis do odtwarzania muzyki, podcastów i filmów, który zapewnia natychmiastowy dostęp do milionów utworów i innych treści (Spotify.com). Podstawowe funkcje, takie jak odtwarzanie muzyki czy podcastów (nagrań audio – najczęściej są to wywiady lub wypowiedzi monologowe) są bezpłatne, lecz dostępna jest też płatna wersja z szerszym katalogiem usług: Spotify Premium. W praktyce autor podcastów jest najpierw ich słuchaczem. Na podstawie wybieranych przez słuchacza podcastów, algorytmy dostarczają rekomendacji związanych z preferowaną dziedziną, co pozwala na nieangażujące naszego czasu poznawanie podobnych do naszych zainteresowań (w praktyce też obszarów badawczych) profili użytkowników. Aplikacja umożliwia także tworzenie i grupowanie własnych kolekcji muzyki i podcastów. Serwis jest dostępny na wielu różnych urządzeniach, w tym: komputerach, telefonach, tabletach, głośnikach czy telewizorach. Właśnie na platformie Spotify swoją internetową agorę znalazło grono badaczy nauk społecznych. Zamieszczenie, po utworzeniu konta, swoich materiałów publicystycznych nie jest skomplikowane, podobnie jak stworzenie treści w postaci pliku audio, dzięki ogólnodostępnym i całościowo lub częściowo bezpłatnym aplikacjom do tworzenia m.in. podcastów⁶.

Interesującym przykładem budowania marki własnej, w przypadku dyscypliny nauk o polityce i administracji (dotyczy to w równym stopniu badaczy i ośrodków naukowych), jest konto Ośrodka Studiów Wschodnich na portalu streamingowym Spotify. Ośrodek Studiów Wschodnich im. Marka Karpia (OSW) to państwowy podmiot prawny zajmujący się monitorowaniem oraz analizą sytuacji politycznej, gospodarczej i społecznej w sąsiedztwie Polski, rozumianym jednak dość szeroko: państwach Europy Środkowej, Północnej i Wschodniej, na Bałkanach oraz na Kaukazie, w Turcji i Azji Centralnej. OSW, jako podmiot ekspercki, oprócz tradycyjnych publikacji, właśnie w podcastach publikowanych m.in. na platformie Spotify (regularnie od 2019 roku) udostępnia debaty związane z wydarzeniami i procesami ważnymi dla świata Wschodu (Podcast). Warto podkreślić, że zadbano, aby w umieszczanych treściach nie dominował styl naukowy, tak więc stały się one zrozumiałe dla przeciętnego odbiorcy. Zgodnie z powszechną praktyką prowadzenia polityki wizerunkowo-marketingowej (a w odniesieniu do nauk społecznych raczej wizerunkowo-komercjalizacyjnej), tworzone treści zamieszczane są jednocześnie (w tej samej lub dostosowanej do danej aplikacji wersji) na innych, popularnych kanałach społecznościowych. W tym przypadku już nie tylko pliki audio, ale także filmy, są udostępniane na koncie OSW na kanale YouTube. Jednocześnie na stronie internetowej można zapoznać się z wykazem wszystkich materiałów promocyjnych zamieszczonych na obu tych kanałach.

Sykulski, jeden z popularyzatorów nauki promujący swą działalność naukową właśnie w sposób marketingowy, zachęca odbiorców do płatnej aktywności, m.in. poprzez afiliację i „podlinkowania” do księgarni zachęca do zakupu własnych publikacji czy – coraz popularniejszej formy wśród nie tylko tzw. wolnych zawodów – dobrowolnego wsparcia autorów. Odbywać się to może w przestrzeni internetu poprzez płatny, istniejący obok bezpłatnego o okrojonej

⁶ M.in.: Free Audio Editor: <http://free-audio-editor.com/>, Wavepad: <http://www.nch.com.au/wavepad/>, Audacity: <http://www.audacityteam.org/>.

zawartości merytorycznej, dostęp do konta w danym medium, jak również poprzez bardziej rozbudowane funkcje własnej strony internetowej, umożliwiające dostęp do publikowanych treści poprzez wpłaty darowizn. Zbiórki pieniężne w postaci darowizn są swego rodzaju uznaniem dla treści publikowanych przez danych autorów, umożliwiając funkcjonowanie coraz popularniejszym, wyspecjalizowanym platformom typu Patronite.pl, które łączą autorów:

z osobami, które chcą wesprzeć ich pasję nie tylko dobrym słowem, ale i finansowo. Patroni wpłacają regularne, comiesięczne kwoty na konto Autorów, a Ci mogą je wykorzystać na potrzeby swojej działalności. Autorzy zyskują możliwość rozwoju, a Patroni – dostęp do wyjątkowych nagród, a także bezcenną świadomość realnego wspierania pasji innych! (Patronite.pl, 2022).

Wracając do nauk społecznych, na platformie Spotify uwagę zwracają konta nie tylko badaczy, ale i kół naukowych – wydaje się, że to idealny sposób na zyskanie rozgłosu na początku swojej ścieżki badawczej i „dotarcia” do rówieśników.

Wszystkie opisane powyżej działania powinny stanowić przemyślaną i spójną strategię budowania marki własnej, tzw. *personal brandingu*. Skąd taka hipoteza *a priori*? Otóż przybierając ton mentorsko-coachingowy można stwierdzić, że:

tak naprawdę, nawet jeżeli nie będziesz się zajmował *personal brandingiem*, to on zajmie się Tobą. Wszystko, co robisz w życiu, składa się na Twoją markę osobistą, więc nie musisz sobie odpowiadać na pytanie: Czy zacznę budować swoją markę? Już ją budujesz, a raczej ona sama się buduje. Ty musisz sobie odpowiedzieć na jedno proste pytanie: czy chcesz budować ją świadomie (Żukowski, 2017).

W erze postępującej cyfryzacji jeszcze trudniej odmówić prawdziwości tej tezie, choć rację ma Smoliński, który zwracając uwagę na nierzeczywisty wymiar cyberprzestrzeni stwierdził, że „budowanie własnej marki powinno się odbywać równolegle w dwóch światach – realnym i wirtualnym” (Żukowski, 2017). Natomiast według Kulczyckiego to właśnie „badacz musi pokazać, że jego praca jest istotna (...). O takich działaniach musimy myśleć sami: kompleksowo nie zrobi tego za nas ani nasza jednostka, ani dział promocji uczelni” (Kulczycki, 2022). Trudno odseparować się zawodowo od zatrudniającej nas uczelni, stąd marka własna powinna być budowana w modelu podwójnym – samodzielnie przez badacza, ale i we współpracy z afiliującymi go jednostkami i podmiotami. Może to być wykaz ekspertów współpracujących z danym podmiotem, zamieszczony na jego witrynie internetowej – nie tylko uwiarygadnia to jego naukową pozycję, ale i ułatwia kontakt podmiotom, które chciałyby nawiązać z nim współpracę. Wydaje się, że dobrą praktyką byłoby konsekwentne promowanie kadry własnej jednostki badawczej i upowszechnianie jej dorobku naukowego. Mogłyby w tym pomóc drobne zmiany na stronach internetowych wydziałów/instytutów, np. oprócz schematycznego układu organizacyjnego i danych kontaktowych warto byłoby umieścić w tym miejscu materiały promocyjne. Może to być skrócony opis sylwetki i osiągnięć badawczych każdego pracownika, obszar zainteresowań, dotychczasowa działalność naukowa i np. ekspercka. Dobrą praktyką, stosowaną w większych polskich ośrodkach akademickich, jest możliwość skorelowania treści zamieszczonych na stronie uczelni z innymi internetowymi bazami. Stosowanie nowych technologii powinno prowadzić

do zmniejszenia nakładu pracy, którą do tej pory wykonywał każdy pracownik, np. uzupełnianie wykazu publikacji byłoby możliwe przy wykorzystaniu zewnętrznych repozytoriów, które aktualizują dane. Na profilu może znaleźć się link przekierowujący do sylwetki badacza, np. do wymienionych już repozytoriów prowadzonych w formie elektronicznej (m.in. Researchgate, Academia.edu). Może to być również cyfrowe repozytorium powołane do zarządzania wiedzą i potencjałem naukowym, gromadzące dorobek swoich pracowników badawczych (jak np. Konstelacja Wiedzy Politechniki Koszalińskiej). Dobrym przykładem może być także projekt Dziedziny Repozytoriów Danych Badawczych (realizowany w latach 2018–2021), w ramach którego powstały trzy otwarte repozytoria danych badawczych. Repozytorium Otwartych Danych RepOD (<https://repod.icm.edu.pl>) udostępniania wszelkiego typu dane badawcze wytworzone, zebrane lub opisane na potrzeby działalności naukowej (Unia Europejska). Z kolei Repozytorium Danych Społecznych RDS (<https://rds.icm.edu.pl>) to kolejna odsłona projektu, mającego na celu stworzenie dziedzinowego repozytorium służącego do otwartego udostępniania ilościowych oraz jakościowych danych społecznych. Dzięki cyfrowej postaci repozytoriów możliwa jest swobodna wymiana metadanych udostępnionych zbiorów z innymi systemami.

Oprócz linku potwierdzającego naszą wiarygodność i bazę dorobku można zamieścić link do własnej witryny internetowej, bloga lub vloga tematycznego czy profili o charakterze zawodowym w mediach społecznościowych, portalach budujących „wizerunek fachowca” w swojej dziedzinie, np. LinkedIn, czy Spotify.

Portale te nie są klasycznymi przykładami mediów społecznościowych, gdyż pierwszy stanowi swoisty zbiór CV, a drugi – portal streamingowy. Wraz z rozwojem udostępnianych funkcji ewoluuje także sposób ich wykorzystywania – tworzą się nowe sieci relacji.

Biorąc pod uwagę działania promocyjne prowadzone przez uczelnię, wskazać można jeszcze inny przykład wspomagania własnych pracowników w popularyzacji ich działalności, np. stworzenie wykazu czy wręcz wyszukiwarki ekspertów z poszczególnych dyscyplin i śróddyscyplin, co umożliwiłoby dziennikarzom, czy innym zainteresowanym osobom, nawiązanie kontaktu z badaczem. Taka baza ekspertów przyczynić się może do zintensyfikowania kontaktów międzysektorowych w sposób bardziej intuicyjny niż przeszukiwanie listy pracowników w BIP-ie czy według katedr (lub innych jednostek organizacyjnych uczelni). Prosty przykład bazy ekspertów w zakresie nauk społecznych jest baza Mass media. Baza ekspertów Wydziału Humanistycznego Politechniki Koszalińskiej (<https://tu.koszalin.pl/wh/kat/811/mass-media-baza-ekspertow-wydzialu-humanistycznego>). Jest to aktualizowany wykaz pracowników jednostki (z ich adresami mailowymi i numerami telefonów), ze wskazanym obszarem badawczym, w którym są ekspertami. W rozbudowanej wersji taka bazę kontaktową prowadzi Uniwersytet SWPS⁷, który na swojej

⁷ Sam uniwersytet w zakresie wykorzystywania nowych technologii w popularyzacji swoich badaczy i działań określa się następująco: „Jesteśmy pierwszą uczelnią na świecie, która umieściła podcasty popularno-naukowe w serwisie Spotify. Organizujemy wykłady otwarte i bezpłatne warsztaty, realizujemy webinary i wideokonferencje, prowadzimy blogi popularnonaukowe dla wszystkich zainteresowanych ekspercką wiedzą o człowieku i społeczeństwie, psychologią, prawem, zarządzaniem oraz designem. Nasze media są regularnie doceniane przez specjalistów z branży edukacyjnej”. Za: <https://swps.pl/my-uniwersytet/jak-dzialamy/zaangazowani> (16.12.2022).

stronie internetowej w zakładce „Współpraca i usługi” wyodrębnia oferty: „Dla biznesu i instytucji”, „Dla mediów”, „Dla naukowców i studentów”, „Dla klientów indywidualnych”.

Kolejnym przykładem potwierdzającym postawioną tezę jest funkcjonowanie wszelkiego rodzaju stowarzyszeń pełniących rolę platformy kontaktu dla badaczy nauk społecznych. Istota powstania tego rodzaju zrzeszeń jest starsza niż sam internet, jednak medium to stwarza nowe, lepsze i szybsze możliwości kontaktu.

Za odpowiedź na postawioną kontrhipotezę o braku korelacji rozwoju ścieżki naukowej i np. skuteczności w pozyskiwaniu źródeł finansowania projektów badawczych może być argument, że „obecność” badacza w mediach społecznościowych nie musi mieć bezpośredniego przełożenia na uzyskanie grantu, jednak zbudowanie silnej marki własnej, jako naukowca, może mieć już bezpośredni wpływ na naszą afiliację i zatrudnieniem w innym ośrodku naukowym, który zapewni lepsze warunki pracy i rozwoju. Można się również pokusić o postawienie hipotezy o potencjalnym pozytywnym wpływie zbudowania marki własnej, obecnej w cyberprzestrzeni, na szansę znalezienia partnerów do wdrożenia wyników naszych badań. Na bazie narzędzi internetowych dostępnych dla marketingu można już wyszukać najpopularniejsze konta naukowców w mediach społecznościowych, jak „Influencer Search Tool” (Free Influencer Search Tool to Find the Top Science Instagram Influencers in Poland). W świetle aktualnych wymogów ewaluacyjnych afiliującej nas jednostki, jest to bardzo istotne, ponieważ trzecim kryterium ewaluacji jest wykazanie wpływu działalności badawczej na funkcjonowanie społeczeństwa i gospodarki. W przypadku nauk społecznych charakterystycznymi podmiotami partnerskimi w tym zakresie będą podmioty sektora publicznego, pozarządowego, biznesu (rzadziej niż w przypadku nauk ścisłych). W pierwszych dwóch sektorach odbiorcami wdrażającymi wyniki badań mogą być podmioty administracji publicznej i jej organy, jednostki samorządów terytorialnych, stowarzyszenia i fundacje, ale też czynni i aspirujący politycy, samorządowcy, partie polityczne – oni wszyscy, będąc podmiotami systemu politycznego, są obecni w cyberprzestrzeni. Wszak nie tylko administracja państwowa posiada swoje konta w mediach społecznościowych – swoją „agorę”, jak i widowiskowe „koloseum” mają różne podmioty.

Zapożyczanie zachowań pochodzących ze świata biznesu coraz bardziej widoczne jest w sposobie upowszechniania nauki. Nowe narzędzia i technologie umożliwiają przedstawienie wyników badań (szczególnie w naukach społecznych) w ciekawy i interesujący sposób, nie tylko dla przedstawicieli środowiska naukowego, ale i dla potencjalnych partnerów gospodarczych, a nawet laików. Popularność zyskują na konferencjach naukowych nowe formy przedstawiania wyników prac badawczych, np. plakat naukowy (Czarkowski, Siwicki, 2015) czy infografiki będące ich częścią. Zmieniają się także formuły konferencji – tu dobrym przykładem mogą być konferencje z cyklu *Falling Walls*, gdzie w sposób niezwykle skondensowany – jednocześnie frapujący i intrygujący – należy zaciekawić niebadaczy danym tematem (trzeba przedstawić meritum problemu w ciągu trzech minut, posługując się trzema slajdami). Sam cykl wydarzeń, poczynawszy od 2009 roku, ma formułę światowego konkursu dla studentów, doktorantów, naukowców, start-upowców, ekspertów od B+R i edukacji (A unique international platform for leaders from the worlds of science, business, politics, the arts and society, 2022).

Należy mieć świadomość, biorąc pod uwagę długość procesu publikacji artykułów naukowych, że w momencie, gdy trafiają do rąk odbiorców, mogą być, przynajmniej częściowo, nieaktualne. W tym przypadku AI (szczególnie aplikacje rodzaju chatów jak Chat GPT, OpenAI, Bard Google czy Bing Microsoft) jest tym narzędziem, które może wkrótce zastąpić i skonsolidować większość wymienionych w artykule, m.in. menedżery bibliografii. W dodatku tempo jej rozwoju każe zastanowić się nad koniecznością kształtowania świadomości, jakie korzyści, ale też zagrożenia, związane są z jej wykorzystywaniem, nie tylko przez środowiska naukowe, ale też przez wszystkich użytkowników⁸. Z pewnością regulacje te powinny obejmować oznaczanie treści stworzonych przy pomocy sztucznej inteligencji, szczególnie na poszczególnych etapach prac badawczych.

Zdobywanie wiedzy o innowacyjności popularyzacji nauki

Skąd badacze nauk społecznych mają czerpać wiedzę na temat nowych technologii, zasad i umiejętności upowszechniania i komercjalizacji wiedzy w internecie? Częściowo może być to efektem szkoleń, które realizowane są przez instytucje ich afiliujące – stąd znajomość narzędzi i technik dydaktycznych transferowana jest do działalności badawczej. Częściej jednak są wynikiem prywatnego doświadczenia obsługi, np. mediów społecznościowych lub doświadczenia z sektora komercyjnego.

Źródłem wiedzy na temat nowoczesnych narzędzi wspomagających sposoby promowania i prezentowania nauki i siebie jako badacza może być publikacja *Sztuka promocji nauki. Praktyczny poradnik dla naukowców*. Jej autorzy uważają, że:

promocja nauki jest sztuką. Nie wystarczy prowadzenie badań i uzyskiwanie rezultatów. Trzeba jeszcze o tym powiedzieć, napisać, trzeba zaprezentować. Realizacja badań naukowych kojarzy się z doskonałością, wysoką jakością, dbałością o każdy szczegół. Tak samo powinniśmy podchodzić do promocji tego, co stworzymy (Osica, Niedzicki, 2017, s. 3).

Należy zwrócić uwagę, że szkolenia z zakresu obsługi najnowszych narzędzi TIK dla osób prowadzących działalność gospodarczą czy dla urzędów administracji publicznej lub polityków (zarządzanie informacją i budowanie własnej marki) są bardzo popularne, o tyle znacznie rzadziej można spotkać szkolenia dla badaczy. Jednym z przykładów dobrych praktyk są cykliczne szkolenia *Akademickie Piątki Przystani Nauki* – wydarzenia online skierowane do naukowców i kadry dydaktycznej zachodniopomorskich uczelni publicznych, realizowane od 17 czerwca 2022 roku do 31 lipca 2023 roku (Pomorze Zachodnie). W trakcie szkoleń, których tematyką jest, m.in. budowanie marki osobistej – *personal branding*, autoprezentacja i wystąpienia publiczne czy *secrets of communication*, poruszane są także kwestie wykorzystywania nowych technologii w pracy naukowej. Podobne założenia leżały u podstaw programu LOGOS, organizowanego w ramach programu *Inicjatywa Doskonałości – Uczelnia Badawcza*. Przyjęto, że będzie miał

⁸ Zagadnienie regulacji normatywnych dotyczących sztucznej inteligencji zasługuje na osobne, szczególnie w zakresie nauk prawnych, opracowanie.

formę cyklu otwartych szkoleń dla społeczności akademickiej Uniwersytetu Mikołaja Kopernika w Toruniu. Program skierowany jest przede wszystkim do studentów i doktorantów tej uczelni. Podczas wykładów i szkoleń uczestnicy programu mogą zapoznać się z zasadami planowania i prowadzenia badań naukowych, a także sposobami organizacji kariery naukowej (Buduj wizerunek i daj się znaleźć, 2022).

Innowacyjną wydaje się być, najszersza w swym zakresie tematycznym, propozycja studiów podyplomowych: broker innowacji – specjalista ds. komercjalizacji nauki, realizowana na Wydziale Nauk o Polityce i Administracji Uniwersytetu Kazimierza Wielkiego w Bydgoszczy. Ta forma poszerzania wiedzy przeznaczona jest dla osób, które interesuje już nie tylko upowszechnianie, ale i komercjalizacja nauki, czyli dla pracowników uczelni wyższych – zarówno zatrudnionych na etatach naukowych, jak i administracyjnych, oraz wszystkich osób, które chcą pozyskać stosowne uprawnienia brokera innowacji – specjalisty ds. komercjalizacji nauki. Komercjalizacja wyników badań naukowych i prac rozwojowych to wszelkie działania polegające na wykorzystywaniu i udostępnianiu wyników badań naukowych i prac rozwojowych w taki sposób, aby umożliwiała to osiąganie korzyści finansowych na zasadach rynkowych (Sikora-Gaca). Komercjalizacja nauki, podobnie jak jej upowszechnianie, jest definicją legalną (Ustawa, 2018, art. 148.1.), stanowi, że uczelnie to centra transferu technologii, które działają w celu komercjalizacji bezpośredniej, polegającej na sprzedaży wyników działalności naukowej lub *know-how* związanego z tymi wynikami albo oddawaniu do używania tych wyników lub *know-how*. O ile szczegółowo określone są zasady formalne prowadzenia tych instytucji, to w przypadku funkcjonowania na pograniczu nauki i sektora biznesu należałoby zwrócić większą uwagę na aspekt wykorzystania metod i technik (badanych przez dziedzinę nauk ekonomicznych, a wykorzystywanych najszerzej właśnie przez sektor biznesu).

Swoją obecność w cyberprzestrzeni zaznaczają również organizacje zrzeszające badaczy z różnych dyscyplin naukowych, poszerzając tym samym przestrzeń informowania o prowadzonej działalności. Ciekawych wyników mogłoby dostarczyć zbadanie, na wzór rynkowy, źródeł pochodzenia informacji o wydarzeniach naukowych, mogłoby się okazać, że coraz częściej nie poczta tradycyjna czy mailowa, a media społecznościowe jako pierwsze informują o planowanych wydarzeniach.

Znaczenie nowych technologii w popularyzacji nauki

Według Natalii Osicy⁹ „Naukowcy chcą współpracować z otoczeniem, tylko nie wiedzą, jak, gdzie i kiedy” (Osica). Zdaniem Zdziebłowskiego (2021) natomiast:

⁹ N. Osica jest założycielką ProScience (proscience.pl), pierwszej w Polsce firmy doradczej, która wspiera naukowców, instytuty naukowe i badawcze oraz uczelnie w budowaniu widoczności, wizerunku i relacji z otoczeniem. Działa w obszarze: a) strategii komunikacji: budowanie polityki informacyjnej z uwzględnieniem wewnętrznych i zewnętrznych interesariuszy; b) audytów komunikacyjnych: analizy rynku i trendów, mapowanie interesariuszy, diagnoza prowadzonych działań; c) wpływu społecznego: dotarcie do pożądaných grup docelowych, inicjowanie i realizacja projektów z zakresu wpływu społeczno-gospodarczego; d) popularyzacji: nagłaśnianie projektów naukowych, w tym wyników badań czy konferencji, dotarcie do pożądaných grup odbiorców; e) biura prasowego: współpraca z dziennikarzami, umieszczanie głosu naukowców i dydaktyków w przestrzeni publicznej, nagłaśnianie działań jednostek

Popularyzacja nauki przez ostatnie 10 lat przeżyła rozkwit. Wśród naukowców jest czymś naturalnym – nawet jeśli nie popularyzują, mają świadomość, czym ona jest i z jakimi aktywnościami się wiąże. Wielu badaczy traktuje popularyzację jako coś rozwijającego. Rozbudowana widoczność krajowych naukowców i ich dokonań w mediach to olbrzymia zasługa służb promocyjnych uczelni, które im w tym pomagają.

Czy naukowiec może pozwolić sobie na to, by nie współpracować z dziennikarzami, nie istnieć w internecie, nie być widocznym w mediach społecznościowych? Z pewnością można nie być obecnym w cyberprzestrzeni. Możliwe, że nie będzie to miało wpływu nawet na nasz rozwój zawodowy. Wpływie zapewne na popularyzację nauki czy zwiększenie zainteresowania wiedzą jako taką – a czy nie o to w naukach społecznych chodzi przede wszystkim?

W Ustawie z 30 kwietnia 2010 roku o zasadach finansowania nauki (Ustawa, 2010, art. 2 ust. 8) tzw. działalność upowszechniająca naukę (DUN) zdefiniowana została jako realizacja zadań wspierających rozwój polskiej nauki przez upowszechnianie, promocję i popularyzację wyników działalności badawczo-rozwojowej, innowacyjnej i wynalazczej, w tym w skali międzynarodowej, a także zadań związanych z utrzymaniem zasobów o dużym znaczeniu dla nauki i jej dziedzictwa, nieobejmujących prowadzenia badań naukowych lub prac rozwojowych. Upowszechnianie wyników działalności naukowej to również część obowiązków pracownika badawczo-dydaktycznego czy badawczego uczelni wyższych. W czasie ostatniej ewaluacji jakości działalności naukowej podmiotów nauki i szkolnictwa wyższego w Polsce dało się zaobserwować wzmożoną intensyfikację działań na rzecz popularyzacji nauki, wynikającą z nowych zasad oceny dorobku naukowego. Ustawodawca zdefiniował ocenę wpływu działalności naukowej na funkcjonowanie społeczeństwa i gospodarki, jako bezpośredni związek między najważniejszymi wynikami badań naukowych, prac rozwojowych lub twórczości artystycznej a gospodarką, funkcjonowaniem administracji publicznej, ochroną zdrowia, kulturą i sztuką, ochroną środowiska naturalnego, bezpieczeństwem i obronnością państwa lub innymi czynnikami wpływającymi na rozwój cywilizacyjny społeczeństwa. Dla badaczy pragnących poprawić jakość działalności naukowej, widoczność i wskaźniki bibliometryczne czy praktyczny i społeczny wymiar działalności naukowej, konieczne wydaje się uwzględnienie nowych technologii, AI czy internetu w swojej działalności.

W Ustawie o szkolnictwie wyższym (Ustawa, 2018) określono badania podstawowe jako te, które prowadzone są bez nastawienia na bezpośrednie zastosowanie komercyjne. Nie wyklucza to jednak dbałości o upowszechnianie całościowej działalności poszczególnych badaczy i ośrodków przy wykorzystaniu nowych technologii. Bujnicki twierdzi, że:

naukowych; f) social mediów: budowanie społeczności w mediach społecznościowych wokół wiedzy eksperckiej i naukowej; g) doradztwa: doraźne i długofalowe wsparcie dla kadry zarządzającej w sektorze akademickim z zakresu komunikacji wewnętrznej i zewnętrznej; h) mentoringów i szkoleń: szyte na miarę programy doskonalące dla służb prasowych i specjalistów ds. popularyzacji nauki. Za: <https://proscience.pl/dla-nauki/> (16.12.2022).

nie można wszystkich naukowców zmuszać do działań biznesowych. Niektórzy (może większość) nie chcą ani nie potrafią tego robić. Chociaż nie prowadzą badań przydatnych przemysłowi, ich praca jest potrzebna w obszarze badań podstawowych, edukacji czy popularyzacji nauki. Naukowcy, zanurzeni w świecie czystej nauki, potrzebują tłumaczy, którzy pomogą w porozumieniu się ze światem biznesu (Tataj, 2015).

W preambule ustawy o zasadach finansowania nauki wprowadzono zapis o dążeniu do poznania prawdy i przekazywania wiedzy z pokolenia na pokolenie jako szczególnie szlachetnej działalności człowieka, dostrzegając w tym fundamentalną rolę nauki w tworzeniu cywilizacji (Ustawa, 2010). Jednocześnie kluczem do osiągnięcia dobrych wyników przez uczelnie i instytuty badawcze, we współpracy z otoczeniem społecznym i gospodarczym, jest ciągle doskonalenie zarządzania działalnością naukową. Nie można przy tym zapomnieć o barierach związanych z nowymi technologiami (Kowalski, Weresa, 2019). Choć mogą wzbogacić sam warsztat badawczy czy metodykę dydaktyki, to nie zawsze rosnący potencjał pozytywnego wpływu tych elementów jest w pełni wykorzystywany. Problemem pozostaje jednak brak wysoko wykwalifikowanych, interdyscyplinarnie wykształconych analityków i badaczy. Dotyczy to szczególnie osób, które swobodnie łączą kompetencje informatyczno-programistyczne z umiejętnościami analityczno-statystycznymi i głębokim, humanistycznym rozumieniem problemów społecznych (Wais, 2013, s. 203 i n.). Nowym, niewystarczająco zbadanym obszarem działalności badawczej pozostaje – coraz szerzej wykorzystywana AI – i to nie tylko w obrębie już istniejących narzędzi jak ScienceDirect. Biorąc pod uwagę rosnące tempo popularności AI w społeczeństwie, należy mieć nadzieję, że próbujące nadążać za rzeczywistością regulacje formalno-prawne dotyczyć będą nie tylko upowszechniania, ale i zachowania etyki badań naukowych.

Podsumowanie

Nie każdy musi być naukowym youtuberem czy influencerem. Trudno jednak wyobrazić sobie warsztat współczesnego badacza społecznego „izolowany” od nowych technologii, co prognozował już Siuda szesnaście lat temu:

wzrost popularności internetowych kwestionariuszy wymusi na badaczach zdobycie odpowiedniej wiedzy i umiejętności informatycznych (...). Powinniśmy starać się pomóc ludziom zrozumieć, czym się zajmujemy, dlaczego to jest ważne i czy może być przydatne (Siuda, 2006, s. 265).

Na podstawie powyższego przyczynku do badań słuszną wydaje się być hipoteza o obligatoryjnym prowadzeniu działań popularyzujących aktywność badawczą, w dodatku niewyobrażalną bez współudziału nowych technologii i internetu. Polityka wyboru strategii budowania własnej marki i obecności w internecie, skali wykorzystania nowych technologii w tym obszarze (czy także w zakresie warsztatu badawczego) jest kwestią bardzo indywidualną. W planowaniu naszej działalności w cyberprzestrzeni należy wziąć pod uwagę wiele kwestii. Zakres naszej cyfrowej tożsamości zależeć może od:

- a) samego badacza (jego osobowości, nastawienia na intro bądź ekstrawertyzm, umiejętności komunikacyjnych – budowanie prostych i skutecznych komunikatów oraz stosowanie pozostałych technik komunikacyjnych);
- b) charakteru jego dyscypliny badawczej (np. w naukach społecznych nie wszystkie dyscypliny są równomiernie reprezentowane – obecne „rozreklamowane” w internecie);
- c) charakteru aktualnych badań;
- d) przygotowania badacza, jego umiejętności ITC;
- e) przygotowania merytorycznego badacza, wartości samego przekazu;
- f) systematyczności, formy i częstotliwości zamieszczania treści (czy chcemy publikować codziennie? czy prezentowane treści będą związane jedynie z badaniami, czy też będą nawiązywały do innych sfer naszej działalności społecznej i prywatnej? czy chcę publikować w kilku wybranych kanałach, czy w wielu);
- g) zakresu „infrastruktury promocyjnej” uczelni (możliwości, jakie daje w omawianym zakresie nasza Alma Mater – czy jest to prosty wykaz pracowników badawczych bez, np. bazy kontaktowej, czy też rozbudowana propozycja promocji własnej badacza);
- h) otoczenia formalno-prawnego (fakultatywności lub obligatoryjności, zakresu popularyzowania działalności badawczej).

Parafrazując Heraklita – świat się zmienia – i niezależnie od nas, badaczy, i naszego subiektywnego podejścia do tego problemu, umiejętność „opakowania” naszej działalności staje się być częścią obowiązków wynikających z charakteru wykonywanej pracy. Dla osób, które zamierzają podnieść jakość swojej działalności naukowej, widoczność i wskaźniki bibliometryczne czy praktyczny i społeczny jej wymiar, niezbędne wydaje się uwzględnienie nowych technologii, AI czy internetu w swojej działalności. Obecność w cyberprzestrzeni pozwala stworzyć sieć współpracy i kontaktów oraz uwiarygodnić nas jako partnerów. Nowe technologie, internet czy AI powinny być naszymi sprzymierzeńcami, a nie powodem do budowania barier (międzypokoleniowych czy światopoglądowych) w środowisku naukowym. Powinny pomagać zarówno w upowszechnianiu, komercjalizacji nauki, jak również w budowaniu marki osobistej i indywidualnej ścieżki naukowej.

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Cytowanie

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Implications of population growth on unemployment in Nigeria: Testing the Malthusian and Keynesian Theories

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Abstract

This study was conducted to determine if it is Malthusian theory that viewed population growth as depressing employment opportunity, or Keynesian theory that supports the view of population growth enhancing employment opportunities that holds in the population and unemployment relationship in Nigeria within the period of 1981 to 2019. Data on age dependency and working-age population ratio were used to measure population growth, with unemployment rate as the explained variable. The datasets were sourced from the World Development Indicator database. The study employed the ARDL approach to cointegration to determine the long-run relationship of the variables. The results of the analysis show a long-run relationship between population and unemployment growth rate in Nigeria. Population growth was shown to be capable of significantly reducing unemployment in the long run thereby upholding the proposition of Keynesian theory of unemployment. However, the effect was shown to be the other way in the short run, thereby supporting the proposition of the Malthusian theory of population. The study therefore posits that the effect of population on unemployment is time variant. It is therefore recommended that the government of Nigeria should improve the quality of her population through education and health in order to be able to reap the gain in the future as population grows. Also, the potentialities in the growing population could be harnessed through increased aggregate demand when the government of Nigeria uses his fiscal stance to enhance the people's income.

Introduction

The world is generally witnessing a rapidly growing population. It was reported that the world population, which was seven billion in 2011, was estimated to exceed nine billion by 2050 (UNCTAD, 2011), and that about 855 million people out of this population reside in the LDCs. Nigeria, being a giant of Africa is not left out in the phenomenal growth of population. In fact, according to National Population Commission (2016), the nation Nigeria has one of the fastest growing rates of population in the world with a rate of growth of about 2.44% per year. In 2016, Nigeria's population was reported to be 182.2 million (National Population Commission 2016). Worldometer's elaboration of the latest United Nations data reported the current population of Nigeria as at March 2023 to be 219,725,930 (www.worldometers.info). This report shows the country's population to have increased from 41,086,100 at the rate of 1.65 percent in 1955 to 219,725,930 at the rate of 2.6 per cent in 2023. The country is also reported to account for one-five of Sub-Saharan Africa's population and to be the most populous country in Africa.

With its high and rapidly growing population, there are consequences of further increase in population in Nigeria in the future, and also there are implications of this on the socio-economic aspect of life of people in the country (Olusogo et al., 2018). Growing population is gainful when it approaches demographic dividend stage, when the bulge of crowded youth of the nation is engaged in productive activities (Bloom, 2001). Nigeria's growing population has rather been confronted with differing economic challenges, making it of a great concern to the stakeholders and policy makers. A major challenge is that of rising labour force as a result of a bulge of increasing working-age population. In the face of less than commensurate job creation, a substantial chunk of population is bound to remain unemployed.

There is overpopulation when the carrying capacity of the environment of a country is relatively lower than its human population. The carrying capacity in this case is the employment level, which is relatively lower to absorb the available labour force. There is unemployment as a result of insufficiency of the available jobs to meet the growing population.

With a high dependency burden which is associated with a young-age structured population due to rapid growth, savings and investments become low, which in turn generates a vicious circle that lead to low economic growth and a low standard of living. The effects of the growing pool of labour force on employment opportunities has therefore been a major concern, making it a worthwhile research effort to examine how the rapidly growing population in Nigeria has contributed to the scarcity of sufficient employment opportunities in the country. World Bank (2018) reported the trend in the movement of unemployment rate in the country, where the rate was recorded to have fallen from 6.0% in 1991 to 5.4% in 1994, after which it was sustained at a rate of 4.1% from 1995 to 2007 before up surging to 15.7% in 2008. According to the report, the rate went down to 8.9% in 2011, after which it rose to the alarming rates of 15.7% and 19.1% between 2015 and 2016. By the end of September 2018, the proportion of Nigerian's workforce without employment has risen to 23.1% (World Bank, 2018). Trading economics, (2014) also showed how unemployment rate in Nigeria has been on the rise from 5.0% in 2006 to 5.3% in 2007, after which it subsequently increased to 5.8%, 11.8%, 19.7%, 21.1%, and 23.90% respectively in 2008,

2009, 2010, 2011, and 2012. However, the economically active population (15–64 years of age) was reported to have increased from 111.1 million in Q3, 2017 to 115.5 million in Q3, 2018 (NBS, 2018). The World Bank noted that Nigeria has her worst unemployment crisis in recent times with an estimation of 33.3 per cent in 2020. The report, which was published by the World Bank with support from the Korea World Bank Partnership Facility (KWPF) and the Rapid Social Response (RSR) trust funds, noted that the nation's expanding working age population combined with scarce domestic employment opportunities is creating high rates of unemployment, particularly among the youth in the country.

There is an implied imbalance between supply side of labour and the demand side for labour, resulting in unemployment and underemployment. The employment problem shows the extent to which a nation's labour supply is not matched by her labour demand or job opportunities. Thus, population is seen as a supply factor, while the country's economic situation is considered a demand factor.

Unemployment is such a critical and central issue in any nation, and it is capable of dictating the social and economic life of everyone in the country (Ajie et al., 2018). According to the World Bank, (2017), unemployment is a menace which is capable of deepening poverty incidence and spreading indecent standards of living among the people of any nation. It has been one of the major problems among the myriad of economic malaise bedevilling Nigerian economy, and this has explained the slow pace of its growth rate and has been a hindrance in its way to the attainment of sustainable development. The recent upsurge in public violence, insurgency, high crime rate, etc., in Nigeria are adjudged to be products of unemployment, with a rapidly growing population as greater percentages of the perpetrator of the crimes are unemployed skilled potential labour force members.

Literature

The relationship between population growth and economic performances, as it reflects on employment level changes have remained controversial. This model could be determined by examining the dilemma of two contradictory models of Malthus and Keynes.

Malthus (1798), in his thesis on the relationship between population growth and economic performance, famously argued a recurrent theme in economic analysis, postulating that living standards would be depressed in the long run as population continued to grow geometricaly while the supporting resources grew arithmetically. The theory assumed that, given a fixed quantity of land, population growth will eventually reduce the amount of resources that each individual is entitled to, and this will ultimately result in shortages and lack. Economists viewed high birth rates and rapid population growth particularly in poor countries as being capable of diverting scarce capital away from savings and investment, placing a drag on economic performances (Coale & Hoover, 1958; Kuznets, 1960). With high population growth in the economy, the number of job searches increases, giving rise to job scarcity and hence, high unemployment rate. Malthus thus recommended 'moral restraint' as a way of avoiding such unfortunate outcomes. However, he was criticized for not foreseeing the technological advances that could

raise agricultural productivity and reduce the depression to standard of living. Nevertheless, the essential insight provided by the thesis, still makes its relevance in decrying that population growth constitutes a potential threat to economic development. These insights have informed the international development policy agendas, especially in the 1950s and 1960s, which was a period marked by unprecedentedly rapid rates of population growth in many developing countries.

Conversely, Keynes (1936) developed the Cyclical or Keynesian Theory of Unemployment which is also known as demand deficient unemployment in his work “The General Theory of Unemployment”. He proposed that unemployment occurs when the aggregate demand in the economy is deficient or inadequate to generate full employment. According to him, inadequate effective demand as a result of a fall in the demand for most goods and services, gives rise to this type of unemployment. This occurs when the fall in demand for most goods and services reduce the production level, and wages fail to meet the equilibrium level thereby resulting into mass unemployment. Thus, the Keynesian framework postulates that the growth of employment is determined by increased income, which is created from long term growth of output resulting from effective aggregate demand. The growth in the aggregate demand is expected to result from high population growth in the economy, which is capable of increasing the household consumption, and consequently employment level. Keynesian’s view was also supported by Kremerian model, which suggested that world population growth should be seen as a key driver of advancing economic prosperity (Kremer, 1990). According to the model, with increased population, there would be more people as scientists, inventors, and engineers, which would imply increase in the level of innovation and technological progress. This view was also subscribed to by Mankiw (2010). Scholars are therefore still on dangling to press home their points of views on the issue as reflected in the empirics.

Adekola et al. (2016) analysed comparatively the relationship between population growth and changes in unemployment rate in three purposively selected heavily populated countries – Nigeria, China, and the USA. The study showed that unemployment statistics was stable for U.S. and China even with their populations growing, whereas in the case for Nigeria, both population and unemployment are growing. The study concluded that population growth is not the only factor responsible for increase in unemployment in Nigeria, but that there are some other intrinsic factors.

Bakare (2011), making use of econometric analysis of data on Nigeria from 1978 to 2008, found that demand for labour, supply of labour, and population are important determinants of urban unemployment crisis in Nigeria.

O’Nwachukwu (2016) examined the determinants of unemployment rate in Nigeria from 1980 to 2016 within the framework of Keynesian Theory of Unemployment. The study employed Ordinary Least Squares (OLS) technique, and among others showed that growth of population is statistically significant in determining changes in unemployment in Nigeria for the period of the study.

Ominyi (2019) employed Pairwise Granger Causality test to analyse the causal relationship between population growth and unemployment in Nigeria for the period of 1990 to 2018. Population growth rate was proxy by percentage of working population in the country, while

unemployment rate was used to measure the unemployment in the country. The empirical evidence established a bidirectional causality between unemployment rate and population growth during the reference period. The study thus recommended, amongst others, that the Nigeria government should make concerted efforts to check population growth rate.

Alimi et al. (2021) in the contribution to the controversial debate on whether high population is an asset or liability to an economy used the data on Nigerian economy to examine the link between the two phenomena for the period of 1981 to 2018. Employing both ARDL bound testing approach to cointegration and fully modified least square methods, the study found that population growth is an asset to the long-run economic growth of Nigeria. However, an adverse effect of population growth on economic growth was however reported in the short run. The short-run adverse effect was attributed to the high number of dependent population which initially characterizes a growing population, and which could later transit to demographic dividend when the young people become productive in their adulthood.

Dullah et al. (2011) opined that a large population could encourage greater specialization, and a large market increases returns to human capital and knowledge. So, the net result of the relationship between population increase and economic growth depends on which is stronger in its efficacy among the inducements to human capital and expansion of knowledge as compared with the diminishing returns to natural resources.

Kanayo et al. (2014) examined the effects of changes in fertility rate on household consumption demands in Nigeria, disaggregating the household expenditure portfolio into four categories such as expenditure on food, monetary transactions, goods and services, and non-cash expenditure. The study employed the Vector Error Correction technique and came out with the results that suggested that fertility dynamics in Nigeria could significantly affect the economy through the households' expenditure profiles. The study noted further that since the nation's population is both the producer and consumer of goods and services, changes in population dynamics can through its effects on the level of demand for consumption goods as well as its patterns, alter the overall and sectoral economic performance. This has important implications for the level and pattern of production and employment. Babatunde & Awopetu (2020) attempted examining the relationship between population growth and unemployment in Nigeria within the period of 1991 to 2016. Applying the method of Johansen Cointegration and Error correction model in the analysis, a positive relationship was found to exist between population growth and unemployment. This implies that a rise in population growth leads to an increase in unemployment rate. Babatunde & Awopetu (2020) noted that the effect of population size or growth on employment could be channelled through the impact on the level of economic activities in the country. As such, if economic activities increase with the pace of population growth, all things being equal, more employment will be generated for the increased population and unemployment will not be an issue. Population increase would only become a problem when there is no corresponding increased level of activities to absorb the population. Maku & Alimi (2018) however noted that Nigerian economic growth has been classified as jobless growth.

A review of literature shows a lack of consensus among the findings of scholars on whether a growing population is needed to spur the employment level or if it depresses it. Specifically, this study focuses on considering the impact of the different age groups bracket on employment level in Nigeria.

Methodology

Data description and model specification

This study made use of secondary data for the period of 1981 to 2019 which were sourced from the World Bank Group. The data used in the analysis were first examined to determine the status of their unit root with the use of Augmented Dicker Fuller (ADF) unit root test. Following Kanayo et al. (2014) and Babatunde & Awopetu (2020), the relationship between population change and changes in unemployment rate in Nigeria was examined by analysing the model specified below

$$UEMP = f(POP, DOM, FDI)$$

Where:

- UEMP is unemployment rate,
- POP represents population growth measured as age dependency ratio, (AGDEP), and working-age population ratio (WPOP).
- DOM represents domestic economic activities measured by Gross National Expenditure (GNE),
- FDI is Foreign Direct Investment, measuring the trade relationship with the outside world.

The relationship is further represented as:

$$UEMP = f(AGDEP, WPOP, DOM, FDI)$$

The econometric form of the model is given as:

$$UEMP = b_0 + b_1 AGDEP_{t-1} + b_2 WPOP_{t-1} + b_3 DOM_{t-1} + b_4 FDI_{t-1} + \varepsilon_t$$

Where:

- b_0, b_1, b_2, b_3, b_4 are the coefficients representing the effects of the respective variables on the unemployment rate,
- ε_t is the error term representing unexplained variability in the unemployment rate.

Estimation technique

The estimation technique which was adopted in the analysis of the relationship is the Autoregressive Distributed Lag (ARDL). The choice of the technique was informed by the order of integration of the variables of the analysis, which indicated series of mixed orders of zero and one.

The ARDL model for the study is as specified below:

$$\Delta UEMP_{t-i} = \lambda_0 + \sum_{i=1}^p \lambda_{1i} \Delta UEMP_{t-i} + \sum_{i=1}^p \lambda_{2i} \Delta AGDEP_{t-i} + \sum_{i=1}^p \lambda_{3i} \Delta WPOP_{t-i} + \sum_{i=1}^p \lambda_{4i} \Delta DOM_{t-i} + \sum_{i=1}^p \lambda_{5i} \Delta FDI_{t-i} + \lambda_{6i} \Delta UEMP_{t-i} + \lambda_{7i} \Delta AGDEP_{t-i} +$$

$$\lambda_{8i}\Delta WPOP_{t-i} + \lambda_{9i}\Delta IDOM_{t-i} + \lambda_{10i}\Delta FDI_{t-i} + \lambda_{11i}ECM_{t-i} + \mu_t$$

Where:

- the variables are as defined earlier,
- ECM is the error correction term,
- p is the dependent variable lag, while q is used for the lag of the independent variables,
- λ_0 is the constant term,
- $\lambda_{1i} - \lambda_{5i}$ are the short-run dynamic coefficients of the model,
- $\lambda_{6i} - \lambda_{10i}$ represent the coefficients of the long run equilibrium relationship,
- μ_t is the stochastic error term.

The null hypothesis in the equation is that $\lambda_{6i} = \lambda_{7i} = \lambda_{8i} = \lambda_{9i} = \lambda_{10i} = 0$.

On estimation of the model, it is expected that age dependency ratio exerts a positive effect on unemployment, while working-age population ratio is expected to have a negative effect.

Measurement of variables

The age dependency ratio is calculated as the ratio of dependants, which is made up of people younger than 15 years and those older than 64 years, to the working-age people. Data are presented as the proportion of dependents per 100 working-age population. A higher value means that more of resources that would have been saved for investment to increase employment level are consumed because employed people have to support more non-working people, whether young or old.

The working-age population ratio is the ratio of those whose age ranges between 15 and 64 years to the total population. A higher value of this implies increased employment as a result of increased investment, resulting from higher savings from employment of growing working-age population.

Foreign direct investment refers to direct investment equity flows in the reporting economy. It is a category of cross-border investment associated with a resident in one economy having control or a significant degree of influence on the management of an enterprise that is resident in another economy. Gross national expenditure, formerly known as domestic absorption, is the sum of household final consumption expenditure, general government final consumption expenditure, and gross capital formation.

Determining the long-run relationship of the variables is important. This was achieved by employing the technique of Autoregressive Distributed Lag (ARDL) bound test to cointegration. For the purpose of decision making in determining the long-run relationship status of the variables, the calculated F -statistics are compared with the values of both the upper and lower bounds of Narayan & Smyth (2005). If the calculated F -statistics exceed the upper critical bound value, we reject the null hypothesis of no long-run relationship. Contrariwise, if F -statistics fall below the lower bound value, the hypothesis of no long-run relationship is not rejected. However, if the F -statistics lie between the lower and upper bound values, the result is inconclusive.

Presentation and discussion of results

Table 1 presents the summary statistics of the data used in the analysis of the study. The average values of unemployment rate as depicted in the table are 11.5, with the maximum of 30 and minimum of 1.9. The mean value of the age dependency ratio of population is 89, with maximum and minimum values of 92.76 and 86.62 respectively. As for the working age population ratio, the mean value is 53, while the maximum and minimum values were respectively 53.7 and 52.

The standard deviation values of the variables, which indicate their disparity from the average points, suggest that they are relatively moderate. The values are 8.03, 2.02, 0.55, 1.23, and 8.4 for UNEMP, AGDEP, WPOP, FDI, and GNE respectively.

Furthermore, the values of the skewness show that all the variables with exemption of Working Age Population Ratio (WPOP) and Gross National Expenditure (GNE), are positively skewed. This indicates that the distributions are rightward skewed. The results further indicate that only two of the variables (FDI and GNE) are normally distributed, as the rest fail to comply with the benchmark of 3.0 for the Kurtosis statistic. Specifically, Unemployment (UNEMP), Age dependency ratio (AGDEP), and Working Age Population Ratio (WPOP) variables are platykurtic. This indicates that they have flat surface. Foreign Direct Investment (FDI) and Gross National Expenditure (GNE) are, however, shown to be leptokurtic, indicating that they are highly peaked.

Table 1. Descriptive statistic

	UNEMP	AGDEP	WPOP	FDI	GNE
Mean	11.47949	89.00692	53.00000	1.552821	91.72744
Median	11.90000	88.33000	53.20000	1.160000	92.12000
Maximum	30.00000	92.76000	53.70000	5.790000	106.7900
Minimum	1.900000	86.62000	52.00000	0.260000	67.92000
Std. Dev.	8.033030	2.027887	0.554883	1.233386	8.411089
Skewness	0.658737	0.577728	-0.511208	1.739041	-0.679637
Kurtosis	2.338691	1.904902	1.919145	6.072478	3.546401
Jarque-Bera	3.531238	4.118271	3.597068	34.99790	3.487541
Probability	0.171081	0.127564	0.165541	0.000000	0.174860
Sum	447.7000	3471.270	2067.000	60.56000	3577.370
Sum Sq. Dev.	2452.124	156.2684	11.70000	57.80719	2688.364
Observations	39	39	39	39	39

Source: Authors' computation, 2023.

As part of the preliminary analysis, the correlation matrix with the result displayed in Table 2, shows the degree and direction of association between pairs of the variables which

are employed to establish the links between population growth and unemployment in Nigeria. The degree of association between unemployment and the two population variables (AGDEP and WPOP) is shown to be strong. While an indirect association is observed between unemployment rate and population age dependency ratio, the association is shown to be direct with working age population ratio. The degree of association between unemployment and Gross National Expenditure, and with Foreign Direct Investment, is weak. While it shows a direct relationship with the former, it is indirect with the latter.

Table 2. Correlation Matrix

	UNEMP	AGDEP	WPOP	FDI	GNE
UNEMP	1	-0.563667985	0.566298043	-0.054326371	0.084529141
AGDEP	-0.563667985	1	-0.993262250	-0.037316889	-0.142875455
WPOP	0.566298043	-0.993262250	1	0.047641721	0.110999371
FDI	-0.054326371	-0.037316889	0.047641721	1	-0.35648118
GNE	0.084529141	-0.142875455	0.110999371	-0.356481186	1

Source: Authors' computation, 2023.

Table 3 shows the results of the unit root test of the variables. Using Augmented Dickey-Fuller (ADF) method, the result of the unit root test shows that four of the variables (AGDP, WKPOP, FDI, and GNE) are stationary at level, while the remaining two (UNEMP, and POP) are stationary at first differencing. The variables are hence shown to be of mixed order integration of order zero and one.

Table 3. The Results of ADF Unit Root Test

	t-Statistic	Prob.*	5% level	Order of Integration
UNEMP	-6.97	0.000	-2.94	I(1)
AGDP	-5.09	0.0015	-3.56	I(0)
WKPOP	-4.40	0.0014	-2.95	I(0)
FDI	-3.93	0.0044	-2.94	I(0)
GNE	-4.31	0.0016	-2.94	I(0)
POP	-3.69	0.0354	-3.54	I(1)

Source: Authors' computation, 2023.

With the nature of the variables, the appropriate technique of estimation is Autoregressive Distributed Lag (ARDL). The ARDL bounds testing method also has the potential for determining both the short-run and long-run effects of the explanatory variables on the explained variable. Also, it has the advantage of giving reasonable estimates when the sample size is small.

The analysis proceeded to find whether there exists a long run relationship among the variables of concern by using the Autoregressive Distributed Lag (ARDL) bound test. The technique

of Autoregressive Distributed Lag (ARDL) was employed to estimate both the short-run and long-run parameters.

The Akaike Information Criterion (AIC) was used to select the lag length at lag three, as shown on Table 4.

Table 4. Lag length selection

Lag	LogL	LR	FPE	AIC	SC	HQ
0	-329.4447	NA	80.71704	18.58026	18.80020	18.65703
1	-235.6308	156.3566	1.792436	14.75727	16.07687*	15.21784
2	-200.1630	49.26079*	1.091051	14.17572	16.59499	15.02011
3	-166.5304	37.36962	0.852024*	13.69613*	17.21506	14.92433*

Source: Authors' computation, 2023.

The hypothesis “There is no long-run relationship” was tested across different levels of significance with F -statistics at $k = 4$ against the critical bound values. The results of the ARDL bound test as presented in Table 5, show that the F -statistic values are higher than the critical values at the upper bound levels. This, the null hypothesis of no cointegration was rejected for the model at 5% and 10% levels. The result therefore implies that there is a long-run relationship between unemployment and population growth variables, coupled with other included variables within the period of the study.

Table 5. ARDL bounds test

Null Hypothesis: No long-run relationships exist

F -statistic = 3.599

Critical Value Bounds

Significance	I0 Bound	I1 Bound
10%	2.2	3.09
5%	2.56	3.49
2.5%	2.88	3.87
1%	3.29	4.37

Source: Authors' computation (2023).

Sequel to the establishment of the existence of a stable long-run relationship among the variables of concern, both the short-run and long-run parameters of the model were estimated, with the results presented in Tables 6 and 7. The empirical results, as presented in Table 6, show that population variables are significant determinants of unemployment rate in Nigeria during the period of the study. In the long run, both the age dependency ratio (AGDEP) and working age population ratio (WKPOP) negatively impacted unemployment rate. The economic implication

of the result is that as both age dependency ratio (AGDEP) and working age population ratio (WKPOP) increased, unemployment rate reduced. This could be attributable to the fact that, in the long run, an increasing working age population ratio is capable of reducing unemployment as a result of increased level of national saving, investment, and employment level. Contrariwise, a rapidly growing population, which can potentially increase the age dependency ratio is capable of reducing the unemployment rate by shrinking the rate of growth of the working age proportion of the population. The findings are in line with the result which was reported by Bloom and Canning (2001) and also Alimi et al. (2021). The study identified three different mechanisms through which demography can influence the economy: labour market effects, savings and capital accumulation effects, and human capital accumulation effects.

Table 6. Long-run estimation of ARDL

Variable	Coefficient	Standard Error	T-Statistic	Probability
C	11842.19	5279.623	2.242999	0.0353
AGDEP	-44.80763	18.98780	-2.359811	0.0276
WPOP	-147.6881	67.58312	-2.185281	0.0398
FDI	1.021384	1.646445	0.620357	0.5414
GNE	-0.147938	0.281284	-0.525939	0.6042

Source: Authors' computation, 2023.

EC = UNEMP - (-44.8076*AGDEP -147.6881*WPOP + 1.0214*FDI -0.1479
*GNE + 11842.1886)

The population variables were as well found to be significant determinants of changes in unemployment rate in the short run, as reported in Table 7. The result, as shown, suggest that both the age dependency (AGDEP) and the working-age population ratio (WPOP) exacted significant positive effect on unemployment rate in Nigeria in the short run. This could be explained in terms of increased youthful age dependency population ratio, resulting in reduction in investment levels as a consequence of devoting more resources to consumption rather than economic productive activities. Additionally, an increased working-age population ratio which could consequentially reduce the employment opportunities of the population. This result is in line with Graham and Beeler (2000), who pointed out that while rapid population growth may not be harmful for long term economic growth, it can however have disturbing effects on it in the short run. Furthermore, the error correction terms (ECT) with the value of -0.3483 and the probability of 0.000 are consistent with the conventionally requirement for the values. The short-run result suggests that the models converge in the long-run with the adjustment rate of about 35 percent. This further confirms the existence of a long-run relationship between population variables and unemployment growth rate in Nigeria. Also, the models are well-specified, and normally distributed, without the problem of serial correlation.

Table 7. ECM result of short-run estimation of ARDL

Variable	Coefficient	Standard Error	T-Statistic	Probability
D(UNEMP(-1))	-0.344023	0.136597	-2.518531	0.0196
D(UNEMP(-2))	-0.326874	0.153113	-2.134850	0.0442
D(AGDEP)	7.550732	3.329044	2.268138	0.0335
D(AGDEP(-1))	11.33712	3.973518	2.853169	0.0092
D(AGDEP(-2))	12.80718	3.372076	3.798011	0.0010
D(WPOP)	25.62986	8.610923	2.976436	0.0070
D(WPOP(-1))	50.90118	13.12388	3.878518	0.0008
D(WPOP(-2))	30.70655	11.31140	2.714654	0.0127
CointEq(-1)*	-0.348289	0.067654	-5.148055	0.0000

Source: Authors' computation, 2023.

Conclusion

This study was conducted to determine if it is Malthusian theory or Keynesian theory holds true in the population and unemployment relationship in Nigeria within the period of 1981 to 2019. The primary dataset that were employed in the study were unemployment rate, age dependency ratio, working-age population ratio, while other determinants of unemployment rate such as foreign direct investment (FDI) and gross national expenditure were also included. The datasets were sourced from the World Development Indicator database. The study employed the ARDL approach to cointegration to determine the long-run relationship of the variables. The results of the analysis confirm that a long-run relationship exists between population variables and unemployment growth rate in Nigeria during the period of the study. It shows that unemployment is significantly influenced by both population variables in the short and long run. Unemployment rate was negatively affected with changes in the population variables in the long run, thereby upholding the proposition of Keynesian theory of unemployment, which lends credence to the fact that population growth in the long run can improve the employment level through increased savings of higher working-population ratio. However, the effect was shown to be positive in the short run which supports the proposition of the Malthusian theory of population, where increased growth in population variables was proposed to be responsible for depressing economic opportunities. The study therefore concludes by asserting that the effect of population variable on unemployment is determined by the time horizon. With the potential to reap the benefits of today's population growth in the future, it is recommended that the government of Nigeria implement programmes focused on education and health to improve the skill acquisition of its population. Also, the potentialities in the growing population could be harnessed through increased aggregate demand when the government of Nigeria uses its fiscal policy to enhance people's income. Future studies could examine the aggregate demand potentiality of Nigeria's growing population.

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'Ilemosu' social stigma and desire for remarriage among female divorcees in Akinyele Local Government Area of Oyo State, Nigeria

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Abstract

Divorce is generally loathsome among the Yoruba people as it is morally reprehensible and socially stigmatized. Most women divorcees are derisively called '*dalemosu*', a term that represents failures in nuptial affairs and lack of capacity to manage marital crisis. To obliterate or counteract the social disapproval and stigmatization attached to divorce, many victims attempt to enter into another conjugal relationship, while others may never care about the disdain with the warped notion that marriage presents lots of injustices, especially for women. They instead prefer finding solace in single parenthood. Notions that "all men are the same" and "marriage is for the lucky ones" were identified as strong factors that made a number of divorcee participants to lose confidence in institution of marriage

institution. Leaning on the tripods of Socialist feminist, Psychoanalytic, and Social learning theories, this exploratory study inquired the shared understanding about the causes and social consequences of divorce on the female victims, the children, and the community. Qualitative data were gathered from women divorcees, community leaders, landlords, and landladies across Akinyele communities using referrals and snowballing techniques. Data collected were content-analyzed. Findings show that divorce is socially disapproved and highly discouraged among residents of the study area. Issues touching on finances, incompatibility, unfaithfulness, infertility, domestic violence, and lack of attention as common reasons for divorce. Thus, family members tend to treat female divorcees with contempt and, oftentimes, deprive them of certain social privileges. Having established that divorce produces damaging effects on society, the study recommends, among other things, the need for prospective spouses to seek the services of marriage counsellors. Mutual trust, tolerance, showing affection, as well as spending quality time with spouses in marriages, were also suggested as essential ingredients for matrimonial success.

Introduction

‘Ilemosu’ is a Yoruba concept coined to describe a woman’s return to reside in her biological lineage as a result of various situations after some years of marriage. Women found in this situation are labelled as ‘*dalemosu*’. In this circumstance, a woman may choose to abdicate her marital home for a variety of reasons. This is because marriages have their peculiar challenges, and to maintain a home requires that both the husband and the wife should work together with a common purpose. In an ideal marriage situation, there should be two people who are willing to care for the house regardless of any challenges that may emerge instead of the husband and wife deciding who will do it.

Among the Yoruba of Southwest Nigeria, marriage is not just about coming together of individual adult males and females, but the unity of two families that were never related by blood (Omeje, 2020). It is a social institution through which a man and a woman enter into some forms of contract for reciprocal obligations as husband and wife. Aroh (2021) noted that marriage has always been a partnership of survival with the preservation and improvement of the human species as its primary purpose. Obi (2016) posited that it is social contract ordained by nature for the continuation of human race. The essence of marriage according to Okoh (2014) is for procreation, care and education of the young members of society for the sake of continuity and survival of human race. It is important for marriage to be socially or legally recognized because it is through the arrangement that sexual and emotional relationships become legitimized in society. Njerem (2015) pointed out the significance of harmony, reciprocity, cohesion, fidelity, a high degree of stability, and unconditional love among couples. However, expectations in marriages are not always met as challenges arise from time to time. Hally and Hoffin (2015) identified conflict, violence, mistrust, constant bickering, neglect, and marital distress as symptoms of distressed marriage, which if not properly managed, lead to separation or divorce. Arowolo (2022) identified abuse, power tussle between couples, poor financial management, infidelity, infertility or

childlessness, hot temper, influence of mother in-law, influence of bad companies, influence of alcohol, improper use of language, impotence, poor communication between couples, early marriage, prolonged sickness, prolonged hardship, and maltreatment as other causes of divorce.

Hornby (2018) posited divorce as the ultimate end of toxic marriage. Mirror (2013) described divorce as the complete break up or dissolution of marriage through legal means, which according to Dohrenwend & Dohrenwend, 2004 and Norton and Glick, has been on the increase lately. Epstein (2012) despised divorce as he described it as a very special private hell, where financial capabilities are inconsequential. Just like what obtains among the Kanuris of northern Nigeria, failure in marriage attracts social stigma among Yoruba people. According to Cohen as cited by Omeje (2020), divorce is looked at as a moral failure. As Ifelunni and Asogwa (1995) earlier noted, divorcees among Igbos are not treated with respect in the public space as they are as well considered failures, which may, according to Holemsand and White (2015), lead to physical, social and mental illnesses. Other effects of divorce, according to Ezechi (2015) and Obi (2016) include low self-esteem, dissatisfaction with life, and financial insecurity.

In a study of selected communities on the causes of divorce in Rivers State, Nigeria, Asogwa (2003) noted that the most affected victims of divorce are children. The effects of divorce usually manifest on social and psychological well-being of the children as they grow up. He described the experiences of the children who were the victims of divorce as painful and bewildering. He argued that emotional pains and increase in mental disorder were attributed to high rate in divorce, especially when there was failure of the family to provide children with basic indispensable emotional satisfaction. Ikwuji (2002) in his study on 'the status of Information Service about Divorcees in Kogi State, Nigeria,' revealed that sexual excesses and other social misconducts by both parties were factors of divorce. He asserted further that frustrated divorced women often resorted to prostitution to make ends meet on one hand, and children raised out of wedlock, especially by divorcees, usually grow up to harass and molest the society on the other. Women who out of the need to honour womanhood, usually return to their family in order to forge a new life afresh, are not always given the emotional supports their situation demands. Among the Yoruba of southwest Nigeria, the practice in which divorced women return to their family house is labelled as '*ilemosu*,' while these women are often referred to as '*dalemosu*'. It is worthy of note that the social stigma attached to divorce and the changing face of family and matrimonial relations among the Yoruba extended usage of '*ilemosu*' as a post-nuptial concept beyond its original conceptualisation to cover the neo-nuptial concept of '*Iya'ndagbe*,' which describes a female divorcee who decided to live alone instead of returning to her parents' home.

With this age-long phenomenon and the branding of victims of divorce, adequate academic attention has not been focused on the factors leading to divorce and how the intricacies of marital dissolution can culminate into *Ilemosu*. Going by the painful experiences of female divorcee and the backlash of the phenomenon on the children, there is the need for academic interrogation of this phenomenon. This study, therefore, investigates the causes and consequences of divorce, which gave birth to the scathing concept of *dalemosu* among female divorcees in Akinyele Local Government area of Oyo State. While this study hopes to complement existing knowledge

on conjugal relations, it will as well serve as a guide and important avenue for narrating female victims' experiences of divorce. The study showcases a deeper and richer understanding of consequences of divorce, as well as the impacts of divorce on women, children, and the community. Specifically, the study seeks to provide answers to the following research questions: (i) What is the general knowledge of the causes of divorce which gave rise to the phenomenon of *dalemosu*? (ii) What factors influence desires for remarriage among female divorcees? (iii) What are the consequences of *Idalemosu* in the study area?

Brief review of literature

Marriage is a significant and natural human life process that has occurred in various formsthroughout all eras and cultures. It has made an effort to unite two people who have previously held disparate ideas and ideologies (Mutlu, 2018; Mohammadi, 2016). In addition, marriage is essential for human generational survival, child rearing, realizing the desire of parenthood, obtaining the highest level of friendship and closeness, labour division, cooperation, and helping one another in married life (Sadrolashrafi, 2011; Safiyari & Zare, 2015). Marriage should bring about happiness, but Jamshidi (2015) pointed out that the promises of marriage may be broken due to misunderstandings, poor partner choices, and changes in attitude. Keshavarz, Shariati, Ebadi, & Moghadam (2018) equally shared this sentiment.

Couples were not ready to get married, as seen by the rising divorce rate in the early years of marriage, especially among young people. Jebraeili, Zadeh & Heidari (2013) noted that in general, young people gave little or no consideration to issues of marital compatibility before rushing into matrimonial agreements. According to Saei, Ozgoli, Hejizadeh & Nasiri (2017), emotional demands, outside interference, cultural difficulties, and some internal psychological variables such as addiction, monetary woes, and betrayal all contributed to marital crises.

Concept of divorce

Divorce was defined as the judicial separation of the spouses as well as the total disruption and dissolution of marital relations by Gahler (2006) and Obiadi (2002). Divorce, in Hornby's opinion (2001), is the official dissolution of a marriage. Mirror (2003) describes it as the entire dissolution of a marriage via legal procedures. According to Mgbodile (2000), "broken home hangs a burden onto the children, while the breakers go about with a noose around their necks"; the children are the direct victims of divorce. He added that anyone considering divorce should be aware that they are holding the house and the children in their hands. Epstein (2002) stated that divorce is fraternity of those who have gone through emotionally ravaging phenomena that are equal to starvation.

According to Amadi, Unachukwu, and Igborgbo (2001), the hostile relationship between the wife and her husband's relatives, which made them oblivious to the early signs of divorce, including the husband's beating and mistreating the wife, his infidelity, the couple's lack of children, the preference for male children, the man's poverty and lack of emotional maturity, the difficulties associated with raising children and many other issues are the main causes of divorce.

When marriage is dissolved because of divorce, both parties shall be free from the obligations and bond of marriage. They could remarry elsewhere or live any type of life they may choose (Obiadi, 2000). Scholars like Ezechi (2005), Aroh (2001) and Ogbonnaya (2003), were of the opinion that divorce is the process of setting both parties free from the bond of marriage, which give them opportunity of new life. In addition, Omeje (2000) noted that divorce could conclusively be seen as a separation of the ties of marriage or a process of putting an end to the ties of marriage. Hornby (2001) defines divorce as the legal ending of marriage so that husband and wife are free to re-marry.

When a marriage is ended by divorce, both parties are freed from the ties that bind them. They had the freedom to remarry and live the kind of life they wanted (Obiadi, 2000). Academics like Ezechi (2005), Aroh (2001) and Ogbonnaya (2003) assert that divorce is the act of liberating both partners from the ties of the marriage, allowing them to begin again in a new partnership. According to Omeje (2000). Divorce can be clearly understood as a method of dissolving the bonds of marriage or a separation of them. Hornby (2001) defined divorce as the legal backup of a marriage that frees the husband and wife to get remarried. According to Anderson (2004), divorce is defined as one of the safety valves for inevitable tensions of marital life thereby ending the relationship or connection, which existed between two parties.

Divorce, causes and its effects

Okorie (2000), in his study of the Arochukwu and Umuahia people of southeastern Nigeria, discovered that childlessness is the worst fate an Igbo woman can have. Since many people who are childless or infertile are considered failed their only options are divorce or, at best, polygamy. Okorie's (2000) research confirms Norton and Glick's (1999) hypothesis that the recent decline in fertility rates may have contributed to the rise in divorce rates.

Divorce is a bad wind that blows nobody any good. In his study on 'the status of information service and divorce in Kogi State,' Ikwuji (2002) noticed that divorcees engaged in sexual excesses and other social vices, including prostitution, drinking, and gambling, to make ends meet due to frustration, neglect, and poverty. Divorce frequently results in the upbringing of children without recognizable father figures who later become troublemakers and a molestation of society. Divorce poses a hazard to people in stable marriages. For financial gain and company, exploited women seduce and seek out romantic relations with married men. Divorce thus creates enmity between individuals and groups and strains existing relationships. When children have been raised prior to divorce, they are destined to lack parental care. Divorce, therefore, results in unnecessary expenses on both sides, particularly when litigation and the payment of alimony are involved. Divorced couples also quickly lose their respect and recognition and become the subjects of rumour and jeers in the community.

The children are likely to develop into unpleasant members of society. They would lack the education, training, or other attributes that encourage peaceful coexistence; that is to say, divorce encourages indiscipline, hooliganism, and delinquent acts. Pope and Mueller (2002) found that

a broken family experiences financial hardship, at least while the child is living with a single parent. This indicates that the child will probably be obliged to forsake their schooling in favour of a career or marriage. In a study conducted on 'Sex role and psychological outcome for black and white women experiencing marital dissolution' in the London metropolitan city, which included 1000 divorcees, Brown (2000) found that the consequences of divorce could be either positive or negative. His findings of prevalence of physical and mental health problems among divorced population suggest an association between divorce and poor health including mental health. Thus, divorce becomes a turning point towards stress. On the positive side, he found that divorce could be a source of growth and wellbeing by providing a woman with an opportunity to realize her potentials for growth that might have been thwarted in the marriage, to expand her personal competence and esteem.

In a study on marital instability among the Kanuri of Northern Nigeria, Cohen (2000) found that divorce is looked at as a moral failure, and women divorcees are shown no regard by the society. In their study of demographic correlates of post-divorce adjustment among female divorcees, Ifeunni & Asogwa (1995) found that divorce is akin to moral failure, and divorced women were shown little or no respect. In another study conducted in four districts of New York, Bloom, Asher & White (1998) found that divorced individuals develop physical illnesses and have higher morbidity rate comparable to non-divorced married people. Epstein (2002) in his study on "Divorce: American Experience" found that the divorced and their children are a fraternity of the emotionally ravaged, and to go through a divorce is to go through 'a very special private hell' no matter how much money is available to cushion the fall.

Omeje (2000), in his study entitled 'Adjustment Strategies of Divorcees in some selected communities of Enugu State, found that adjustment problem itself is one of the difficulties or problems of divorce. In his study on 'Decreasing the Divorce Rate in Our Society,' conducted in Owerri, Imo State, Oko (2001) found that divorce weighs more on the affected children who lack complete parental care, and whose development are often affected psychologically. Mgbodile (2000), in a study of 'The Hangover of a broken home' found that 'as one cannot run away from his/her shadow, so one cannot avoid the hangover of a broken marriage.' 'Children, according to him, are the greatest victims of a battered marital relationship.' Weiss (1999), in his 'Emotional Impact of Marital separation,' found that effects of divorce include deviant behaviours such as juvenile delinquency, alcoholism, prostitution, and drug addiction. Other deviant acts attached include hooliganism, robbery, fighting, telling lies, stealing, dropping out of school, loose talk, and quick temper.

Kuppuswamy (2003), in a study of some selected communities in New Delhi, found that divorce, among other factors, is the cause of certain misbehaviours like chain-smoking, excessive alcoholic drinks, extreme wickedness, juvenile delinquency, prostitution, drug abuse, robbery, and loose life. Divorce causes timidity, emotional imbalance, telling lies, lack of parental care, constant fighting, suicide, waste of money if litigation is involved, and strain of relationship between in-laws. As found out by Asogwa (2003) in his study of the causes of high rate of divorce in some selected communities in Rivers State, a divorced home is a home characterized

by neglect, demoralization, and lack of parental care and such a home could be expected to breed delinquent and social misfits. The study also reaffirmed that those who suffer most during divorce are children for whom divorce could be a painful and bewildering emotional experience. Finally, the study shows that increase in mental disorder could be attributed to high rate of divorce where there is the failure of the family to provide individuals with basic indispensable emotional satisfaction.

Theoretical framework

The study is reinforced by the position of Socialist Feminist Theory, psychoanalytic theory, and social learning theory. The positions of the three theories were related to marriage, divorce, and the attendant effects of divorce in the society. The Socialist Feminists Theory (FMT) particularly identified capitalism as a main cause of exploitation in marriage. The proponents of the theory see women's unpaid job of housewives and mothers as means of exploitation of women. It is believed that the womenfolk are placed at economically disadvantaged positions that make them weak, docile, and vulnerable to the domination of men in marriage. The vantage economic positions that men occupy make them to dominate and dictate the tunes of marriage to the extent that the burden of divorce is less felt by men than women. In most cases, it is women that the society blame for divorce. Also, it is also easier for men to quickly enter into another marital union than women.

The Social Learning Theory (SLT), otherwise known as behavioural family therapy, was propounded by Albert Bandura. The theory assumes that when two individuals interact, they become part of each other's environment; and when marriages fail, the two individuals in interaction are liable to be blame since each can by his or her respective neglect of his or her roles contribute immensely to generating the emerging crisis. This implies that the traditional African practices as well as legal proceeding where a spouse is declared guilty and the other exonerated during disputes (or what Nwoye 1991 referred to as mono-causality) is not sustainable. The proponents of social learning theory agreed that most behaviors of a child represent carbon copies of the manifestations of what exists within society. The model which the child observes in his environment, plays important roles in social learning. The model's behavior may serve to elicit some responses in an observer that are already in his repertoire. This occurs when the behavior is socially prescribed or labelled as deviant behavior (Chauhan, 1990).

In Freud's psychoanalytical model, human psyche consists of three different elements: the id, the ego, and the superego. The id is the aspect of personality that is driven by internal and basic drives and needs, such as hunger, thirst, and the drive for sex, or libido. The id acts in accordance with the pleasure principle. Due to the instinctual quality of the id, it is impulsive and unaware of the implications of actions. The superego is driven by the morality principle. It enforces the morality of social thought and action on an intra-psychic level. It employs morality, judging wrong and right and using guilt to discourage socially unacceptable behaviour. The ego is driven by the reality principle. The ego seeks to balance the conflicting aims of the id and superego, by trying to satisfy the id's drives in ways that are compatible with reality. The ego describes how

we view ourselves: it is what we refer to as 'I' (Freud's word is the German *ich*, which simply means 'I'). Relating this to the issue of marriage and divorce, the Psychoanalytic theory explains the negative impacts of divorce which lead to the breeding of undisciplined children whose actions and behaviours affect the system of society and the community at large.

Methodology and data

This study adopted exploratory research method to investigate the general understanding of the causes of the marital concepts of *dalemosu* among female divorcees in Akinyele Local Government Area of Oyo State and the factors influencing their decisions to remarry after divorce as commonly practised by the Yoruba of southwestern Nigeria. The adoption of exploratory method paves way for digging deeper into the subject matter and makes new discoveries possible. The population of this study consisted of divorced women; willing and unwilling to remarry, community leaders, and landlords/landladies in Akinyele Local Government Areas of Oyo State. Purposive sampling was adopted for the selection of Key Informants, while participants for the In-depth Interviews were identified through referrals. Twenty (20) In-depth interviews (IDIs) and ten (10) Key Informant Interviews (KIIs) were conducted to gather data from female divorcees, community leaders, and landlords/landladies in twenty conveniently selected communities located in the study area. Interviews were conducted using ten (10) to twelve (12) question items interview schedules. Each interview session lasted between twenty-five (25) and thirty (30) minutes, while data gathered were content analysed using thematic approach.

Data presentation

Reasons for divorce among spouses

Divorce, which has given birth to the concept of *ilemosu* among Yoruba, is sometimes inevitable for reasons of serious disagreements, which may be peaceful or violent, depending on the pressures they mount on human endurance. The realities of everyday marital experience have shaped participants' opinion on the reasons for divorce among spouses. Many of them, for instance, listed issues like impatience, low financial capacity, infidelity, deceit, unsatisfactory conducts, egoistic tendencies, breach of trust, maltreatment, lack of care, and domestic violence as part of the factors leading to divorce between couples. As narrated by one of the participants:

divorce is predicated on a number of factors. For some, it is due to impatience; some people are not satisfied with the marriage; there are issues of infidelity and mutual distrust; there are also allegations of maltreatment and lack of spousal care; issues of barrenness, male impotence and domestic violence also come to play alongside many other reasons. However, barrenness (a situation where the woman is unable to conceive) or impotence is very constant among the factors for divorce after few years of marriage (KII/Male/Landlord and Opinion Leader/Moniya, Akinyele LGA/August 2022).

Underscoring the role of finances in marital relationship, another participant recalled:

I had to divorce my first husband due to financial problem. My then husband couldn't finance his home, and it is not every woman that can cope with such a man, especially when couples did not understand each other before going into relationship. I learnt from others who have also experienced divorce that domestic violence or abusive relationships is not strange to such toxic relationship, hence the breakdown of relationship (IDI/Female Divorcee/Ojoo Community, Akinyele LGA/August 2022).

Another participant emphasised that:

money is very important in any relationship. Many married and those not yet married often complain of money. When couples cannot afford the basic things of life that would make the marriage flourish or even the basic necessities of life, this leads to regular quarrels, fighting, and unnecessary arguments. These issues specifically led to my divorce because I can't stand a man that is not capable of discharging his responsibilities (IDI/Female Divorcee/Moniya, Akinyele LGA/August 2022).

In the opinion of another participant:

the reason why people divorce after marriage is due to financial problem because not every woman can stay where she is not being taken care of. I am a living witness of this scenario. It is a bitter experience and is not something that is good at all. My ex-husband started beating me barely less than one year into our marriage. Aside from this, he abused me in various modes, and I just have to leave because if I didn't, he might end my life one day, and I think it is better to divorce than to die prematurely in marriage (IDI/Female Divorcee/Akingbile-Oluana Community, Akinyele LGA/August 2022).

Still emphasising the import of adequate finances in marriage, another participant notes that:

in most cases, money is a crucial issue in marriage; if there is no money, it becomes a problem. If one of the spouses has the money and the other does not, it is another type of problem. However, if the woman has the money and the husband does not, it is a serious problem. Another important aspect of money is how it is spent. If a couple cannot talk openly and honestly about money, it can lead to a lot of disaffection between them. It may even open the window for other issues to set in and lead to a separation or divorce (KII/Female landlady/Tose Community, Akinyele LGA/August 2022).

In another dimension, a participant stressed that:

I will stick to lack of patience as cause of divorce. Each of the couples do not want to adapt to the other person's lifestyle. Unfortunately, that is what marriage is all about. One has to be able to adapt to the man's lifestyle or the woman's lifestyle because they both have different backgrounds. In addition, once one decides to come together, one should appreciate the backgrounds and tolerate him or her. Then, one must blend the two together to build a new foundation to live together (IDI/Female Divorcee/Idi-Ose, Akinyele LGA/August 2022).

Another participant notes that:

abuse and violence lead to divorce. I will never advise a woman to stay in an abusive relationship because it can affect the person socially and psychologically. Several women in such situation have either suffered terminal illness and eventual death due to their failure to take appropriate steps. The failure is always a product of fear of what the community will say about the decision to run away. In my case, I don't care whether I'm labelled an 'ilemosu' or 'dalemosu'. What matters to me is my life and my happiness (IDI/Female Divorcee/Awumoro Community, Akinyele LGA/August 2022).

Lending credence to the roles of abuse and domestic violence in marital disorganisation, another participant submitted that:

my former husband became toxic and abusive at a point, and this affected our relationship. It even degenerated to unnecessary arguments, and later to domestic violence. I later realised it is better to be alive than struggling to tolerate a man who was ready to kill if dared. I had to file for divorce. At the end, the court shared some of his property to me because I had three children for him, and I am happy with that because it is not easy to take care of children alone (IDI/Female Divorcee/Olorisaoko community, Akinyele LGA/August 2022).

Another participant adds that:

sometimes, it is good to divorce than to stay because incompatible marriage will affect the children and their future, mostly their education and marriage life. I left my husband when I realised that our marriage was full of deceit. I did not know that he had two wives before. I thought that I was the only the person he married. Moreover, I came from a Christian home; it will be a slap on my family to remain in a deceitful marriage. I am happy I got to know this just six months of my marriage to him and I decided not to have children for him. This made divorce very easy for me (IDI/Female Divorcee/Alfonso area, Akinyele LGA/August 2022).

Another participant reported a blend of unpreparedness, inexperience, and marital neglect as reasons for divorce. As she recounted:

my ex-husband courted me for just six months when he got me impregnated, we had two kids from the relationship. As time proceeded, he changed completely from whom he used to be at the period of dating. He started womanising and began sleeping with any woman he came across. He stopped catering for me and the children, in addition to his cheating exploits. He would not hesitate to beat a hell out of me if I reported him to my family. I later decided to depart along with my children when I couldn't bear the 'shit' anymore (IDI/Female Divorcee/Orogun, Akinyele LG/August 2022).

Regarding factors responsible for the phenomenon of dalemosu among female divorcees, findings of the study identified the practice as a response mechanism within the socio-cultural system of the Yoruba. It describes a situation where family bond and role system of the group dictate members' obligation and support in situations of marital crises that may be experienced

by any of them. One of the participants, in her description of the concepts of divorce and *dalemosu* opined that:

divorce signals an end to the existing conjugal union between a male and female. Thus, if a woman can stay alone and perhaps with her children after the dissolution of the union, she may not yet be said to have *dalemosu* until she opts to return to her parents (IDI/Female Divorcee/Alfonso area, Ojoo, Akinyele LGA/August 2022).

One of the key informants also clarified that the concept 'dalemosu' is not applicable to all female divorcees. It only describes a situation in which a female finds it difficult to manage the crises of divorce alone, and as a result returned to her parents' house. Even though *ilemosu* is generally an unpleasant scenario in Yorubaland, it serves to provide emotional support for female victims of divorce against post-divorce trauma (KII/Male/Landlord and Opinion Leader/Ojoo, Akinyele LGA/August 2022). The foregoing emphasises the need to provide emotional support to female victims of divorcee as factors underlying the emergence of *dalemosu* in the study area.

Divorce and remarriage

Data supplied by the participants actually justifies the position of sociologists that man, being a social animal, cannot do without companionship or keeping company with one another, especially when it comes to persons of opposite sex. The necessity of such companionship manifested in the fact that man interacts and share thoughts together. Virtually all the participants affirmed the necessity of remarrying except one who differed in her opinion. One of the divorcees who subscribed to the idea of remarriage explained that:

I don't think there is any person in this world who doesn't want to be happy; I also deserve to be happy. I believe I can still find happiness if I marry again. Remarrying with caution and prayer, I think, is the way to go for me (IDI/Female Divorcee/Aroro-Makinde area, Akinyele LGA/August 2022).

Another participant revealed that:

my work demands full concentration, so I am not thinking of remarrying for now. Moreover, my son supports me and Allah always opens the door of sustenance for me. Insha Allah I have never suffered financially. The ex-husband also still finances children's education (IDI/Female Divorcee/Ojoo community, Akinyele LGA/August 2022).

Results also indicate that re-entry into another marital union may either produce different or similar outcomes depending on the socio-demographic context shaping the new arrangement. The intricacy stems from the ability and willingness of either party to cope with the of children involved from both sides as well as the roles of each individuals involved. As one of the participants in the KII explained:

it is important for a female divorcee to open herself for another relationship given the fact that divorce favours men more than women. The interests of men are always covered when it comes to marital relations. So, if a man is free to take another wife, what prevents a woman from choosing another husband? For me, I will always advise that women should enjoy their freedom under the law as men do (IDI/Female Divorcee/Ojoo, Akinyele LGA/August 2022).

Another participant was of the view that:

except there is still room for reconciliation between a divorced wife and her erstwhile husband, women should remarry when faced with divorce. One important reason for me to share this opinion borders on the limited number of reproductive years available for women. Younger women who still desire reproduction should not waste their time waiting on nothing

A participant however warned that marriage to me is like a black or dark market; you enter into it without understanding the complexities and intrigues. What, then, tells us that the experience of the second marriage would be different from the first? This is why women who find themselves in this situation should tread carefully when making fresh choices. It requires prayers and some elements of luck. One should learn to expect everything, positive or negative (IDI/Female Divorcee/Orogun, Akinyele LGA/August 2022).

This was corroborated by a Key Informant. In his opinion:

there is possibility of remarrying among women divorcee for social security. Remarriage is a good thing, for women divorcee so as to retain their dignity in society; otherwise, people will see them as prostitutes or an arrogant person who does not want to stay with a single man. A separated or divorced woman who could not settle rifts with her husband has no other option than to remarry; if not, she will definitely be branded as prostitute. Worse for her is to attempt returning to her parent because she will be tagged *dalemosu* (KII/Male/Community Leader/Akinyele LGA/August 2022).

Another participant was of the view that:

it is advisable for divorced women to remarry and not staying single. Single motherhood is not socially approved in this part of the world. Whosoever does that, especially those with children from that broken relationship, may find it extremely difficult to cope. The people of the community will not respect such woman and may see her as unserious person (IDI/Female Divorcee/Idi Ose area, Akinyele LGA/August 2022).

Confirming the necessity of remarriage for divorcees' socio-psychological wellness, another participant opined that:

we are naturally born to interact with others in companionship. Since nobody falls from heaven and God Who created us knows our purpose on earth. However, we need friends, family, a lover and equally a spouse to relate with to improve our mental health (IDI/Female Divorcee/Orogun, Akinyele LGA/August 2022).

Another participant affirmed the necessity of remarriage. According to her:

average divorcees will like to remarry because it is difficult to live alone without emotional supports. A woman needs to have someone to share problem with. Where the case can be overlooked is when the divorced woman has got more than two children. A divorced woman with only one or two children are thought of as operating below societal demographic expectation and, as a result, seen as unserious for refusing to take necessary risks of divorce and remarriage. This is because of the shared general belief in Africa's socio-demographic orientation that there is just a thin line between barren person and someone having only one child. Also, a divorcee who decided to remain single in her parent's home is thus labelled as *dalemosu* (IDI/Female Divorcee/Akingbile community, Akinyele LGA/August 2022).

A participant slightly differs in opinion on the need for remarriage as a post-divorce step. As she submits:

women divorcee should stay alone and be independent so as to free them from male dominance and humiliation; they should engage in work to sustain their living rather than depending on others. Being alone doesn't mean being isolated and never seeing anyone. It just means being without husband. I personally noticed that it is always difficult for women to operate freely under husband; family disturbance is also part of the challenges of staying under a husband (IDI/Female Divorcee/Ojoo Barrack area, Akinyele LGA/August 2022).

Implications of divorce on children

Family is the first institution to impact on various aspects of children's lives, enabling them to acquire the necessary behavioural skills in society. Divorce greatly influences the life and welfare of children and how they behave in the society; it sometimes affects them mentally, physically, socially, and emotionally. According to a participant:

the implications of divorce on children are poor academic performance, increase health problems, loss of interest in marriage, and it affect their emotional sensitivity. The summary of this is that I have unpalatable experience of divorce. It also affects my children; it gets them distracted, confused, and most of the time they lose concentration in class, this interrupts their daily focus and distracts their school work (IDI/Female Divorcee/Sawmill area, Moniya, Akinyele LGA/August 2022).

Submissions from another participant show that:

the implications of divorce on children are not that palatable, especially when the divorced woman is dependent or not gainfully employed. The difficulties from divorce do not only affect the spouse alone but also include the children. It affects their academic performance and creates health challenges in them. Many times, children have lost interest in marriage as a result of their experience while growing up. The sad experiences have wreaked havoc on many children's emotional sensitivity (IDI/Female Divorcee/Asanmajana, Moniya, Akinyele LGA/August 2022).

Further responses specifically underscore the negative implications of divorce on the children's educational performances and moral uprightness among other consequences. According to a participant:

poor academic performance and increased health problems are commonly experienced by the children whose parents have legally procured divorce. Of greater importance is the fatherly love that will be removed by the absence of the father from the union, especially where the mother has been allowed to take custody of the children (IDI/Female Divorcee/Arikewuyo, Moniya, Akinyele LGA/August 2022).

Another participant was of the view that: "a husband provides his wife with a good family, a home without a father will therefore affect children's upbringing and the way they behave in the society" (IDI/Female Divorcee/Arulogun, Akinyele LGA/August 2022).

Effects of divorce on divorcees and children

Divorce has traumatic effects on wives and children. Existing facts affirmed the negative effect of divorce especially on the women and children. It also affects them mentally and emotionally because there are lots of trauma attached to being physical and emotionally separated from one's spouse. While corroborating this, a participant submitted that, "there are several negative implications from divorce on the women involved." Participants described their life after divorce as traumatic. In the words of a thirty-six-year-old divorcee:

after my divorce, the environment in my mother's house was unexpected and unbelievable to me because I saw a change in my siblings' attitude towards me. They did not accuse me directly but their behaviour totally changed. Sometimes they made me to understand that I am a stranger in the house. So, I should not involve in family decisions and matters. Since my two children were very small and I had to stay only with my mother because my father was not alive (IDI/Female Divorcee/Onilu Community, Moniya, Akinyele LGA/August 2022).

Directing attention to the socio-psychological consequences of divorce, another participant opined that:

resorting to divorced is not easy; living alone is equally not easy. Married or not married, being alone is emotionally straining and socially uncomfortable. The ability to relate with others and share your problems with them sometimes brings relief. One stands a lot to benefit from marriage as long as the challenges are not life-threatening (IDI/Female Divorcee/Shasha-Alfonso, Akinyele LGA/August 2022).

Another participant expressed that:

my elder brother blamed me for seeking divorce, while my siblings refused to understand the psychological pressure I was passing through. However, I tolerated all is because of my children. Some of my relatives said that I was responsible for the dissolution of my marriage; they also blamed me for

my inability to endure the challenges of my marriage (IDI/Female Divorcee/Kajorepo Community, Akinyele LGA/August 2022).

Post-divorce experience varies depending on reasons for divorce and the willingness of the family members to lend support. Narrating her own life experience, a participant notes that:

after my three or four months into my divorce, I began to notice some changes in their attitudes, especially from my elder brother and sister-in-law. They did not accuse me of anything directly but through non-verbal dispositions. Through body language, they showed me why I should have endured to sustain my marriage regardless of whatever challenges I faced. I found it difficult to adjust, and I was forced to isolate myself from them in every way possible to avoid further humiliations (IDI/Female Divorcee/Akinyele Community/August 2022).

In a different scenario, another participant narrated that:

my family members helped and supported me. They accepted me and made my life easier by not remind me of the divorce. However, I have been busy working in my shop to provide for my needs and improve my standard of living. The environment at place of work was not that much challenging for me. I have to keep my divorce status to myself by pretending to wear an engagement ring to hide my status (IDI/Female Divorcee /Ojoo, Akinyele LGA/August 2022).

Another participant revealed thus:

I divorced without my parents' consent. They broke off all the relations with me. Therefore, I could not seek help from them and I got respites from my children's comforting words. Moreover, they tell me not worry and they are my backbone. I and my children are working hard to make life better, and we do not feel offended with what their father has done to us. Their kind words encouraged me and helped me to overcome the difficulties of the post-divorce life (IDI/Female Divorcee/Akinyele town, Akinyele LGA/August 2022).

A participant equally noted that:

divorce come with many challenges, and to be frank, divorced women are not always happy with their status. Being alone equally affects them mentally and emotionally without having people to share problems with. However, there are things one can only share with one's husband but not possible with separation through divorce. Whenever I see women with their husbands, I feel jealous and envious of them; I don't feel happy about my status, I don't know about others (IDI/Female Divorcee/Oke Orogun, Akinyele LGA/August 2022).

Insight into the effects of divorce was presented by another participant thus:

I can't say about others as for me, sometimes when I'm with people, I feel happy especially with my children but when I'm alone I feel sad because that time I need my husband. It is possible that some

women are happy because of the status of their former marriages and for staying alone but in my own case, I'm not happy at all (IDI/Female/Divorcee/Ajibde Community, Akinyele LGA/August 2022).

Further, another participant in her submission revealed thus:

we are not happy being divorced because marriage is sweet if you are with the right person and can also impact children we have together. Again, if there is opportunity of getting married to a responsible person again, I will get married (IDI/Female/Divorcee/Kajorepo Community, Ojoo Express Road, Akinyele LGA/August 2022).

In another development, a participant revealed that:

divorced women are not always happy with that status. In my own case, my unhappiness manifests when I feel lonely and need someone to interact with sexually. If not for that, I feel reasonably okay with a stable business and beautiful children God has blessed me with (IDI/Female/Divorcee/Aroro-Markinde, Akinyele LGA/August 2022).

Some participants shared the opinion on the role of husband in the life of a woman. According to one of them, "a good husband is important to his wife. He is her help mate, a companion, her lover, her supporters, her friend, and more importantly, working together to build relationship and also produce offspring" (IDI/Female/Divorcee/Ijaye community, Akinyele LGA/August 2022). In addition, another participant opined that "it depends on the husband and the wife because each marriage is built by the couple. I do not need my husband for financial support, I need my husband because I love him and he loves me; other people might have different reasons" (IDI/Female/Divorcee/Iroko Community, Akinyele LGA/August 2022). Another participant was of the view that:

my husband is my companion who helped in paying expenses and also engaged in conversation, helped around the house with chores, and be an equal partner. However, my husband changed totally over time and the caring wasn't there anymore. I even felt unwanted by him because of the influence of friends. Cheating is something I hate, and he indulged in it, I had to leave that marriage, but it has not been easy because it affects me mentally and emotionally. Sometimes, I look at myself as a failure (IDI/divorce woman/Akinyele LG/August 2022).

Implications of divorce for the community

A general observation is that the divorcees live in communities, but female divorcees are not usually respected by Yoruba people. They are rather seen as failures and people who could not manage family challenges either as a result of greed or impatience; and, therefore, should not be tolerated in certain spheres of life. Narrating her own version of experience as a Community Leader, a participant revealed that "house owners or landlords are not willing to rent out their houses to female divorcees because many of them have different acquaintances who are suspected to be capable of implicating the landlord" (KII/Female/Community Leader/Ijaye Orile, Akinyele

LGA/August 2022). Another participant explained that “most landlords are unwilling to give divorced women houses for rent because of the difficulty in controlling them. If they instruct them to tidy up the house, women always found reasons to excuse themselves without complying with the directives” (KII/ Landlord/Community Leader/ IITA, Idi-Ose, Akinyele LGA/August 2022).

In addition, another participant noted that “many divorcees are not always submissive; they can be promiscuous while some tend to live lavish lifestyle and entertain night visitors which sometimes bring harm to the residence” (KII/community landlord/Akinyele LG/August 2022). Another participant noted that:

It is mainly to avoid disputed and unnecessary argument and lack of endurance. People see them as persons who cannot endure and lack understanding, while at the same time used to extravagant lifestyle before marriage. A person that is used to all that will find it hard to respect their spouse if he cannot spend lavishly on her (KII/community landlord/Akinyele LG/August2022).

Still on reasons why divorcees usually have difficulty in securing apartment from the house owners, a participant noted that “they (Landlord) usually view the divorcees as irresponsible type that may not want to comply with regulations guiding the house. Aside from this, the practice of bringing different people to the house rented for her is dangerous for her and other occupants” (KII/Community Landlord/Aba Apata, Akinyele LGA/August 2022). Another participant revealed further that:

it is possible for Landlord to take sexual advantage of the divorcees if the woman is promiscuous. Some women are easily penetrated due to the harrowing experiences of divorce they are passing through. But where a woman is decent and responsible, it is always difficult for anyone to take advantage of her (KII/Community Leader/Sagbe Community, Akinyele LGA/August 2022).

Discussion of findings

Participants agreed that the causes of divorce vary based on the situation on the peculiarities of each marriage. As the study discovered, some divorcees were open to getting married again, but a significant portion of them could not. It also demonstrates that staying alone does not encourage emotional stability. This underscores the relevance of men’s companionship and emotional support. However, while the participants all agreed that women could live alone, staying single was admitted to be very difficult and unadvisable for any divorcee’s socio-psychological existence. Almost all the participants also agreed that children of divorced parents tend to perform worse academically; they suffer from series of health issues, lose interest in marriage, and lack emotional intelligence. As the study found, the children being victims of divorce may be frustrated to forsake their schooling in favour of a career or marriage. These findings corroborate Epstein’s (2002) position that divorce weighs more on the children than their warring parents. Achebe (2000) points out that parents who raised a child have nothing to say to him/her about the constraints, roles and more expectations of the society in which he/she is to live. The Id, Ego, and Superego constitutes the three personality structures that make up an individual, while

a child passes through four unique stages of psychosexual development, including oral, anal, phallic, and genital. According to Freud, a person's experiences at each stage leave some distinctive impressions and imprints that affect what his or her attitude to marriage and divorce would be in the future. Apart from providing justifications for divorce, the study underscores the imperatives of giving sufficient considerations to the survival and socio-psychological well-being of the individuals engaged in marital relationships vis-à-vis the survival of the union itself. While the latter determines the health of human society in terms of its moral efficacy, the former determines the health of the actors in relationship. As the Socialist Feminist ideology suggests, due consideration should be given to factors necessitating marital dissolution as a worthwhile alternative rather than mounting a blanket moral condemnation against divorce.

The study findings established a connection between financial inadequacy and the incidences of divorce on the one hand, and the interaction between gender and access to accommodation on the other. This seems to be in tandem with the assumption of Socialist Feminists perspective, where females are presumed to occupy a disadvantaged position relative to males in terms of access to economic power and the propensity for being dominated, exploited, despised, or discriminated against. Divorce has also been discovered to have negative impacts on divorcees' social lives. This aligns with Asogwa's (2003) position that a divorced household is one that exhibits neglect, dejection, and a lack of potential attention. He believed that such a home would likely produce social misfits and criminals.

This study, in essence, shows that those who suffer the most in cases of divorce are the children, for whom it may be an emotionally traumatic and upsetting experience – a situation that may make the children vulnerable to antisocial behaviour. The rising prevalence of divorce, which occurs when families fail to give people the essential emotional fulfilment they need, may be implicated for the rise in mental disorders.

Divorce was noticed to have produced impacts on both partners in the study area, and as a result, produced noticeable impacts on community progress. In line with Ikwuji's (2002) observation, divorced women seek to entice guys who are happily and truly cohabitating. Divorce results in unnecessary costs for both parties, particularly when litigation and alimony payments are involved. Divorced spouses quickly lose their respect and recognition, and they become the subject of rumours and jeers in the neighbourhood. Divorce disrupts relationships where children have been raised in previous marriages and breeds animosity between individuals and social groups.

Conclusion

This study examined divorce in the context of *ilemosu* stigma with specific focus on its social consequences of divorce for the victims, and community as well as its imperative for remarriage. The outcome of this study validates the postulates of psychoanalytic theory. The causes and effects of divorce are many, as it includes domestic violence, infidelity, lack of adequate care, self-centredness, incompatibility, bad behaviour, infertility/impotence, and so on. *Ilemosu* was discovered to be the product of the Yoruba socio-cultural arrangement which arose in response to the emotional

needs of female divorcees. One of the effects of divorce is the emergence of the phenomenon of *ilemosu* which, though detested across the nooks and crannies of Yorubaland, still functions to provide emotional supports and succour to female divorcees. According to Achebe (2000):

the problem of inadequate superego formation presents a disastrous crisis in situation where the affected individual possesses a non-viable ego structure. This is also applicable where parental and home training is silent on matters of balance in social etiquette and moral values. It also applies to parental figures under whom the individual was reared had nothing to tell the child concerning the restraints, the disciplines, and the moral expectations of the society under which he is to live, work and have his being. It is therefore a fact that uncommitted and irresponsible man or woman cannot raise or maintain stable home without making recourse to divorce. Spouses must, therefore, be committed to loving each other and their children, helping and developing them in a right manner to become the best in society at large.

Recommendations

- Marriage counsellors should be encouraged to conduct further studies in this area in order to find a lasting solution to divorce, where zero tolerance would be developed against divorce.
- Couples should be admonished to solve marital challenges and refrain from seeing divorce as a solution. If all resolutions failed and dissolution becomes necessary, couples should jointly take responsibilities for their children's welfare.
- Counsellors should enlighten the public (students, parents, divorcees, and society) on their roles in family building and conjugal survival.
- Young people should be encouraged to attain higher education before entering into marriage. This can be done through counselling, workshops, seminars, print, electronic, and social media, etc.
- Counselling efforts should be focused on divorcees by addressing the issues leading to divorce and its socio-psychological and economic consequences.
- Finally, a synergy should be formed between counsellors, NGOs, and religious leaders to enable relevant nuptial education be appropriately disseminated to the grassroots.

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Inconclusive elections in Nigeria and its security implications: Righting the wrongs in 2023

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Democracy, election, inconclusive election, electoral violence, politics

Abstract

The string of disputed elections in Nigeria has posed a significant threat to the country's efforts to consolidate democracy. In representative democracies, inconclusive elections are a quite frequent occurrence. But in Nigeria, they are sometimes stage-managed and permitted to occur in order to further the deliberate goals of power centers. Consequently, the causes and solutions of Nigeria's recent political growth are critically examined in this paper. This paper uses a mixed method research design that includes both quantitative and qualitative data collection and descriptive analysis. It has been determined through a thorough review of the literature that electoral violence and malpractice together are to blame for the nation's rising voter turnout and disputed electoral legitimacy. According to the findings, Nigeria must immediately implement comprehensive electoral reform in order to establish a new electoral system built on digital election technology. This will produce leaders who lack originality and who are worthy of purposeful leadership and good governance, as self-serving leaders are disastrous for any country.

Introduction

Global realities and a very regular democratic practice are inconclusive elections. According to Abah & Nwokwu (2016), they are widespread occurrences in both developed and developing nations. Elections typically last for months in both developed and developing democracies, such as Spain, Italy, the Netherlands, Kenya, and Malawi, to make sure the results align with their own constitutions. According to Bosco and Verney (2016), the ten-month-long “repeated” 2015–16 Spanish elections caused “the breakdown of established patterns of political representation” in the nation. Inconclusive elections became the new standard in Spain due to a similar tendency that began with the 2019 electoral impasse (Henley, 2019; Rainsford, 2016). Furthermore, when the President's proposed “neutral” government encountered strong resistance, Italy's 2018 inconclusive election resulted in a caretaker administration (Jones and Balmer, 2018;

Chiappa, 2018). “Elections in September (2019) failed to resolve the deadlock left by equally inconclusive polls in April” of same year, according to an article in the Israeli press. Following progressively challenging discussions, new records were set in 2017 and 2018 by the Netherlands with 208 days and Sweden with more than four months (Henley, 2019). Belgium had 541 days to negotiate a coalition government before the 2010 elections. When the governing coalition fell apart in 2018, Belgians showed what happens to politics when there are no politicians, going 589 days without a government and running the show in a caretaker capacity (Birnbbaum, 2019). They put an end to the longest period of time that was thought to have passed in a developed nation without an elected administration. In Europe and beyond, a lot of elections now result in polls that are difficult to conclude (Henley, 2019). Because of this, victory is now meaningless “unless the party can form a government” (Rainsford, 2016). Nigeria’s political process has been plagued by inconclusive elections like a hydra-monster. This is because of a variety of variables that contribute to the word “inconclusive election’s etymology. The phrase “inconclusive election” was not a well-liked catchphrase in Nigeria before the 2015 general election. During the tenure of Professor Yakubu, the current Chairman of the Independent National Electoral Commission National (INEC), the term “inconclusive election” gained popularity. It is important to comprehend what an election is at this stage. A formal decision-making process called an election is used by the public to select a candidate for public office. According to Saminu (2016), it has also been called a celebration of democracy, in which voters choose representatives who would assume power in a predetermined amount of time.

Pre-election, election, and post-election activities are mandated by the electoral cycle, which may be explained by the fact that election administration bodies throughout the world use both human and material resources to improve free, fair, and credible processes since they are processes rather than events.

However, with so many close polls in Nigeria’s history, the process has taken on a new and hazardous dimension in recent times. It is crucial to emphasize that Nigeria’s electoral system faces a significant challenge with the persistent problem of inconclusive elections becoming more commonplace in the country’s election administration. As a result, this topic is especially conducive to investigation within the framework of the program.

Nigeria’s electoral history and procedure show that inconclusive elections are a recent but frequent occurrence. The fact that there has been so much discussion over inconclusive elections in the public sphere highlights how crucial elections are to democracy. The voter is adamant about having the ability and right to choose the people who will lead the affairs of the country, therefore they want their votes to matter in addition to simply casting them. In this sense, Joseph (1987) contended that while elections do not always ensure beneficial democratic governance, it is also true that elections are central to the contemporary understanding of democracy, which emerged from the contemporary society’s incapacity to accept the traditional democratic ideal of incorporating all citizens in the decision-making process. Conversely, Abdulyakeen (2022) conjectured that despite election abuse, misuse, and electoral system manipulation, elections continue to be crucial for deciding key issues in the majority of political systems. Elections, for

instance, show that genuine political power originates from free and fair elections, and that legitimate elections free from anomalies and malpractices are necessary for democracy to survive. Additionally, the entire adult population's right to vote, regular elections in the context of constitutionally open competition for legislative seats, peaceful campaigning, uninfluenced secret voting, accurate tallying and reporting of election results are all necessary for free and fair elections. In spite of the fact that inconclusive election is well provided for in the Electoral Act 2010 as well as Independent Nigeria Electoral Commission (INEC) Guidelines and Regulations many of the political gladiators see inconclusive election as a clever and deceptive way of manipulating the electoral process to favour a particular political party that is why the former speaker of the House of Representatives. Dogara (2019) cautioned the Independent National Electoral Commission (INEC) against declaring elections to be inconclusive in order to avoid creating a risky precedent. At least six states in 2019 had their elections ruled invalid by INEC, including Bauchi, the home state of the former speaker. Speaking at the People's Democratic Party (PAP) national executive council meeting in Abuja, Dogara mentioned election-related issues in Ghana and other African nations, claiming that only Nigerian elections are deemed to be inconclusive. That INEC, under the direction of a world-class history professor, will establish this risky and legitimate precedent in our political history is truly regrettable. It is pure, what has transpired.

Nigeria's political landscape has always included elections since the country's restoration to democracy in 1999. This is the case because democracy, as defined by Appadorai (1975), is a form of governance in which the people themselves pick representatives to represent them and use their authority either directly or through representatives. Stated differently, democracy guarantees that citizens are involved in their governance by electing representatives. In general, elections are seen as a formal process of decision-making that gives eligible voters plenty of options to select candidates running for elected office based on a range of political platforms. It provides a channel through which eligible voters can choose the right candidates to be given the reins of power in order to ensure effective governance. Elections gained popularity because direct democracy, which was used in the Greek City States at the time, is almost impossible to implement due to population growth. Election Management Bodies had to be established in order to ensure free, fair, and legitimate electoral processes. The electoral commission's organization and nomenclature have undergone modifications in Nigeria. The Independent National Electoral Commission (INEC) is the current electoral umpire tasked with the difficult responsibility of ensuring free, transparent, fair, and credible elections in the nation. It was formerly known as the Federal Electoral Commission (FEC), Federal Electoral Commission (FEDECO), National Electoral Commission (NEC), and National Electoral Commission of Nigeria (NECON). It is significant because INEC is the only electoral body that was genuinely founded to be free from the shackles of any branch of the government. This explains why the Independent National Electoral Commission (INEC) is stressed in its name. Its independence will provide it the freedom to hold universally recognized general elections in which the real winners of the contests might be declared.

The Independent National Electoral Commission (INEC) faced widespread international condemnation for carrying out its constitutional duties, particularly with regard to its involvement

in the conduct of the general elections in 2003 and 2007, which were found to be rife with irregularities, violence, and massive manipulation. The former president, Late Alhaji Umaru Yar'Adua, was forced to acknowledge that the election that put him in office was heavily rigged due to the scope of the anomalies that marked the electoral proceedings. Fortunately, both domestic and international observers viewed the general elections held in 2011 and 2015 under Prof. Atahiru Jega's chairmanship as largely free, fair, and credible. This gave Nigerians greater hope and confidence in the electoral umpire's ability to uphold the will of the people and ensure that their choices were respected and that their needs were met. This is not to argue that there weren't any isolated incidents of violence or other anomalies typical of Nigerian elections.

Every ordinary Nigerian has been wondering what would happen to the general elections that are scheduled to take place nationwide by 2019 and beyond if the electoral body is unable to declare winners in the recently concluded staggered elections of the Kogi and Bayelsa States on their first election days. This paper aims to investigate the problem of inconclusive elections in Nigerian democracy, providing insights into its causes and suggesting ways to rectify this aberration in our political system.

Statement of the problem

The first instance of INEC-declared IGEs occurred during the 2011 Imo state gubernatorial election, following twelve years of democratic experience beginning in 1999. Although the incumbent governor of Imo attempted to employ the IGEs method to influence the 2011 gubernatorial vote and its result, it was unsuccessful in doing so; however, it did pave the way for the governor's continued tenure in the state's 2015 gubernatorial election. The same thing happened to the states of Anambra in 2013 and Kogi and Bayelsa in 2015. The aforementioned tactic facilitated the ascent to power of the ruling All Progressives Congress (APC) in Osun state's 2018 off-cycle gubernatorial election as well as in Kano and Plateau states' 2019 elections. One observation regarding the IGEs is that, in comparison, the final supplementary polls show reduced voter participation as shown by voter turnout. Once more, the final election's total victory margin is typically negligible in relation to the preliminary polls. Because of this, winning via the IGEs plan could be compared to winning using unconventional methods, particularly in cases where a losing candidate ultimately turns around and wins, as has happened in the states of Osun, Kano, and the Plateau. Therefore, it appears concerning that the geometric growth of the IGEs from one event in one state in 2011 to 12 incidents in 11 states by 2019 has occurred. Given that IGEs are becoming a technical weapon against the opposition, many Nigerian voters find this trajectory intolerable (Thisday, 2019).

Momoh and Adejumbi (1999) eloquently emphasized this point, saying that elections play a pivotal role in the democratic process by fueling representative government. They also act as a tool for the state's legitimization and control over the reins of power, while also guaranteeing political accountability to the people. Thus, the issue that needs to be asked is: How can inconclusive elections support or contradict the previously proposed elements of free and fair elections?

It should be noted that the number of inconclusive elections in the nation's recent elections has increased. An inconclusive election not only exacerbates stress, breeds worry, and generates the possibility that people may begin to doubt the integrity, sanctity, and legitimacy of the electoral body, but it also fosters resentment, latent animosities, concealed animosity, and mutual suspicion. This study's primary goal is to assess the reasons behind Nigeria's inconclusive elections, their impact on security, and how to make amends in 2023. However, the researcher seeks to achieve the following objective:

- i) To identify the reasons for Nigeria's inconclusive elections.
- ii) To assess the impact of a hung election on democracy and its implications for security.
- iii) To determine INEC's contribution to the abolition of disputed elections in Nigeria.
- iv) To ascertain the obstacles INEC must overcome in order to hold legitimate elections in Nigeria.

Conceptual clarification

A study of this size cannot be finished without clearly outlining the key concepts that serve as its pillars. We are interested in the following concepts: election and election with no clear winner.

Election

The election process gives eligible voters a voice in national administration. Voting in recurring elections allows for this to happen. According to Dye (2001), elections are a key tool used in democratic societies to find new political leaders. It is essential for citizens to participate in any democracy effectively. Heywood (2000) saw elections as a means of selecting members of electorates, a specified entity, to occupy positions. He maintained that elections give eligible voters plenty of chance to select candidates who meet the qualifications and make the kind of decisions necessary to hold public office in the people's name. Elections give eligible residents a way to vote and help choose the candidates running for different elective offices.

Inconclusive election

The conclusion of elections in Nigeria without a clear winner being returned is a developing tendency in the country's electoral process. It suggests a scenario in which elections are conducted, but the results are canceled so that the election winners cannot be determined. Put another way, a significant number of ballots were canceled during the polls because of reported violence and other random irregularities, thus the returning officers were unable to announce the final results that would have determined the genuine winners. Supplementary elections are called as a result of this scandal, and the results determine the candidates' final status.

Section 33 states that supplementary elections, a declaration of suspension of the voting process, or the announcement of an additional day for the exercise are frequently referred to as inconclusive elections, according to Babalola A. M. et al. (2019).

According to Onah and Chukwu (2019), the election was not definitive is a situation in which irregularities resulting from cancellations in some electoral units prevent the electoral umpire from declaring the outcome of the election, thus sufficiently undermining the electoral laws, rules, and regulations supporting the election. Some of the following circumstances lead to inconclusive elections and damage the credibility of the polls: Election results from several polling places or electoral units were canceled owing to anomalies; major security breaches occurred in a number of the electoral districts; and other incidents included the absence of elections in certain electoral units. According to Nigeria's election enabling legislation, an election should be declared inconclusive if the number of voters who lost their right to vote due to unfavorable incidents appears to be higher than the number or the difference between the winner and runner-up. This is because those voters have the potential to change the outcome of the entire election if given the opportunity to exercise their right to vote.

Nweke and Emordi (2020) further argued that the notion of a "inconclusive election" is a namby-pamby occurrence that has become so common in Nigeria that it has become a new lexicography of election platitudes and clichés. The problem with the term "inconclusive election," which is so popular, is that there are no scholarly or academic definitions for it because it hasn't been put through such rigorous scrutiny. This paper aims to define the seemingly unclear compound-concept of inconclusive election through the application of a juridical technique.

In a related development, Abah and Nwoku (2016) assert that the conclusion of elections in Nigeria without a clear winner is a growing occurrence in the country's electoral process. It suggests a scenario in which elections are conducted, but the results are canceled, making it impossible for winners to be declared. Stated differently, an election is deemed inconclusive if there is a candidate who fails to meet the required number of votes to be declared the winner following the polls. In other words, "he or she must fulfill all legal prerequisites, obtain the majority of legitimate votes cast in the election that provides all eligible voters with the chance to exercise their right to vote." In the event that no candidate meets this prerequisite, the election is deemed to be unresolved.

Inconclusive elections in Nigeria: Views on the root causes

The fundamental causes of Nigeria's inconclusive elections have generated differing opinions. On the one hand, election results that are inconclusive are typically attributed to INEC, the Nigerian electoral oversight organization, canceling results mostly because of electoral violence. It is undeniable that violence surrounding elections has turned into a serious problem for Nigerian politics. It has been impeding our nation's efforts to establish a sustainable democracy.

Because there is always a chance that there may be widespread violence following the election procedures, electoral violence has a history that is as old as Nigeria. To support this claim, Abbass (2008) used the following phrases to describe the political climate in Nigeria during election seasons:

Political unrest has always been a hallmark of every Nigerian election held since the 1950s. Thus, there are concerns about the electioneering processes that may be linked to violence and individual

rights violations. Therefore, since Nigeria's independence, elections have proven to be a major political liability, producing considerable political turbulence and endangering the existence of corporate Nigeria, rather than being a process and a method of exercising legal political rights. In Nigeria, elections have always been seen as a "do or die" situation.

According to Ogefere (2015), since Nigeria reverted to democratic rule in 1999, there have allegedly been more than 15,700 deaths from political, intercommunal, and sectarian violence. There has been a contention that politicians who are desperate and determined to use whatever means necessary to win elections have frequently coordinated the wave of violence during elections. They use their goons, fully equipped with deadly weapons of mass destruction, to threaten, harass, and coerce voters in an attempt to achieve their vile goals. They also aim to sabotage the democratic processes. Extreme circumstances occur before, during, and after the elections that result in the maiming of lives and assets valued at billions of Naira. It is quite regrettable that our security personnel have been repeatedly linked to plotting to disenfranchise voters in plain daylight by teaming up with political gladiators and obnoxious goons.

Even though the poll was hailed as one of the freest and fairest in the nation, Ogefere (2015), citing Human Rights Watch, disclosed that election-related casualties and communal violence in the Northern part of Nigeria following the April 2011 Presidential elections resulted in over 800 deaths. The argument we are attempting to make is that electoral violence has consistently existed throughout the nation's democratic regimes prior to, during, and following elections. At some Republics, this threat has cost the nation its hard-won democracy. For example, politicians' failure to play by the rules of the political game led to the first military intervention that precipitously terminated the First Republic in 1966 with Major Kaduna Nzeogwu's coup (Ndoh, 1997). There are countless examples, and the Second Republic was not exempt.

But it was thought that the Kogi State gubernatorial election might have produced a different outcome if not for the preventable political violence that occurred on November 21, 2015, which led to the cancellation of votes in 91 of the 2,400 polling places. Prof. Emmanuel Kucha, the chief returning officer of the poll, based his declaration of an inconclusive election on electoral norms, claiming that the total number of ballots rejected outweighed the vote difference between the two front-runners (Ibrahim, 2015). Kucha specifically stated that incumbent governor Idris Wada of the People's Democratic Party (PDP) received 199,514 votes, while Prince Abubakar Audu of the All Progressive Congress (APC) received 240,867. There were 41,353 votes separating the two front-runners, and 49,000 votes were canceled overall. So, to ascertain the real victor, a rerun election was planned.

Nor was the situation in Bayelsa State any different. The election results in one local government area, Southern Ijaw, had to be canceled because the state, which had only eight local government areas, was plagued by extraordinary violence and several anomalies. It is now quite evident that INEC declares elections invalid due to results at the polls being canceled because of violence. At a one-day roundtable for stakeholders and civil society on INEC and inconclusive elections, the chairman of INEC, Mr. Oluwale Osaze Uzzy, the Director of Voter Education in the Commission, stated that the country's inconclusive elections are caused by the desperation

of most politicians to win. He continued by saying that the political class views elections as a “do or die” situation, which is why violence, intimidation, and bribery of poll workers and voters are used to sabotage them. Ugwuanyi (2016).

Remarkably, section 128 of the Electoral Act declares that “Anyone who acts or incites others in a disorderly manner at an election commits an offence and shall be liable on conviction to a maximum of N500,000.00 or imprisonment for a term of 12 months or both.” It is instructive to note that, since the restoration of democracy in 1999, there has not been a high-profile prosecution or conviction for election violence or malpractices, despite the existence of this Act and other pertinent laws. This suggests that the laws pertaining to electoral offenses are not being strictly enforced.

Moreover, the issue is frequently made worse by the fact that the criminals and miscreants typically outnumber the security personnel tasked with maintaining order before, during, and following the polls. Furthermore, the security personnel are ill-prepared to deal with security threats when they materialize during the polls due to their inadequate equipment. As they employ force or coercion, intimidation, harassment, and other tactics to accomplish the excessive objective of their employers, security personnel have been charged on multiple instances with engaging in partisan politics during elections. Furthermore, there have been instances of dishonest INEC employees working together with candidates to rig the results of elections in order to benefit their desperate bosses. One instance of this was when three separate result sheets from a recent election were used to justify the detention of an INEC officer by the police. Regretfully, the official has not been charged as of yet. There are countless more instances of INEC officials engaging in corruption while performing their duties. In keeping with the previous statement, INEC’s technological voting materials have flaws. Desperate politicians have a tendency to take advantage of technology devices that malfunction or are handled improperly by inexperienced INEC workers in order to further their irrational desires. If security personnel are unable to keep things under control in this scenario, there may be violence and other irregularities that taint the way the polls are conducted. However, some worried parties believe that the primary motivation for the INEC led by Prof. Yakubu to invalidate the votes and declare inconclusive results was to carry out a covert plan from higher places that vehemently opposed the announcement of a winner.

To support this claim, it was reported that, only a few days before the Kogi governorship election, Yakubu Mahmood, the head of INEC, met in secret with Buhari. This raises the possibility that he was following a script that the president had given him. Whatever the case, inconclusive elections have been steadily increasing in frequency within the Nigerian political system, and coordinated measures are needed to stop this unsightly phenomenon regardless of its underlying reasons.

Inconclusive elections and constitutional position in Nigeria

As was made very obvious earlier in our discussion, INEC has regularly used the cancellation of election results at some polling places to determine the outcome of indecisive elections when the overall number of cancelled votes is more than the vote difference between the front-runners. INEC has frequently supported her claims and positions with pertinent sections of its

rules. At this juncture in our political evolution, an examination of the Federal Republic of Nigeria's 1999 Constitution as modified can prove beneficial. As is well known, a nation's constitution serves as its foundational legal code. It establishes government institutions, lays out what should and shouldn't be done, and specifies penalties for breaking any of its rules. In this regard, the constitution makes ample provisions clear regarding the procedures and prerequisites for declaring a candidate for the office of governor or president following the election.

To that degree, the Grundnorm's provisions cannot be changed or added to by any other law. This may have advised the National Assembly to follow the Constitution, which specifies, among other things, that:

In an election to the office of the President or Governor or, whether or not contested and in any contested election to any elective office, the results shall be ascertained by counting the votes cast for each candidate and subject to provisions of Sections 133, 134 and 179 of the Constitution, the candidate that receives the highest number of votes shall be declared elected by the appropriate returning officer.

This is stated in section 69 of the Electoral Act in reference to the Constitution. It appears that neither the Constitution nor the Electoral Act contain any provisions stating that the returning officer should declare the elections inconclusive if a predetermined number of votes are canceled at the polling places or if the election was prevented from happening because it was made possible through intentional violence. Nonetheless, the INEC chairman explained the wave of inconclusive elections by saying that they happen when, following polling, no candidate satisfies the requirements before a winner is declared. He insisted that in order for a candidate to be declared victorious, he or she had to meet all legal requirements, including receiving the majority of valid votes cast in an election where all eligible voters were given the chance to cast a ballot and, in the case of executive positions, meeting the prescribed spread within the constituency. He contended that any other action would violate the Electoral Act, the Constitution, and the core values of democracy. It can entail declaring winners of the elections even when they did not receive the majority of valid votes (Daily Nigeria News, 2016).

As convincing as the aforementioned argument would seem, concerned Nigerians felt that the INEC rules served as the foundation for the term "inconclusive election" to be introduced into Nigerian politics. Every political observer who pays close attention to politics is constantly wondering how INEC came to decide to base its actions on its own derivative guidelines, which are far less adequate than the Constitution, which has sufficiently covered the topic, and the Electoral Act, which deferred to the same provisions of the Constitution. Even while opinions on INEC's decision to declare the elections in both the Kogi and Bayelsa States inconclusive vary, the reality remains that our Constitution and the Electoral Acts should always act as a compass when navigating murky places in our electoral system. Even if the INEC had stuck to this strategy in the general elections of 2003 and 2007, there's a good chance that the results would not have been announced because of the extreme violence and other anomalies that plagued the polls. In order to stop the rapidly spreading culture of inconclusive elections, we should be quick to clarify that we are not endorsing violence or irregularities during elections. Rather, we

are attempting to emphasize that our electoral laws and the Grundnorm should take precedence over any other laws on matters pertaining to our electoral processes. Any case involving matters relating to elections can be heard by our legal system. For the time being, it appears to be the last chance for the average person to have elections held in violation of the nation's electoral laws void or annulled. Even better, electoral courts ought to be established with the responsibility of trying and convicting anyone involved in an election in Nigeria.

Empirical review on inconclusive elections

The concerning problem of inconclusive elections in Nigeria has been brought to light by empirical study, which has linked the cause to the 2019 INEC Regulations and Guidelines. Specifically, the research has pointed out that the margin of lead principle (MOLP) in the 2019 elections would be taken into consideration. (Sule and Sambo, 2019). According to Babatola et al. (2019), political actors are the driving force behind the conditions that lead to an inconclusive election in Nigeria, which they claim is a rape on democracy. Inconclusive elections are caused by Nigerian voters who occasionally volunteer to act as thugs for politicians in order to continue violent and fraudulent conduct during elections.

While Abah and Nwoku (2016) blamed Nigerian politicians for not playing the political game by the rules, Ojoye (2019) and Ayorinde and Olajide (2011) concluded that inconclusive elections have constituted an emerging threat to Nigerian democracy. Zakari (n.d.) on the other hand saw inconclusive elections as part of a robust and steady democratic process with steady progress in Nigeria. Furthermore, Agbu (2016) said that the partial use of technology allowed for election tampering, which is the reason elections are deemed undecided. These actors' desperation and will to succeed at all costs frequently lead to ambiguous poll results. Beyond underdeveloped nations, the research team of Bosco and Verney (2016), Henley (2019), and Jones and Balmer (2018) observed that inconclusive elections pose a global challenge to the democratic evolution of affluent nations such as Spain and Italy.

These facts point to the inevitable outcome of close elections in representative democracies. Even though power centers may use the frequency of inconclusive elections to further their own agendas, they may not always be orchestrated and enforced to benefit a certain group of people's interests. Therefore, it is not out of the ordinary for an election to begin today and conclude later, particularly when this arrangement is intended to guarantee adherence to constitutional electoral provisions. On the other hand, it is uncommon for electoral delays to be caused by acts of violence and malpractice. In contrast, while some developed countries record inconclusive elections to address minor constitutional issues pertaining to a majority win, most developing countries, including Nigeria, declare inconclusive elections due to electoral irregularities, tense security situations, partisan misconduct, and occasionally, collusion between political actors and the electoral management body over the calculation of the winning margin.

Rerun elections between the top two candidates typically take place in the former case as well, with an exceptionally smooth electoral procedure. But in the latter case, the replays are typically severely compromised by a political environment and electoral climate rife with tight

security concerns, intimidation, threats, and massive electoral anomalies. All eligible candidates from the original elections are allowed to run in the rerun elections that followed the inconclusive results in Nigeria; however, the calculation of the lead margin is incorrectly based on the difference between the two front-runners in the initial polls.

Methodology

This work uses a mixed method research approach, meaning that both quantitative and qualitative data must be gathered. Respondents from six geopolitical zones in Nigeria-Kano, Kaduna, Enugu, Imo, Rivers, and Osun states-make up the study's population. The content analysis strategy-based approach tends to follow scientific rigors and research methods that include methodical data gathering, organization, description, and interpretation in different formats. The methodical, impartial, and cogent investigation of textual contents in order to identify communication patterns is part of the content analysis approach. By using trustworthy and replicable studies as primary data sources, the research breaks free from the physical and technological constraints related to gathering unprocessed field data. This methodology aligns with the use of sophisticated meta-analysis, synthesis of data, and assessment that seasoned researchers cultivate over time.

Instrument of data collection

The instruments for gathering data for this study include the following;

(i) Documentary Instruments

In order to conduct this research, a variety of scholarly articles as well as official administrative records and papers from government ministries and agencies in the states of Kano, Kaduna, Enugu, Imo, Rivers, and Osun will be gathered. These records were gathered, arranged, and examined critically. This was done to allow the researcher to compare the information from the studied literature with the respondents' responses.

(ii) Questionnaire Instrument

The researcher individually created and sent a highly structured questionnaire. The distribution of the questionnaire was made throughout all of the chosen local government areas, which make up the target population, to guarantee that accurate information was obtained and that the questionnaire covers the whole population of the study.

(iii) Personal Interview

During this investigation, the researcher also conducted in-person interviews to get first-hand information. It is a tool for gathering data that gives the researcher face-to-face interaction and in-depth knowledge of the research issue. This tool was chosen because it allows for more in-depth investigation of research topics.

Validity and reliability of instruments

By confirming that the instruments' contents are in line with the study's goals and research topic, the researcher validated the instruments. Additionally, attempts were taken to guarantee that every element deemed pertinent to the investigation is sufficiently covered.

Furthermore, the pretest method—which involves piloting the instruments on a small group of respondents who are not the target population but are located in the same study location—was used to guarantee the reliability of this study (Oguonu and Anugwom, 2006). This was carried out over a range of times to see if their earlier and later reactions would be consistent. The questionnaire was structured in a clear, succinct, and easy-to-understand manner to facilitate respondent comprehension and guarantee consistency in their responses, while also ensuring the instruments' high reliability. Finally, the external criterion method was used to ensure that the research has high validity. This was accomplished by determining the accuracy of the results obtained from a specific instrument by comparing them to both the research obtained from questionnaires and existing knowledge. The aforementioned techniques were meticulously implemented to guarantee the study's high degree of validity and reliability.

Results and discussion

In this section, empirical results are presented and discussed utilizing a combination of the many units of analysis inherent in electoral violence and voter participation in Nigeria, as well as electoral malpractice and election legitimacy. The argument that the IEs are detrimental to democratic consolidation and are declared by the INEC based on a fictitious margin of lead factor is thus supported empirically by the following subheadings, which leave out other crucial variables like voter turnout and the proportion of voters with permanent voter's cards (PVCs).

Electoral malpractice and credible elections in Nigeria

Election-related malpractice has always been a part of Nigerian election history (Agbu, 2016). Undoubtedly, electoral misconduct weakens electoral integrity and lowers the democratic worth of legitimate elections.

Both the winning and losing political parties typically accept the results of elections that comply with the law. However, when the opposite is true, the results are contested, and what usually happens next is rejection, legal action against the decision, and in the worst situations, bloodshed. There are several instances of ballot box snatching, election material diversion, election result falsification and mutilation, and financial bribery of election officials in each of the 11 states in Nigeria where the IGEs were held (see Table 1). While violent elections do not always result in inconclusive results in Nigeria, the 12 instances of IGEs are largely and in various ways marred by incidents of electoral malpractice, irregularities, and violence. Although the principle is often triggered by the circumstances listed in the table, the INEC typically considers the MOLP when declaring elections to be inconclusive. Thus, the MOLP or the margin of victory failing to meet the constitutional requirements is a consequence of the factors presented in Table 1.

Table 1. Electoral irregularities and violence: The recurring features of the IGEs and SGEs in Nigeria, 2011–2019

El. Year	Reasons for incon. Elect	SGEs characterized by	El. year	Reasons for incon. elect.	SGEs characterized by
2011 and 2015 election cycles (5 observations in 4 states)			2016 and 2019 election cycles (7 observations in 7 states)		
Imo (2011)	Irregularities, partisan misconduct, manufacturing of election results, late arrival of election materials, no election in some wards	Violence, intimidation, abuse of power of incumbency, youth resistance to electoral malpractice	Osun (2018)	Irregularities, non-use of electronic devices, use of manual accreditation, missing result sheets, abscondment of election	Violence, malpractice, vote bribery, thugs' intimidation despite huge deployment of security operatives
Anambra (2013)	Snatching of ballot box, huge deployment of security personnel, no candidate polled 25% in two-third of 21 LGAs	Voter apathy, huge deployment of security personnel and buying of votes	Adamawa (2019)	Electoral irregularities such as fraudulent falsification of election results and vote buying	Voter apathy
Imo (2015)	Irregularities like electoral malpractice and falsification of election results	Intimidation, vote buying, multiple thumb printing	Bauchi (2019)	Fraudulent falsification of election results, the use of court injunctions on election collation and announcement of results	Relative calmness
Kogi (2015)	Violence, huge deployment of security personnel, snatching of elections materials, over voting	Relatively calm with voter apathy and low voter turnout	Benue (2019)	Voters' inability to vote in some areas	Intimidation, harassment and vote buying
Bayelsa (2013)	Massive electoral malpractice, severe military activities, intimidation and harassment of voters, poll officials and party agents	Militarized electoral process, no election in Kolana ward 17, late arrival of poll materials, harassment and intimidation	Plateau (2019)	Election irregularities, intimidation and harassment of voters, poll officials, and party agents	Intimidating utterances, threatening statements and compelling comments

El. Year	Reasons for incon. Elect	SGEs characterized by	El. year	Reasons for incon. elect.	SGEs characterized by
2011 and 2015 election cycles (5 observations in 4 states)			2016 and 2019 election cycles (7 observations in 7 states)		
			Kano (2019)	Violence, failure to use the smart readers, overvoting and other irregularities	Voter apathy due to massive electoral malpractice and violence
			Sokoto (2019)	Irregularities, violence, failure to use the smart card readers, over voting, and intimidation	Voter apathy arising from massive electoral malpractice and violence

Note: incon. elect. means inconclusive election, SGEs means supplementary gubernatorial elections.

Source: Compiled by authors from INEC and online media data.

The Independent General Elections (IGEs) in Nigeria are a postponed electoral procedure that is typically designed to facilitate electoral manipulation for political gain. The 2011 Imo gubernatorial election had a number of significant anomalies. The Oguta local government area (LGA) election, together with the Mbaitoli and Ohaji/Egbema LGA elections, was declared inconclusive. Due to stage-managed late arrival of election materials, there was no election in Ngor/Okpalla (Ayorinde and Olajide, 2011). Politicians later appropriated the materials, which had been released on schedule. When it became apparent that the poll officials had noticed the hijack, they were later set free. The 2011 Imo governor's race was marked by this degree of electoral fraud and the threat of violence, which gave the IGEs the reputation of being a risky political event in Nigeria. Beyond what was seen in the first election, intimidation, the use of force, and threatening statements were made in the impacted areas on May 6, 2011, the day of the final poll. After multiple failed attempts to rig the results, the opposition All Progressives Grand Alliance (APGA), which had roughly 18,000 votes in the first round of the exercise, ultimately prevailed in the repeat poll.

The 2019 Bauchi governorship election serves as another example of how contentious IGEs may be in Nigeria. The INEC ruled the Bauchi governorship election inconclusive because the number of invalidated votes (45,312, Table 2) exceeded the margin separating the two front-runners, Mohammed Abubakar of the APC and Bala Mohammed of the People's Democratic Party (PDP). The INEC established a Committee to investigate the Bauchi poll in response to the issues surrounding the election. The Committee found that 2,533 votes were cancelled out of 25,330 forged ballots in four polling places in Ningi LGA. In connection with this, armed gangs brutally interrupted the Tafawa Balewa LGA election results collation process. Seven of the local government's eleven registration zones were impacted by this outage. The INEC Committee's conclusions, similar to those in Ningi, indicated that the "missing" results in the impacted areas were "available and in safe custody" (News Agency of Nigeria, 2019: para. 5). Additionally, Dominion

Anosike, the returning officer for Tafawa Balewa LGA, and his family members were threatened with death by armed groups. The officer was terrified as a result, and she left the area and was replaced by a new police officer.

Furthermore, Governor Abubakar used great effort to obstruct the state's election process by obtaining an injunction against the Tafawa Balewa LGA election results collation process through a Federal High Court. The Court of Appeal, a higher court, swiftly overturned the injunction. The INEC was eventually authorized by the Justice Ekwo-led Court of Appeal to move on with the collation and announcement of the previously postponed results in Bauchi (Akinwale et al., 2019). The exercise culminated in a supplementary election on March 23, 2019, in the impacted areas, where the opposition again defeated the incumbent governor. The PDP candidate received 6,376 votes, while the APC governor received 5,117, increasing the difference between the two candidates' totals by 5,318 votes (Asadu, 2019).

When politicians realize that an election is unlikely to go in their favor, it is evident what a power grab elections (the IGEs) have become in Nigeria. They plan acts of violence to support the annulment of election results in a few key districts. It is implied that the IGEs undermine the validity of these surveys. The graphic details of the IGE trend in Nigeria from 2011 to 2019 are depicted in Figure 1. The graph illustrates how, over the course of eight years, the IGE impacted seven states in the north and four in the south of Nigeria.

Table 2. Summary of initial results of IGEs in Nigeria between 2011 and 2019

El. Year	El. Type	Region	State	Initial result (votes) Leading party 2nd party		Margin (%)	C. votes
2011	General	SE	Imo	NA*	NA**	18,000	NA***
2013	Off-cycle	SE	Anambra	APGA (174,710)	PDP (94,856)	79,854 (29.62)	113,113
2015	General	SE	Imo	APC (385,671)	PDP (306,142)	79,529 (11.50)	144,715
2015	Off-Cycle	NC	Kogi	APC (240,867)	PDP (199,514)	41,353 (9.39)	49,953
2015	Off-Cycle	SS	Bayelsa	PDP (105,748)	APC (72,594)	33,154 (18.59)	120,827
2018	Off-cycle	SW	Osun	PDP (254,698)	APC (254,345)	353 (0.07)	3,498
2019	General	NE	Adamawa	PDP (367,471)	APC (334,955)	32,476 (4.62)	40,988
2019	General	NE	Bauchi	PDP (469,512)	APC (465,453)	4,059 (0.43)	45,312
2019	General	NC	Benue	PDP (410,576)	APC (329,022)	81,554 (11.03)	121,019
2019	General	NW	Kano	PDP (1,014,474)	APC (987,819)	26,655 (1.33)	128,572

El. Year	El. Type	Region	State	Initial result (votes)		Margin (%)	C. votes
				Leading party	2nd party		
2019	General	NC	Plateau	PDP (583,255)	APC (538,326)	44,929 (4.01)	49,377
2019	General	NW	Sokoto	PDP (489,558)	APC (486,145)	3,413 (0.35)	75,403

Note: NA = Not Available; NA* = online report showed that APGA was leading in 12 LGAs; NA** = online report indicated that Peoples Democratic Party (PDP) was leading in 11 LGAs; NA*** = elections were cancelled in 4 LGAs and 1 Ward and the margin of lead difference between the two leading candidates is less than the total registered voters in the affected areas; NC = North Central; NE = North East; NW = North West; SE = South East; SS = South South; SW = South West; C. = cancelled; El. = election; IGEs = IGEs. Source: Authors' compilation from INEC and online media data TABLE 2 Summary of initial results of IGEs in Nigeria between 2011 and 2019 (cont.).

Table 3. Summary of final results of IGEs in Nigeria between 2011 and 2019

El. year	El. Type	Region	State	Final result (votes)		Margin (%)
				Leading party	2nd party	
2011	General	SE	Imo	APGA (336,859)	PDP (290,496)	46,363 (7.39)
2013	Off-cycle	SE	Anambra	APGA (180,178)	PDP (97,700)	82,478 (29.68)
2015	General	SE	Imo	APC (416,996)	PDP (320,705)	96,291 (13.05)
2015	Off-Cycle	NC	Kogi	APC (247,752)	PDP (204,877)	42,875 (9.47)
2015	Off-Cycle	SS	Bayelsa	PDP (134,998)	APC (86,852)	48,146 (21.70)
2018	Off-cycle	SW	Osun	APC (255,505)	PDP (255,023)	482 (0.09)
2019	General	NE	Adamawa	PDP (336,386)	APC (376,552)	40,988 (5.63)
2019	General	NE	Bauchi	PDP (470,570)	APC 475,888	5,318 (0.56)
2019	General	NC	Benue	PDP (345,155)	APC (434,473)	89,318 (11.46)
2019	General	NW	Kano	PDP (1,033,695)	APC (1,024,713)	8,982 (0.44)
2019	General	NC	Plateau	APC (595,582)	PDP (546,813)	48,769 (4.27)
2019	General	NW	Sokoto	PDP (511,611)	APC (512,002)	391 (0.04)

Source: Authors' compilation from INEC and online media data.

Tables 2 and 3 give additional statistical analysis of the two leading parties' initial and final outcomes in the impacted states' gubernatorial elections throughout the time under discussion. The figures show that there is typically little variation in voter turnout in the extra polls, with the difference between the first and final results ranging from 0.02% in Osun in 2018 to 3.11% in Bayelsa in 2015. In light of these negligible percentage discrepancies, there was no reason for the first-round governorship elections not to conclude.

Table 4 presents the variations between the first and last results of Nigeria's gubernatorial elections for the two front-runners in 2011 and 2019. The statistics in the Table demonstrate that there isn't a statistically significant difference that would prevent the election from finishing in the first round. This lack of difference is due to the fact that the presence of unethical electoral methods, violence, and other issues that characterized both the preliminary and final elections.

Table 4. Difference between initial and final GERs in eleven Nigerian states, 2011–2019

El. year	El. Type	Region	State	IR (votes)	FR (votes)	Diff. (%)
2011	General	SE	Imo	NA	627,355	NA
2013	Off-cycle	SE	Anambra	269,566	277,878	8,312 (1.52)
2015	General	SE	Imo	691,813	737,701	45,888 (3.21)
2015	Off-Cycle	NC	Kogi	440,381	452,629	12,248 (1.37)
2015	Off-Cycle	SS	Bayelsa	178,342	221,850	43,508 (10.87)
2018	Off-cycle	SW	Osun	509,043	510,528	1,485 (0.15)
2019	General	NE	Adamawa	702,426	712,938	10,512 (0.74)
2019	General	NE	Bauchi	934,965	946,458	11,493 (0.61)
2019	General	NC	Benue	739,598	779,628	40,030 (2.63)
2019	General	NW	Kano	2,002,293	2,058,408	56,115 (1.38)
2019	General	NC	Plateau	1,121,581	1,142,395	20814 (0.92)
2019	General	NW	Sokoto	975,703	1,023,613	47910 (2.40)

Note: IR means initial result; FR means final result; Diff. means difference (between initial and final results); GERs means gubernatorial election results.

Source: Authors' compilation from INEC and online media data.

Once more, the subject of election-related violence including graphic slaughter was not very pressing during Nigeria's 1998–1999 election season. This is a result of Nigerians' sincere waiting for democratic governance, which became achievable in 1999, as they were truly tired of harsh military regimes. But the election seasons that followed in 2003 and 2007 turned tumultuous and bloody, with 100 and 300 lives lost, respectively. Despite the fact that the 2011 elections were hailed as being comparatively free and fair, this turned into something unusual. Because of the use of digital technology, there were comparatively fewer fatalities in the 2015 elections than in the 2011 ones (Nwangwu et al., 2018). Sadly, the results of the 2015 elections were not maintained in the 2019 elections, which resulted in the loss of 626 lives and the destruction of property valued at millions of Naira (SB Morgen Intelligence, 2019). It is stated that in the southern Kaduna state's Kajuru LGA, another 130 persons perished.

An analysis of security threats and mitigation measure for the 2023 general election in Nigeria:

Summary of an in-depth interview (qualitative data)

Participants from each of Nigeria's six geopolitical zones were assigned codes. Anambra (AN2), Imo (IM3), Plateau (PL5), Sokoto (SK6), Bayelsa (BS7), Kaduna (KAD 8) and Osun (OS9) are the states that make up Kano (KA1). Inquiries were made in an effort to provide more information in response to the study's research questions. Finding the reasons for Nigeria's inconclusive elections was the first question.

“The specter of elections not being held in many parts of the country due to insecurity or leading to many cancelled or inconclusive elections is real and if not properly dealt with may lead to constitutional crisis that could present a clear danger to Nigeria’s democracy,” KA1 said in response to this question. “Specifically given its history of flawed or questionable elections, I think this could be a serious threat to Nigeria’s democracy.”

As a result, the rise in violence and unrest poses a severe threat to Nigerian governance as a whole as well as the smooth running of the polls and electoral process. Speaking on the “Framework for election security in Nigeria,” ANO2 also pointed out that electoral politics and election administration have historically been seen as just another kind of warfare, particularly since the general election of 1951. Similar opinions were held by OS9 and BS7, who believed that Nigerian politics are best understood in light of three salient undercurrents depicted in the country’s history: the country’s underdevelopment and challenging topography, which place severe capacity and logistical limitations, as well as imperfections, on electoral administration and governance generally; and the political mobilization of ethnicity for electoral competition under a federal political system intended to reflect and sustain ethnic, not geographical, diversity.

According to RI4, the issue with ethnic diversity from a security perspective was not the diversity itself, but rather the way it was managed through the party system, where political parties used ethnicity to secure ethnic voting bases for elections, and the way that electoral politics could turn violently into ethnic hate speech and violent pre- and post-election conflicts. According to IM3, creating a framework that would lessen the negative effects of these three undercurrents that shape the nation’s election security landscape and change elections from being tools for democratic reversal into ones for democratic consolidation was the main task ahead of the general election in 2023. Core features such as the failure of public security providing, the rise in non-state security provisioning, political manipulation and abuse by security actors, and the increasing individualization and communalization of security required to be addressed by this framework, according to PL5. According to OS9, measures have also been made to weaken and jeopardize the integrity of INEC and the nation’s electoral governance system. He pointed out that the attempt played a significant role in the lengthy discussion over the terms and enactment of the 2022 Electoral Act between the federal executive branch and the legislature. The following query concerned assessing the impact of a close election on democracy and its implications for security.

In response to this query, PL5 observed: The Armed Conflict Location & Event Data Project (ACLED) reported 163 politically connected clashes resulting in 44 fatalities across 30 states in the first nine months of 2022. According to SK6, there was a pattern of violence throughout the geopolitical zones that included party official kidnappings and abductions, as well as attacks on secretariats and conflicts between opposing parties. The statements made by BS7 and KA1 were consistent in pointing out that there had been a spike in political violence and attacks on INEC infrastructure in all six geopolitical zones. According to RI4, the results of the 2023 election could be thwarted by growing insecurity, disinformation, money politics, religion, and ethical distraction. IM3: expressed worries regarding the security of election workers, voters, and materials. It also highlighted the difficulties politics would confront in the wake of ongoing

incidents of kidnapping, violence, banditry, insurgency, and intercommunal strife. The general election in 2023 will be a huge logistical undertaking, according to SK6, which raised concerns about reaching the 176,846 voting places. This would necessitate hiring and preparing about 1.5 million poll workers and security personnel. This is around four times the strength of the armed forces of Nigeria. The four main candidates – Atiku Abubakar of the People’s Democratic Party (PDP), Bola Tinubu of the All Progressive Congress (APC), Peter Obi of the Labour Party, and Rabiu Musa Kwankwanso of the New Nigeria Peoples Party (NNPP) – would be shaped by religion, ethnicity, and money politics, according to AN2.

Regarding the subject of difficulties, RI4 stated that “After the APC decided to run a Muslim-Muslim ticket, religion is likely to feature prominently in debates.” Voter registration drives, which encourage young people to get involved in politics, may also have revolutionary effects and benefit Obi. “If the recent gubernatorial elections and presidential primaries teach us anything, money will still be a major factor in deciding the winner. Lastly, there will likely be an increased level of ferocity in online campaigning, with assaults on opponents, candidates, and INEC likely to be amplified on social media in the lead-up to, during, and even after voting. In a similar spirit, AN2 said that everyone would have continuous access to electoral infrastructure during the campaign and voting period, particularly those who have been internally displaced due to hostilities. Noting that Mahmud Yakubu, the chairman of the Independent National Electoral Commission (INEC), is the first INEC head in the nation’s history to be appointed to a second term, the new report highlighted the significance of the replacement of 19 Resident Electoral Commissioners at the Commission, pointing out the difficult lack of people with integrity in authority will affect the elections. PL5 and KAD8, on the other hand, held the same opinion, believing that the 2022 Electoral Act may have brought about a number of modifications that would further enhance the legitimacy of elections. The new electoral act now defines over voting in terms of accredited voters as opposed to registered voters, and according to IM3, cases of inconclusive elections would be drastically reduced in 2023. Additionally, INEC would be able to review results signed under duress or financial inducement under the new act. The report pointed out that the election’s transparency could be increased if INEC wisely used the technology it had pushed for and been granted through the new electoral act. It also added that the poll’s credibility would be influenced by how freely and unhindered citizens could cast their ballots.

In response to this query, KA1 stated that, especially in the northwest and southeast, insecurity is still a major problem. The existing cultural, infrastructural, and institutional environments in which the polls will be conducted present additional challenges for this operation. Some of these might be lessened if the whole INEC budget were released promptly. Ultimately, the election’s credibility may depend just as much on the role that the security services and the courts play as it does on the election management organization. Parallel to this, SK6 said that Nigeria was currently experiencing an outbreak of insecurity. The country’s six geopolitical zones have all seen acts of violence committed by bandits, terrorists, and secessionists, further separating it along racial, religious, and political lines. It will be very difficult to hold reliable polls in this situation while ensuring the safety of voters and INEC staff. Since INEC has been unable to deploy

to every ward in every electoral district due to insecurity, the organization's ability to carry out continuous voter registration has already been called into question, according to KAD8.

Summary of major findings

The data analysis's conclusions showed how serious an issue inconclusive elections is, with issues ranging from awareness and widespread education to financial burden and security. The PDP accused INEC and the APC of working together during the December 10th legislative rerun election in Rivers State because they believed the APC was abusing their position of power to bribe the electoral commission, while the APC accused the Rivers State government of attempting to bribe the commission. Inconclusive elections place additional burdens on the federal, state, and local governments in Osun, Rivers, Kano, Anambra, Plateau, Bayelsa, and Imo State. This further adds to the unreliability of the electoral process. With the world and impartial observers watching, all of these accusations and counteraccusations do not bode well for Nigeria's democracy.

The election umpire has not consistently applied the same rule to comparable circumstances in national electoral affairs, according to another study conclusion. This raises concerns about the electoral process's credibility. For example, INEC has been unable to explain why the logic is only used haphazardly and why some elections are not eligible for the use of the inconclusive appellation. For example, the commission's detractors questioned why the results of the governorship elections in Ogun and Kaduna states were not deemed inconclusive, particularly given that the stated results were within the "margin of win" range.

This study has also shown that the various electoral offenders who instigated chaos and violence in the polling places during the Osun state governorship election of 2018 and the Kano governorship election of 2019 resulted in the cancellation of election results, resulting in an inconclusive election. This has created the false impression that mayhem, thuggery, and chaos are inherent to the electoral process.

Furthermore, this investigation found that the winner of the first round of voting would have legitimately prevailed in the election, meeting the requirements of the law of simple majority and geographic dispersion, even in the absence of the 2018 supplemental election in Osun State. What then is the purpose of the supplementary/inconclusive election? This poses a significant threat to the electoral process's sanctity, legitimacy, transparency, and integrity.

This study also showed that the 2018 inconclusive/supplementary elections in Osun, Kano, Plateau, and Sokoto State were simply an elite conspiracy, with no input or consultation from the electorate or their representatives. As a result of the wanton political scheming, negotiations, "gentleman's agreement," and horse-trading that occurred prior to the supplementary elections, it cannot be said that the results truly reflect the wishes and desires of the electorates.

Not every eligible voter casts a ballot on election day; in fact, not every person who is registered to vote does so at all. This is because not every registered voter has obtained their PVC. As such, the margin of vote should be immediately eliminated, as it is a pointless electoral exercise.

This study found that when elections are close, voters become disinterested and INEC has to spend more money. In addition to the aforementioned inconsistencies, the study also found inconsistencies in electoral regulations regarding the margin of votes in close elections.

Conclusion

Based on the aforementioned results, this study draws the conclusion that credible and transparent elections are essential to democratic governance, which is based on the desires and will of the majority of voters. Elections are not legitimately called elections if they fall short of this requirement. Additionally, because the results do not accurately reflect the wishes and goals of the electorate, an inconclusive election subverts their electoral will. Since there are conflicting electoral laws governing the process and the electoral umpire has not been able to apply the same standards to comparable circumstances across the nation, the legitimacy of inconclusive elections is debatable. Additionally, because the impartiality of INEC and the integrity of the electoral process have been questioned, inconclusive elections have contributed to voter indifference and a lack of continuous interest in the political process.

Recommendations

In light of the results, the research proposed the following recommendations:

- Eliminating the concept of a vote margin based inconclusive election is necessary. It runs counter to the nation's FPTP electoral system, which is based on geographic dispersion and simple majority. Furthermore, in virtually every instance that has occurred thus far in the nation, the party that leads the first round of elections does not typically win the extra or inconclusive election. In fact, wherever in the nation, indecision has benefited one particular party.
- The National Assembly should also evaluate and streamline any conflicting laws pertaining to elections so they comply with the Federal Republic of Nigeria's 1999 constitution. This is due to the conflicting provisions found in the Federal Republic of Nigeria's 1999 constitution, the Electoral Law 2010 as amended, and the INEC Regulation and Guidelines. These provisions have the potential to cause needless controversy, tension, litigation, indecision, and confusion during the electoral process. This is due to the fact that they currently obstruct an honest and transparent electoral process.
- Additionally, there is a need for more study and scholarly attention in the field of inconclusive elections and how they affect the democratic process's integrity. By doing this, the country's democratic ethos will be strengthened and durable electoral changes will be shaped. It will also help to build and enhance the electoral process, credible elections, and voter participation.
- Furthermore, there is a need for increased voter education and sensitization efforts, or raising public understanding of citizens' rights and obligations in relation to the election malpractices. To improve the integrity of the electoral process, voters, governments, NGOs, CSOs, EMB, and other important stakeholders should intensify and lead initiatives pertaining to credible elections and clear electoral laws.

- It is also crucial to emphasize that free and fair elections can result from excellent governance, since voters will support parties that have clearly given them the benefits of democracy and will not allow votes to be stolen by keeping an eye on the ballots. However, voters grow apathetic about elections and the way they are run if there is weak leadership and government.
- EMDs and other important electoral stakeholders must actively prohibit and minimize vote buying and money politics in the nation. Adherence to strict expenditure caps during election campaigns is vital, and Nigeria's economy needs to be realigned to enable the populace on an economic level. This is so that voters in areas with low levels of poverty can choose trustworthy candidates on their own, as opposed to selecting the least qualified candidate who specializes in raising money. That any other laws passed in the country that deal with identifying the real winners of elections should be superseded by the provisions of the Constitution and the Electoral Acts. It should be discouraged immediately when elections are deemed to be inconclusive based on INEC standards.
- When it comes to election-related matters, the INEC should always remain impartial. They shouldn't convey through their body language that they are associated with any certain party, whether it be powerful or not. In the course of their responsibilities, they ought to make every effort to act as an impartial referee.
- As essential legal documents having supreme authority over matters of national significance, the Grundnorm and the Electoral Acts should be aligned with the revisions made to the INEC guideline.

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The impact of Value-Added Tax on unemployment in Nigeria

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Abstract

Since the Finance Act 2020 became effective, there have been scholarly debates regarding the impact of the hike in the value-added tax (VAT) rate from 5% to 7.5% on the general economy of Nigeria. One of the macroeconomic variables that often features in academic discussions is unemployment. Therefore, this study was aimed at examining the impact of the new VAT regime on the situation of unemployment in Nigeria. Autoregressive distributed lag (ARDL) framework was employed in the analysis. Thus, unemployment rate is the dynamic dependent variable while VAT revenue is the dynamic regressor. For robustness purposes, inflation rate and manufacturing output, which are commonly-discussed drivers of unemployment, are included as the control variables. Data on the macro variables were sourced from the World Bank's World Development Indicators, Central Bank of Nigeria's Statistical Bulletins and the Federal Inland Revenue Service's Financial Reports. The data covered the period 1994–2021. Empirical findings revealed that the VAT revenues have a positive relationship with the unemployment rate, suggesting that the hike in VAT rate might have a contractionary impact on employment. Furthermore, the unemployment and inflation appear to have positive relationship over the long run. The proposition of Phillips curve is therefore rejected using data sourced from the Nigerian economy.

Introduction

When the federal government of Nigeria increased the value-added tax (VAT) rate from 5% to 7.5% in 2020, there were nation-wide commentaries and debates about the consequences of the new tax regime. The Nigerian economy was predicted to contract when the proposal of the VAT hike was announced (Awoyinfa et al., 2019). Thus, the new tax structure has renewed the interest of researchers (such as Odu, 2022; Omodero & Eriabie, 2022) to investigate the impact of the VAT systems on macroeconomic variables in Nigeria. This study joins the stream of literature uncovering whether the predicted consequences of VAT actually happen on the levels and changes in unemployment numbers in the country.

It is noteworthy that, before the VAT increase, the annual VAT revenue targets in Nigeria were hardly met (Omodero & Eriabie, 2022). However, since 2020, the Federal Inland Revenue Service (FIRS) has repeatedly stated that it exceeds its annual target of VAT revenues. For example, in 2021, the FIRS reported N2.07 trillion as total VAT receipts against the target of N1.84 trillion included in the 2021 budget (Oyekanmi, 2022). This has generated comments applauding the government's decision on the VAT increase (Oyekanmi, 2022; Omodero & Eriabie, 2022).

Nevertheless, following the official introduction of the new VAT rate in 2020, the Nigerian economy experienced a recession which lasted for two quarters – the unemployment situation was also bleak during the period. This consequence follows the prediction in the economic literature that tax hikes are contractionary. Although the 2020 recession coincided with the Covid-19 pandemic which induced recessions in many advanced economies, it is somewhat difficult to determine whether the 2020 economic contraction in Nigeria was caused entirely by the pandemic or in part by the new VAT structure.

The mechanism of VAT was explained by Omodero & Eriabie (2022) who investigated the relationship between VAT proceeds and the unemployment rate. The paper argued that increasing VAT correlates with decreased industrial performance. This is so because, following the acceleration principle, industrial growth is hinged on consumer demand. So if the consumption expenditure had been dragged by elevated VAT rate, production experiences an equivalent slowdown. In consequence, fall in industrial output implies lower demand for labour and hence more unemployment is triggered. By a similar argument, Egunjobi (2021) stated that higher unemployment always coincides with high poverty.

Tax hikes have also been linked with inflation. Afolayan et al. (2021) noted that Nigerian companies treat their VAT expenses as input costs and pass them to the consumers in the form of higher prices. Even before the VAT rate was increased in 2020, Ikpe & Nteegah (2013) had argued that increased VAT revenues in Nigeria had inflationary effects. Furthermore, Nigeria's infrastructure is of poor quality by any standard and this constrains the smooth running of businesses. In the outcome of a survey, manufacturing companies in Nigeria ranked infrastructure as their most severe business constraint (Igbaekemen, 2014). In a country where basic physical infrastructure to strengthen competitiveness and expand productive capacity is lacking, an increase in VAT creates a pass-through effect on consumer prices (Igbaekemen, 2014). It is on this

basis that inflation rate and manufacturing performance are included as control variables in the analysis of the unemployment-VAT nexus in this study.

Unemployment – VAT Nexus: A literature review

Conceptual review: Meaning of VAT

According to Bickely (1996), VAT is a tax levied at each stage of production on the first value added. Oldman & Woods (1996) considered VAT as a multi-stage consumption tax levied on the difference between a firm's sales and the value of its purchased inputs used in producing goods. Earlier, in the Statement of Standard Accounting Practice (1993), VAT was defined as a tax on the supply of goods and services, which is eventually borne by the final consumer but collected at each stage of the production and distribution chain (SSAP, 1993). From these definitions, it is evident that the classical VAT is a multi-stage consumption tax whose incidence is majorly on the final consumers. Nigeria also adopted VAT in 1993 (Ogundeke, 1996). Many other countries have come to replace sales tax with VAT for certain reasons. VAT is more comprehensive and well equipped to ensure voluntary compliance for its multi-stage collection and credit mechanism through the use of invoices (Ogundeke, 1996).

Meaning of unemployment

Unemployment is the situation whereby people looking for a job could not get a job (Keynes, 1936; Hicks, 1937). It is a condition that describes people who are active in the labour market but are jobless. It is noteworthy that the unemployment rate is not a fraction of the overall population or a fraction of the working-age population. Rather it is a fraction of the labour force. It applies only to people who are actively searching for jobs but do not have jobs. Of the types of unemployment, cyclical unemployment is what generates a lot of concerns for economists and policy-makers (Keynes, 1936). Demand-deficient unemployment has effects that can negatively affect composition and prosperity of the economy. When cyclical unemployment occurs, the economy stalls as the GDP falls and there are pressures of recessionary trends (Keynes, 1936). As a result, cyclical unemployment causes serious debates and analysis among economists. And the government is very concerned when cyclical unemployment occurs.

Theoretical statement

Ricardian Equivalence Theorem

One of the prominent theories on taxation is the Ricardian Equivalence Theorem. The theorem holds the tenet that if taxes are non-distortionary, the mix of tax and debt financing of government purchases is irrelevant in the sense that there is no impact on the equilibrium sequence of key real variables (Evans et al., 2010). The theorem is easily understood in the context of the "Ramsey model" in which infinitely-lived representative agents solve dynamic optimization problems and have

rational expectations about the future course of the economy. The extension by Barro (1974) to an overlapping-generations model with finitely-lived agents, who make bequests to their children, showed that Ricardian equivalence holds more generally than one might think. At the same time, it is widely understood that Ricardian equivalence does not generally hold if agents are not dynamic optimizers, households are liquidity constrained, taxes are distortionary, or government spending is not exogenous to financing (Evans & Honkapohja, 2003). According to recent revisions by Hayo & Neumeier (2016), the Ricardian equivalence theorem suggests that fiscal stimulus, which may be public spending hikes or tax cuts, will lead to a crowding out of private consumption, thus decreasing the effectiveness of fiscal policy in boosting employment and economic activity. Similarly, tax hikes might increase private consumption, culminating in economic growth and positive trends in other macro variables including employment. On this basis, governments justify their stances to pursue contractionary fiscal policy, hoping that the effect would ultimately be expansionary (Ikiz, 2020; Parker et al., 2013). Although studies showing the effectiveness of fiscal policy may cast doubt on Ricardian equivalence theorem's validity, they provide only indirect evidence of the theorem's usefulness for linking tax hikes with lower unemployment (Hayo & Uhl, 2014).

Laffer Curve Theorem

On the other hand, the Laffer Curve Theorem is adopted in this study to contextualize the doctrine that tax hikes may have expansionary effects on government revenues and overall economic performance. Arthur Laffer's seminal discussion of the relation between tax revenues and the tax rate was an analytical cornerstone of the supply-side economics revolution during the early 1980s (Canto et al., 1982). The conjecture that if tax rates were reduced, tax revenues would increase has become a powerful, suggestive policy stand.

The surprising policy implication was that public funds could be increased without burdening the private sector by adverse incentive effects or redistributive measures (Buchanan & Lee, 1982). The Laffer relation provided an important theoretical ingredient for the formulation of a convincing hypothesis about the behavior of the government in the guise of a revenue-maximizing bureaucracy. It was as early as 1982 when Buchanan and Lee used the Laffer relation to analyze the behavior of political agents and derived the conditions for political equilibrium (Buchanan & Lee, 1982).

Figure 1 describes a typical Laffer curve where the variable on the horizontal axis denotes the tax rate and the variable on the vertical axis is the tax revenues. The tax revenue is clearly zero if the tax rate as a multiplying factor is zero. If the tax rate is equal to one, one might expect that the return from supplying labor services is zero. The consequence will be that economic agents withdraw from market activities and possibly concentrate on rest and leisure. Thus, the two crossings along the horizontal are intuitively established. Tax revenues are the product of the tax rate, t , and the tax base, x , written as a function of the tax rate (see Figure 1). If we assume that the tax base is a decreasing function of the tax rate, the simple Laffer curve seems to predict that tax rate cannot increase indefinitely, otherwise the tax revenues would fall. Thus, ultra-high taxes discourage workers' efforts and contribute to higher unemployment.

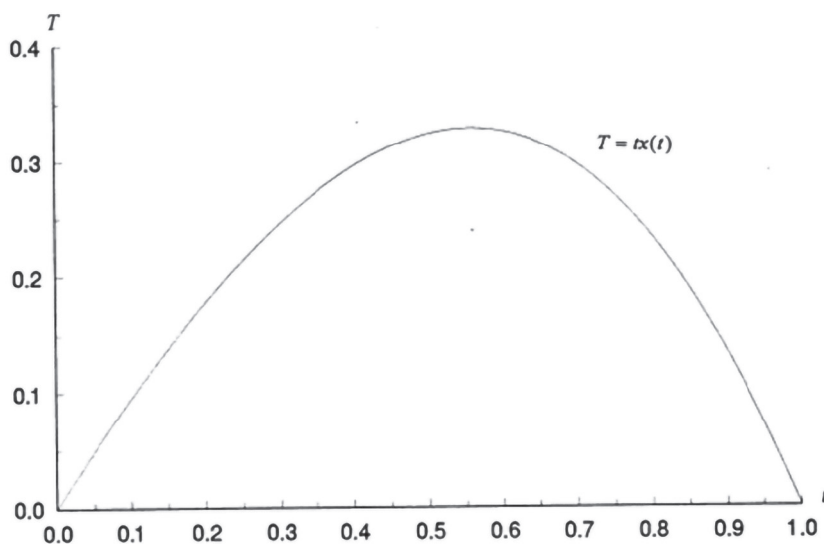


Figure 1. Laffer Curve

Source: owns study.

Empirical review

Eiya and Osazuwa (2017) used a quantitative approach to investigate the impact of VAT systems on unemployment in Nigeria. The paper adopted the augmented Dickey-Fuller test to measure the stationarity properties of the data. Also, the Johansen co-integration methodology was used in testing the co-integration properties of the data and the fully modified OLS was used to estimate the regression specification. The data on VAT revenues and unemployment spanned 1984–2014. The study found VAT and customs and excise duties as positively related to unemployment in Nigeria. The study recommended that taxes collected be judiciously used to provide infrastructure that will attract employment.

While Eiya & Osazuwa (2017)'s research was expository of the negative effect of VAT on employment, the transmission mechanism by which the impact manifests was ignored in the paper. To fill this void, Afolayan et al. (2021) analyzed that an increase in VAT adds to production costs of manufacturing firms. These firms are propelled to increase their output prices, which in turn depress the consumer demand. In effect, there is less demand for labour and hence unemployment becomes rife in the country.

Also, Anichebe (2019) found a positive relationship between VAT and unemployment. Using OLS to estimate data on variants of indirect tax and unemployment in Nigeria, Anichebe (2019) pushed the narrative that an increase in VAT discourages production. And this leads to distortions in the labour market. The study therefore recommended that the unemployment impact of VAT increase should be mitigated by building sustainable infrastructure for the taxpayers.

In another vein, Alabi et al. (2019) traced the effects of government policy on taxation on the performance of Small and Medium Enterprises (SMEs) in South-west Nigeria. The study adopted a descriptive ex-post facto design and involved both primary and secondary data. Stratified sampling technique was used to select the sample. Alabi et al. (2019) found a significant relationship between government policy and business growth of SMEs in South-west Nigeria. Specifically, hikes in taxes and other levies paid by the SMEs are counterproductive. The thematic analysis of the primary data showed that demanding more taxes from SMEs sends many of their owners/managers out of business. This adds to the unemployment count in Nigeria.

More recently, Ezejiolor & Ezekwesili (2022) analyzed the consequences of increased tax revenues in Nigeria on the jobless rate. The study concluded that tax revenue has a significant effect on the unemployment rate of Nigeria at the 5% level of significance. This implies that the increase in tax revenue automatically leads to an increase in the unemployment rate. As a result, Ezejiolor & Ezekwesili (2022) recommended that the government should identify and close any administrative loopholes in order to optimize the contribution of customs and excise duties to economic development. It follows that if tax receipts are ploughed back into the economy, the negative impact of increased VAT revenues on unemployment can be avoided. Osa (2014) noted that if the VAT revenues are plagued with corrupt practices from the government, the taxpayers would have no choice but to resort to tax avoidance and evasion.

Gap in knowledge

The available evidence from the developed countries indicated that the pass-through effects of VAT on consumer prices is not significant, especially in the United States. The effects are rather marginal in Europe. The reason for such development is that the tax structures in the developed countries are more related to incomes and assets, rather than goods and services. However, in Nigeria and other developing countries, the VAT systems are more skewed towards goods and services than items of incomes. This has made VAT reforms to generate notable impact in the developing countries. Nevertheless, the empirical literature on the impact of VAT on macroeconomic variables has hardly included unemployment in a given model. This study has therefore closed this knowledge gap as it analyzed the particular impact of the Nigeria's VAT structure on the situation of unemployment in the country.

Methodology

Model specification

This study employed the ARDL methodology in the estimation procedure. This analytical approach enabled the researcher to measure the variations around the unemployment rate as might be impacted by the value-added tax. While the value-added tax is the core regressor in the ARDL framework, the inflation rate and manufacturing output are included as control variables because they have both theoretical and empirical links with the unemployment rate. The model is therefore developed as follows.

$$UNE = f(VAT, INF, MNO) \dots\dots (1)$$

Where UNE is the unemployment rate, VAT is the value-added tax, INF is the inflation rate and MNO is the manufacturing output. Equation (1) closely follows Acosta-Ormaechea & Morozumi (2019) who argued that the design of the VAT system has an economy-wide impact on output and employment. Also, on the theoretical front, VAT rates are distortionary on manufacturing performance and consumption patterns (Otemu, 2020). Furthermore, the inflation-unemployment nexus is popularly explained by the propositions of the Phillips curve which is well grounded in the macroeconomic literature.

In econometric terms and within the auspices of the ARDL technique, we specify the short- and long-run relationships among the variables in Equation 2. The insights for the inclusion of the macroeconomic variables are derived from the empirical works of Ajide (2013).

$$UNE_t = \alpha_1 VAT_{t-1} + \alpha_2 INF_{t-1} + \alpha_3 MNO_{t-1} + \sum_{i=1}^p \beta_i \Delta UNE_{t-i} + \sum_{i=1}^q \phi_i \Delta VAT_{t-i} + \sum_{i=1}^r \theta_i \Delta INF_{t-i} + \sum_{i=1}^s \pi_i \Delta MNO_{t-i} + e_t \dots\dots (2)$$

Where α_1 , α_2 and α_3 are long-run coefficients, β s, ϕ s, θ s and π s are short-run coefficients, p , q , r and s are all optimal lags on the first-differenced variables. The lags are selected by Schwarz Information Criterion (SIC). Δ is a notation for change. e is a stochastic error term distributed with a constant mean and zero variance. All the variables are in log form.

Data issues and sources

The time series data of the four variables (unemployment, VAT, inflation, and manufacturing output) are used for data analysis in this study. The current VAT rate in Nigeria is fixed at 7.5%, so it is not a variable. There have only been two VAT rates (5% before and 7.5% after February 2020) since its general introduction in 1994. Therefore, the VAT revenues, which are collected and reported by the Federal Inland Revenue Service (FIRS) are used in the present study. As the revenues change, it is expected that there are changes in the unemployment rate. The inflation rate in Nigeria, which is measured by the consumer price index, is computed and published by the National Bureau of Statistics. The unemployment rate is published by the NBS, but this is done every two or three years – the latest unemployment figures were released in 2020. Due to irregular NBS reports, data on unemployment rates were collected as published by the World Bank's World Development Indicators (WDI). Data on manufacturing output is also sourced from the WDI where it is reported in billions of dollars. To achieve time consistencies in the data, they are all annualized. The data cover the period 1994–2021.

Estimation technique

The implementation of the ARDL approach involves two stages. First, the existence of the long-run nexus (cointegration) between the variables under investigation is tested by computing the F-statistics of bounds tests for analyzing the significance of the lagged levels of the variables. Pesaran et al. (2001) have provided two sets of appropriate critical values for different numbers of regressors (variables). One set assumes that all the variables in the ARDL model are

I (0), and another assumes that all the variables are I(1). If the F-statistic lies above the upper-bound critical value for a given significance level, the conclusion is that there is a non-spurious long-run level relationship with the dependent variable. If the F-statistic lies below the lower bound critical value, the conclusion is that there is no long-run level relationship with the dependent variable. And if it lies between the lower and the upper limits, the result is inconclusive (Pesaran et al., 2001). Second, if the cointegration between variables is identified, then one can undertake further analysis of the long-run and short-run (error correction) relationship between the variables. This is done under the nomenclature of the error correction modelling. The ECM representation of the series is given as:

$$\Delta \text{UNE}_t = \alpha_0 + \sum_{i=1}^p \beta_i \Delta \text{UNE}_{t-1} + \sum_{i=1}^q \phi_i \Delta \text{VAT}_{t-1} + \sum_{i=1}^r \theta_i \Delta \text{INF}_{t-1} + \sum_{i=1}^s \pi_i \Delta \text{MNO}_{t-1} + \xi \text{ECM}_{t-1} + e_t \dots (3)$$

Where ξ is the speed of adjustment coefficient, measuring how much deviation from the long-run will be restored within the time period (in this case one year). ξ is expected to be negative and statistically significant to support the cointegrating relationship. While Equation 2 includes both long- and short-run dynamics of the variables in a single model, Equation 3 contains only the short-run representation and a component to measure the deviation of the short run from the long run form. This study estimates Equation 3 to follow contemporary studies of Adeyemi & Olufemi (2016) and Ayanwale (2013). All other variables are as defined previously.

Empirical analysis

Descriptive analysis of variables

Table 1 presents the first moments and second moments of descriptive statistics of the variables. It is revealing that the average unemployment rate is 4.14%. This may be immediately shocking to the reader, so it may be sufficient to state that the unemployment data used in this study were modelled after the International Labour Organisation (ILO)'s estimates, not the locally-estimated figures by the National Bureau of Statistics (NBS). This may further be justified, given the recent proposal of the NBS to align the data measurements of the unemployment computations with the ILO methodology. Moreover, the NBS-based data are very scanty: there are only four data points in the data period (1994–2021). It follows that only the ILO-modelled data can currently provide the comprehensive, reliable unemployment data in Nigeria. Hence, they were used for the data analysis in this study.

The minimum and maximum unemployment figures (3.7% and 6%, respectively) are close to the mean value, indicating a low spread in the series of unemployment. This is better explained by the standard deviation (0.64) which is significantly lower than the mean value. The skewness (1.92) shows that the series has a number of increasing positive values and kurtosis (2.52) suggests very few outliers in the series. The Jarque-Bera statistic (24.5) represents a normal distribution of the unemployment series.

Table 1. Descriptive statistics of variables

	Unemployment Rate (%)	VAT Revenues (₦' billion)	Inflation Rate (%)	Manufacturing Output (\$' billion)
Mean	4.14	395.22	16.28	2.29E+10
Maximum	6.00	1605.17	72.84	6.44E+10
Minimum	3.70	8.34	5.39	5.10E+09
Standard deviation	0.64	404.24	14.71	1.58E+10
Skewness	1.92	1.23	2.90	0.96
Kurtosis	5.51	4.11	10.73	3.88
Jarque-Bera statistic	24.50	8.56	108.89	89.04
Jarque-Bera prob	0.00	0.01	0.00	0.01

Source: Authors' computation.

The average value of VAT revenues over the sample period (1994-2021) is ₦395.22bn. This mean value is much distant from the maximum and minimum values of VAT, which are about ₦1.61tr and ₦8.34bn, respectively. It follows that the series of VAT revenues are characterized by many outliers. This is not particularly shocking because the experience of publishing the VAT revenues that were above the projected figures is a recent phenomenon in Nigeria. In fact, prior to the enactment of the Finance Act 2020 which increased the VAT rate from 5% to 7.5%, the FIRS hardly reported annual VAT revenues that shot above the budgeted figures at the beginning of each year.

The standard deviation of the VAT revenues (₦404.24bn) is above the mean value, indicating that the VAT receipts are very volatile: they change markedly each year. Turning to the second moment statistics, the skewness of the VAT distribution is positive at 1.23. This means the distribution has a long right tail, suggesting the VAT revenues have been experiencing upward trend since 1994. Given the threshold of 3, the kurtosis of 4.11 implies that the VAT series are leptokurtic, meaning they are fat-tailed with many outliers. The Jarque-Bera statistic (8.56) shows that the VAT series are normally distributed with a 5% level ($p < 0.05$). The behaviour of VAT revenues on the second moment statistics has a similar rhetoric as that of manufacturing output. However, they are different in that the standard deviation (\$15.8b) is relatively not much distant from the mean manufacturing output (\$22.9b).

The average inflation rate is 16.28%. This shows the CBN is far from achieving its long-term objective of single-digit inflation. It also shows Nigeria deviates from the group of countries experiencing a high inflation spiral. Nevertheless, unlike other major central banks in Europe and America which have an inflation target of 2%, the Central Bank of Nigeria has consistently excused itself from pursuing a low inflation regime. The mean inflation rate is much further from the maximum value (72.84%) than the minimum value (5.39%), suggesting that price growth has been steady in Nigeria. It also implies that Nigeria did not experience any episode of hyperinflation over the sample period.

The steady increases in price levels are projected further by the standard deviation of the inflation series (14.71%) which is less than the mean figure. While this may sound counterintuitive, inflation rates in Nigeria are less volatile compared to other high-frequency macroeconomic variables. The skewness figure (2.89) reinforces the assertion that the inflation series have a long right tail, with many positive values indicating an increasing trend. Although most of the inflation figures are close to each other, the kurtosis is very large (10.73), demonstrating that the series of inflation has many outliers: there are notable years of price shocks over the sample period. The inflation series are normally distributed, as indicated by the Jarque-Bera statistic (108.89).

Correlation analysis

According to Table 2, the association between VAT revenues and unemployment is high and positive at 0.85. This demonstrates a contractionary structure of Nigeria's tax system. Traditionally, higher taxes are distortionary on the production of goods and services. Taxes are also considered as a leakage in the standard macroeconomic analysis. Hence, higher tax rates or revenues discourage consumption and production and lead to higher unemployment. Before the Finance Act 2020 was signed by former President Buhari into law, the employment effect of the increased VAT rate was commonplace in the socio-economic discussions in Nigeria. Yet, since 2020, the Federal Inland Revenue Service has been proud to announce over-the-target VAT revenues at the expense of growing unemployment in the country.

Table 2. Correlation coefficients of the variables

	UNE	VAT	INF	MNO
UNE	1.00			
VAT	0.85	1.00		
INF	-0.02	-0.23	1.00	
MNO	0.68	0.93	-0.32	1.00

Source: Author's computations.

The correlation coefficient between VAT revenues and inflation is negatively low at -0.23. This is counterintuitive. Higher prices of consumer goods reduce the household consumption expenditure on such goods. This reduces the VAT paid by the consumers, hence lower VAT receipts. In another argument, inflation erodes the value of money, creating a disincentive for the households to purchase more goods and pay more taxes. VAT is a consumption tax, implying that lower consumption generates lower VAT proceeds. The relationship between inflation and unemployment is negatively weak at -0.02. While this follows the Phillips curve hypothesis, the responsiveness of unemployment to the inflation rate is fairly inelastic. This suggests that labour employment does not adjust immediately to changes in the inflation rates in Nigeria. In other words, unemployment rates might be unchanged in periods of fluctuating inflation rates. Finally, manufacturing output is positively related with unemployment (0.68) and VAT (0.93), but negatively related with inflation (-0.32).

Unit root analysis

To avoid the possibility of spurious regression, the unit root test is required (Choi, 2015). This is important because a spurious regression implies that the estimates cannot be conclusively determined to be unbiased, consistent efficient (Choi, 2015). To this end, a unit root test was conducted in this study. To provide a robust discussion, two popular measures were used: the augmented Dickey-Fuller (ADF) and Phillips-Perron (PP) tests. In principle, the stationarity test determines whether the series have a constant mean, constant variance and constant co-variance. Nevertheless, series with a constant mean almost always have a constant variance and constant co-variance, making the constancy of the mean to be a sufficient requirement (Kim & Choi, 2017). To provide consistency in the measurements, the variables were logged before the unit root tests were conducted on them. Following the computations of the ADF and PP statistics (see Table 3), they were compared with the given critical values in order to make a decision. Where the statistics are greater than the critical value, it was concluded that the series were stationary. If the converse was the case, it was concluded that the series were non-stationary. Hence, three of the series for the variables (UNE, VAT and INF) over the sample period were non-stationary at levels, but stationary at first differences. On the other hand, the series for MNO were stationary at levels. This satisfies the necessary condition for the use of ARDL as the analytical technique in this study – as the technique requires a mixture of orders of integration among the variables.

Table 3. ADF and PP unit root test results

Variables	Form of test	Constant		Constant and Linear Trend		Order of Integration
		Levels	First Differences	Levels	First Differences	
UNE	ADF	-0.0567	-6.5550	-2.5982	-6.4567	I(1)
	PP	-0.4401	-7.4511	-2.4567	-7.6590	I(1)
VAT	ADF	-0.8233	-7.2471	-1.3054	-7.7890	I(1)
	PP	-0.7723	-7.9451	-1.5982	-7.9835	I(1)
INF	ADF	-1.1037	-6.2578	-1.3881	-6.3456	I(1)
	PP	-1.3011	-6.4561	-1.8821	-6.3450	I(1)
MNO	ADF	-4.2315	-8.5489	-5.4321	-8.7654	I(0)
	PP	-4.8994	-9.0981	-5.6556	-8.0871	I(0)
Asymptotic Critical Values:						
1%	ADF	-3.6463	-3.6463	-4.2528	-4.2627	
	PP	-3.6394	-3.6463	-4.2529	-4.2627	
5%	ADF	-2.9540	-2.9540	-3.5485	-3.5530	
	PP	-2.9511	-2.9540	-3.5485	-3.5530	
10%	ADF	-2.6158	-2.6158	-3.2071	-3.2096	
	PP	-2.6143	-2.6158	-3.2071	-3.2096	

Source: Authors' computations.

Bounds test

Before exploring the long run dynamics of the model, it is important to determine whether these variables co-move over the long run. This is achieved by conducting a bounds test. The cointegration properties revealed by the bounds testing also show the empirical relevance of the short-run dynamics of the series. As Table 4 indicates, the computed bounds F -statistic (7.76) is above both the lower and upper limits of the critical values at 10%, 5% and 1%. It follows that both short- and long-run relationships among the unemployment rate, VAT revenues, inflation rate and manufacturing output can be determined empirically, and inferences can be made from them.

Table 4. Bounds test for cointegration

Computed F -statistic: 7.76 (lag structure, $k = 3$)
Critical bound's value at 10% - Lower: 3.17 ; Upper: 4.14 Critical bound's value at 5% - Lower: 3.79 ; Upper: 4.85 Critical bound's value at 1% - Lower: 4.41 ; Upper: 5.82
(Three regressors and no trends in the model) Critical values for the bound tests are due to Narayan (2005)

Source: Authors' computations.

ARDL estimates

The short-run estimates (Table 5) show that the unemployment rate in Nigeria is indeed introgressive because its value in the previous years positively influence its values in the current year. In specific terms, a rise in the unemployment rate in the past year has a 43% chance of increasing the unemployment in the current year. A similar rise in the past two years has a higher change of 58%. The VAT revenues have a positive impact on the unemployment rate. When the government increases VAT revenues in the current year, there is a negligible impact on unemployment. Nevertheless, similar increase in the past year might increase the unemployment rate by 20% in the current year. The same increase in the past two years would increase the current-year unemployment rate by 10%. It follows that there exists a time lag of the impact of VAT receipts on the unemployment rate. This finding is well grounded in the economic literature of the tax-employment nexus. Indirect taxes discourage consumption spending which may crowd out domestic investment in goods and services. As a result, higher VAT revenues imply less employment and thus more unemployment.

Table 5. Short-run estimates

	Coefficient	T-statistic
Δ UNE (-1)	0.43*	7.43
Δ UNE (-2)	0.58**	3.88
Δ VAT	5.71E-05**	2.05

Δ VAT (-1)	0.2***	-1.33
Δ VAT (-2)	0.1***	1.67
Δ INF	0.03**	-1.98
Δ INF (-1)	0.01*	-8.25
Δ MNO	-3.48E-13**	3.57
ECM (-1)	-0.56*	-5.29
R ² = 0.769;	F-stat = 3.94*	F-stat prob (0.01)

Source: Authors' computations.

Notes: The table reports ARDL (2, 2, 1, 0). Dependent variable is UNE. All variables are in log form. The lags were selected based on Schwarz Bayesian Criterion.

* indicates significance at 5%; ** indicates significance at 10%; *** indicates no significance.

However, this study was unable to uphold the Phillips curve proposition. Contrary to the negative correlation reported between inflation and unemployment, the short-run estimates symbolise that the two variables are positively related – increases in the inflation rate are associated with increases in unemployment. Particularly, a 1% rise in the inflation rate in the current year leads to a 3% increase in the unemployment rate in the same year while a 1% increase in the inflation rate in the past year is connected with a 1% increase in the unemployment rate in the current year. This result is empirically underpinned in Nigeria. For example, when the NBS published the labour market and price statistics in 2021Q4, the unemployment rate increased from 27.1% to 33.3% and the inflation rate increased from 21.79% to 22.95% (NBS, 2021). This was evidence of the rejection of the Phillips curve by Nigeria's macro data. Hence, it is probable that the Nigerian economy has been experiencing a scenario of hyperinflation: a simultaneous increase in inflation and unemployment. The regression estimates further indicate that higher manufacturing output leads to lower unemployment, though the responsiveness of unemployment to manufacturing output is fairly inelastic. This follows the logical relationship between output growth and employment. The manufacturing sector is a major custodian of economic activity, suggesting that higher output production necessarily imply higher employment of workers and thus lower unemployment in the economy. The speed of adjustment (0.56) interprets that about 56% deviation from the previous-year's long-run equilibrium will be corrected within one year. This error correction term is both negative and statistically significant at 5%. Turning to the diagnostic checks, the F-statistic (3.94) indicate that all the explanatory variables are jointly significant. The R-squared figures show that the regressors account for about 76.9% variation in unemployment. Over the long run, the VAT revenues remain to have contractionary impact on employment. And the sensitivity remains fairly inelastic (Table 6). Nevertheless, the elasticity of unemployment with rest to VAT revenues is insignificant, suggesting that the fluctuations around VAT revenues cannot reliably indicate changes in the labour market. In standard labour market analysis, indirect taxes are distortionary on output and employment, making them unsuitable mechanism of heralding booms on employment. Furthermore, the unemployment and inflation appear to have positive relationship over the long run. The proposition of Phillips curve

is therefore rejected using data sourced from the Nigerian economy. Finally, the manufacturing sector has the potentials to reduce the unemployment rates in Nigeria. However, the growth in the sector itself has been consistently sluggish. The R-squared value implies that the three variables jointly account for about 72.3% in the variation of unemployment over the long run. The F-statistic (5.28) shows that the variables are all jointly significant to register long-term changes in the unemployment figures.

Table 6. Long-run estimates

	Coefficient	Tstatistic
VAT	-0.0023***	-2.54
INF	0.067**	4.61
MNO	-1.34E-10*	4.66
R ² = 0.723	F-stat = 5.28*	F-stat prob (0.02)

Source: Authors' computations.

Conclusion and recommendations

The exploration of the macroeconomic repercussions of Nigeria's current VAT regime remains insufficient in existing literature. This study, employing ARDL as the analytical method, contributes novel insights into the influence of Nigeria's VAT structure on the country's unemployment rate. In ensuring the robustness of our approach, control variables encompass inflation and manufacturing output.

Key revelations unfold as the study progresses. Unemployment rates in Nigeria exhibit an autoregressive nature, indicating that past levels significantly foreshadow future rates. Notably, VAT and unemployment showcase a positive relationship in both short and long-term scenarios, signifying that VAT revenues exert a contractionary impact on employment. Despite the federal government allocating a portion of VAT receipts to empower unemployed youths, these programs have proven inconsequential in the battle against unemployment. The inadequacy of these initiatives, coupled with intermittent and whimsical funding, undermines their effectiveness. However, a beacon of hope emerges in the form of a potential reduction in unemployment through a fortified manufacturing sector.

Recommendations arise from these findings. Firstly, we propose redirecting VAT receipts toward sustainable unemployment-reducing programs. The government should cease allocating VAT revenues to programs lacking economic value and prioritize initiatives that enhance production, channeling VAT injections into poverty-alleviating schemes.

Furthermore, we call upon Nigerian policymakers, encompassing the federal government and the CBN, to synchronize fiscal and monetary policies. For instance, in response to a government-driven VAT increase, the CBN should have lowered, not heightened, the monetary policy rate. This strategic realignment would counterbalance the potential negative impact of VAT hikes on employment by reducing borrowing costs. The opportunity to rectify this apparent policy misstep remains, and corrective action is encouraged.

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Wielopoziomowa współpraca w regionie Morza Bałtyckiego podczas pandemii COVID-19

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Słowa kluczowe współpraca międzyregionalna, Morze Bałtyckie, COVID-19, BSSSC, CBSS, UBC, SU-ERMB

Abstrakt Pandemia COVID-19 przyczyniła się do zmian w sposobie funkcjonowania społeczeństw i podmiotów w regionie Morza Bałtyckiego. W artykule przeanalizowano nowe rozwiązania dotyczące współpracy w regionie Morza Bałtyckiego, na podstawie działania trzech organizacji bałtyckich: Rady Państw Morza Bałtyckiego (Council of the Baltic Sea States, CBSS), Związek Miast Bałtyckich (Union of the *Baltic* Cities, UBC) oraz Konferencji Współpracy Subregionalnej Państw Morza Bałtyckiego (Baltic Sea States Subregional Cooperation, BSSSC), a także ich współpracę przy realizacji Strategii Unii Europejskiej dla regionu Morza Bałtyckiego (SUERMB). Zwrócono uwagę na to, w jaki sposób przebiegała bałtycka współpraca regionalna podczas pandemii oraz czy zmieniła się jej dynamika. Postawiono następującą hipotezę: Współpraca w regionie Morza Bałtyckiego uległa przeobrażeniom podczas pandemii COVID-19. Do badania wykorzystano analizę danych zastanych, głównie dokumentów źródłowych, zapisów webinarów i spotkań online oraz stron internetowych i mediów społecznościowych poszczególnych organizacji. Przeprowadzona analiza wykazała trwałe oraz tymczasowe zmiany we współpracy bałtyckiej, które miały swój początek podczas pandemii COVID-19.

Multilevel cooperation in the Baltic Sea Region during the COVID-19 pandemic

Keywords regional cooperation, Baltic Sea, COVID-19, BSSSC, CBSS, UBC, EUSBSR

Abstract The COVID-19 pandemic has had an impact on the functioning of societies and entities in the Baltic Sea Region. The aim of the article is to analyze the changes caused by the COVID-19 pandemic in interregional cooperation in the Baltic Sea Region. It was carried out on the basis of three Baltic organizations, i.e. the Council of the Baltic Sea States, (CBSS), Union of the Baltic Cities, (UBC), Baltic Sea States Subregional Cooperation, (BSSSC), as well as cooperation on the European Union Strategy for the Region The Baltic Sea (UESBSR). The study considered whether and how Baltic regional cooperation took place during the pandemic, and whether the dynamics of interregional cooperation had changed. The following hypothesis was put forward: Interregional cooperation in the Baltic Sea Region changed during the COVID-19 pandemic. The study used the analysis of existing data,

mainly source documents, records of webinars and online meetings, as well as websites and social media of individual organizations. The conducted analysis showed permanent and temporary changes in the Baltic cooperation that began during the COVID-19 pandemic.

Wprowadzenie

Pandemia COVID-19 wywołała zmiany w funkcjonowaniu całych społeczeństw, paraliż dotyczył sfery prywatnej, politycznej i zawodowej – trudno wskazać taką dziedzinę życia, w której nie doszło w związku z tym do reorientacji działań. Problemy te nie ominęły również regionu Morza Bałtyckiego. W poniższym artykule skupiono się na funkcjonowaniu organizacji bałtyckich i ich współpracy podczas pandemii COVID-19.

Współpraca wielopoziomowa w regionie Morza Bałtyckiego

Historia współpracy bałtyckiej jest niezwykle długa i bogata. Przykładów społecznej interakcji można doszukiwać się już od momentu powstawania osadnictwa na tym terenie (Rossa-Kilian, 2009, s. 96–107). Z uwagi na przedmiot niniejszej analizy skupiono się na współpracy i integracji, która rozwinęła się w XX wieku. Czynnikiem, który miał niewątpliwy wpływ na rozwój współpracy w RMB był rozpad ZSSR, powstały wówczas organizacje (początek lat 90.), które współpracują i działają na rzecz integracji bałtyckiej do dziś.

Podstawą współpracy w regionie Morza Bałtyckiego (RMB) są zagadnienia związane z bezpieczeństwem, ekonomią i środowiskiem. Została zainicjowana, aby chronić RMB, tworzyć polityczne ramy ochrony środowiska i warunki dla zrównoważonego rozwoju ekonomicznego (Scott, 2002, s. 135–136). Podmioty współpracy w RMB reprezentują poziom ponadnarodowy, rządowy, regionalny i lokalny. Zmiany spowodowane rozpadem Związku Radzieckiego czy rozszerzeniem UE (1995, 2004) sprawiły, że modyfikacji uległ poziom relacji, z dotychczasowej, głównie międzyrządowej, na zarządzanie wielopoziomowe (Kern, Löffelsend, 2004). W UE jest ono rozumiane jako integracja instytucji ponadnarodowych i międzyrządowych oraz określony stopień centralizacji i decentralizacji, w której najniższy stopień tworzą regiony i miasta, państwa narodowe i instytucje ponadnarodowe (Ruszkowski, 2010, s. 263).

Mimo że niektóre formy współpracy, takie jak HELCOM (Komisja Ochrony Środowiska Morskiego Bałtyku, 1974) działały już wcześniej, jednak zasięg poruszanej przez nie tematyki ograniczony był tylko do najważniejszej kwestii, czyli środowiska. W niniejszej analizie uwagę poświęcono trzem organizacjom reprezentującym różne poziomy współpracy: rządowy, regionalny i lokalny. Powstały na początku lat 90. i funkcjonują przy aktywnym udziale Unii Europejskiej, a ich działalność ma ściśle określone formaty współpracy.

Nie można analizować współpracy wielopoziomowej w RMB bez omówienia SUERMB, czyli pierwszej unijnej strategii makroregionalnej powstałej w 2009 roku. Jej filarami, według pierwotnego dokumentu w RMB, są następujące założenia: region zrównoważony ekologicznie, region dobrobytu, region dostępny i atrakcyjny, region bezpieczny (Szulc, 2019, s. 138). W 2019

roku SUERB obchodziła 10-lecie swojego funkcjonowania, dokonano jej podsumowania i zaplanowano kolejne działania związane z pogłębieniem współpracy w RMB.

Pierwszą z poddanych analizie organizacji była Rada Państw Morza Bałtyckiego (CBSS). Instytucja ta skupia wszystkie kraje UE, jak również państwa regionu Morza Bałtyckiego (także Norwegię i Rosję¹). Współpracuje z organizacjami regionalnymi, międzynarodowymi oraz państwami spoza regionu.

Powołana do życia w dniach 5–6 marca 1992 roku, w swoich działaniach koncentruje się na pomocy instytucjom demokratycznym, współpracy gospodarczej, ochronie środowiska i energetyki, kulturze, oświacie, turystyce i informacji, transporcie, komunikacji, ochronie zdrowia, sprawach socjalnych i bezpieczeństwie (Śmigierska-Belczak, 2012). CBSS ma określoną strukturę, a jej prace odbywają się podczas cyklicznych spotkań. Najwyższym Organem Rady ustanowiono Sesję Ministerialną, w której biorą udział ministrowie spraw zagranicznych państw członkowskich. Początkowo (do roku 2003) spotkania na najwyższym szczeblu odbywały się co roku, potem częstotliwość spotkań zmieniono i zdecydowano, że będą się odbywać co dwa lata². Między sesjami prace CBSS są koordynowane przez Komitet Wyższych Urzędników, na którego czele stoi przedstawiciel kraju przewodniczącego w danej chwili Radzie. Trzecim szczeblem organizacyjnym Rady są stałe Grupy Robocze do spraw: Współpracy Gospodarczej, Bezpieczeństwa Radiologicznego i Nuklearnego, Instytucji Demokratycznych, Współpracy w sprawach Dzieci, Młodzieży (Rossa-Kilian, 2009, s. 201–204).

Kolejną organizacją, która odgrywa istotne znaczenie w RMB, w tym przypadku na poziomie regionalnym, jest Konferencja Współpracy Subregionalnej Państw Morza Bałtyckiego (Baltic Sea States Subregional Cooperation, BSSSC). Partnerstwo w ramach BSSSC zainicjowano w miejscowości Stavanger (Norwegia) w 1993 roku. Tworzą ją władze regionalne państw położonych w RMB (Wilk, 1998, s. 17). W deklaracji założycielskiej stwierdzono, że poszerzenie współpracy o poziom regionalny jest sposobem utorowania dróg do nowych kontaktów i współpracy między władzami, instytucjami i przemysłem na poziomie subregionalnym oraz rozszerzenia istniejącej dwustronnej i wielostronnej współpracy. Stwierdzono wówczas, że nowy poziom kooperacji może promować stabilność i spójność regionu (Deklaracja, 1993).

Wśród celów działania BSSSC można wymienić:

- a) promowanie współpracy subregionalnej w takich dziedzinach jak: gospodarka, technologia, ochrona środowiska, polityka zdrowotna, sprawy socjalne, edukacja, szkolenia zawodowe, polityka ds. młodzieży, kultura, transport, telekomunikacja i informacja;
- b) formułowanie spójnej polityki bałtyckiej na szczeblu regionalnym;
- c) reprezentowanie interesów subregionów bałtyckich na szczeblu rządowym oraz w organizacjach europejskich i międzynarodowych (Szulc, 2014).

Do 2030 roku wyznaczono następujące priorytetowe obszary działań w ramach BSSSC: politykę spójności, kulturę i kreatywność, środowisko, klimat, energię, gospodarkę w obiegu

¹ Rosja została zawieszona ze względu na rozpoczęcie wojny na Ukrainie.

² 25 maja 2022 r. w Kristiansand (Norwegia) na pierwszej od dziesięciu lat Sesji Ministerialnej RPMB (<https://ies.lublin.pl/komentarze/decydujacy-rok-dla-wspolpracy-regionalnej-w-ramach-rady-panstw-morza-baltyckiego/>).

zamkniętym, zaangażowanie młodzieży, transport, politykę morską (BSSSC Strategy, 2030). Schemat organizacyjny BSSSC wygląda następująco: przewodniczący (wybierany na 2 letnią kadencję), rada, w skład której wchodzi po dwóch przedstawicieli z każdego państwa RMB, sekretariat (którego siedziba jest zmienna i zależy od osoby pełniącej funkcję przewodniczącego organizacji). Najważniejszym wydarzeniem w ciągu roku jest coroczna konferencja, która odbywa się jesienią w wybranym mieście (BSSSC).

Trzecią aktywnie działającą organizacją w RMB jest utworzony w 1991 roku w Gdańsku Związek Miast Bałtyckich (Union of the Baltic Cities – UBC). UBC działa na poziomie lokalnym, skupiając i integrując miasta RMB. Deklarację założycielską podpisały 32 miasta z 10 państw bałtyckich (Kern, Löffelsend, 2004), do roku 2005 ich liczba dynamicznie rosła, wówczas w organizacji było zrzeszonych już 109 miast. Po wstąpieniu Polski, Litwy, Łotwy i Estonii do UE, liczba członków stopniowo ulegała zmniejszeniu. Jako przyczynę takiego stanu wskazuje się m.in. większe możliwości nawiązania wzajemnych relacji poza organizacją (w 2010 r. do UBC należało 100 miast, natomiast w 2016 r. już tylko 87) (Radek, 2016, s. 83). Obecnie organizacja zrzesza 67 miast (UBC website), a jej działania koncentrują się na: zrównoważonym rozwoju, integracji regionu, bliższej więzi pomiędzy regionem bałtyckim i instytucjami Unii Europejskiej oraz na zagadnieniach społeczno-ekonomicznych: zapobieganiu przestępczości, bezpieczeństwie mieszkańców czy promowaniu wzrostu gospodarczego i stabilności w regionie (Dośpiał-Borysiak, 2006, s. 73). W UBC poszczególnymi zadaniami zajmują się następujące gremia: konferencja delegatów miast członkowskich, prezydent związku i zarząd. Zwyczajowo spotkania zarządu odbywają trzy razy do roku (Radek, 2016, s. 85).

COVID-19 w regionie Morza Bałtyckiego

31 grudnia 2019 roku Chiny poinformowały WHO o nietypowych przypadkach zapalenia płuc, które pojawiły się w 11 milionowym mieście Wuhan. 12 stycznia 2020 roku WHO podało informację, że mamy do czynienia z koronawirusem, a 30 stycznia ogłosiło globalne zagrożenie. (Duszyński i in., 2020, s. 65). Łatwość przemieszczania się oraz sposób rozprzestrzeniania się wirusa spowodowały, że w krótkim czasie pandemia objęła swoim zasięgiem cały świat. Walka z jej skutkami stanowiła olbrzymie wyzwanie dla służb medycznych. Izolacja i zachowanie dystansu społecznego, wprowadzane, aby powstrzymać rozprzestrzenianie się wirusa, wymagały zastosowania wielu środków nadzwyczajnych ograniczających wolności obywatelskie, a ich skutkiem było wyhamowanie gospodarek krajów dotkniętych pandemią (Stawicka, Stawicki, 2020, s. 3).

Do kalendarza spotkań organizacji bałtyckich na początku 2020 roku wpisano wiele wydarzeń (spotkania zarządów organizacji, grup roboczych, jak i konferencji plenarnych). Tymczasem 31 stycznia 2020 wykryto wirusa w Szwecji, 27 lutego w Estonii, 4 marca w Polsce, a 5 marca już w 84 państwach. 17 marca UE zablokowała swoje granice dla krajów niebędących jej członkami (Duszyński i in., 2020, s. 65). W Polsce wezwano obywateli do pozostania w domach, a pracodawców do organizowania pracy zdalnej. Dla osób powracających z zagranicy oraz tych, którzy mieli kontakt z osobą zakażoną, wprowadzono czternastodniową kwarantannę (Stawicka, Stawicki, 2020, s. 12).

Na zlecenie Eurofund przeprowadzono badanie „Living and working and COVID-19”, które pozwoliło stwierdzić, że podczas pandemii COVID-19 udział pracy zdalnej w sektorze administracji publicznej zwiększył się do ponad 60%. W jeszcze większym zakresie dotyczyło to pracowników sektora finansowego (ponad 70%) i edukacyjnego (ponad 80%) (Eurofund, 2020). Sytuacja ta była charakterystyczna także dla RMB.

Z uwagi na rozprzestrzeniającą się pandemię, aktywność organizacji bałtyckich w dotychczasowej formie stała się niemożliwa do realizacji. Musiały one, tak jak i cała Europa, odnaleźć się w nowej rzeczywistości.

Pandemiczna rzeczywistość współpracy bałtyckiej

Ważnym wydarzeniem dla wszystkich organizacji bałtyckich w 2020 roku było 11. Forum Strategii Unii Europejskiej dla Regionu Bałtyckiego (SUERMB), współorganizowane przez CBSS. Niestety, ze względu na obecność koronawirusa, jedno z największych wydarzeń w kalendarzu bałtyckich organizacji także zostało przeprowadzone w formie zdalnej (CBSS, 2021c). Rok później, 12. Forum, które zostało zorganizowane przez Litwę we współpracy z UBC, ponownie przeprowadzone zostało online. W takiej samej formule organizowano wszystkie kontakty i narady w ramach SUERMB, w tym spotkania narodowych koordynatorów. Warto jednak zaznaczyć, że mimo tych obiektywnych trudności udało się podtrzymać intensywność współpracy interesariuszy SUERMB (Sprawozdanie).

W przypadku CBSS ministrowie spraw zagranicznych RMB mieli zaplanowane kolejne posiedzenie w 2020 roku na duńskiej wyspie Bornholm, niestety z uwagi na pandemię odbyło się ono online 19 maja 2020 roku. Ważnym tematem obrad stał się COVID-19 i współpraca państw w tym zakresie. Poza tym rozmawiano o: zaangażowaniu młodzieży, klimacie i ochronie środowiska oraz walce z zorganizowaną przestępczością (CBSS, 2020a). 1 lipca 2020 roku prezydencję w organizacji przejęła Litwa i jako główne tematy pracy CBSS wyznaczyła: rozwój zielonego przemysłu, w tym turystyki ekologicznej i morskiej mającej na celu ożywienie gospodarki regionalnej, zwiększenie widoczności regionu, zapewnienie możliwości zatrudnienia młodym ludziom. W związku z pandemią postanowiono także zająć się kwestiami związanymi z przestępczością czy handlem dziećmi w dobie digitalizacji kontaktów społecznych (CBSS, 2020b). Sprawne przekazanie prezydencji w organizacji wskazuje, iż CBSS odnalazło się w nowej, pandemicznej rzeczywistości.

6 maja 2021 roku CBSS zorganizowało międzynarodową konferencję online dotyczącą handlu ludźmi, ze szczególnym zwróceniem uwagi na to, że proceder ten w erze cyfrowej coraz częściej dotyczy dzieci. W spotkaniu wzięło udział ponad 200 uczestników, którzy wysłuchali ekspertów i dyskutowali, jaki wpływ na handel dziećmi ma obecnie postępująca digitalizacja życia społecznego (CBSS, 2021a).

1 lipca 2021 roku prezydencję w CBSS przejęła Norwegia. W jej założeniach znalazło się dążenie do ciągłości i spójności prac CBSS w czasie, gdy w wielu państwach członkowskich trwa powrót do zdrowia po COVID-19 (CBSS, 2021d). W kalendarzu prac organizacji na drugą połowę 2021 roku znalazły się 124 spotkania przewidziane w formie online, a tylko część z nich postanowiono zorganizować w formie hybrydowej (CBSS, 2021e).

W czerwcu 2021 roku ministrowie spraw zagranicznych państw RMB i przedstawiciele wysokiego szczebla CBSS wzięli udział w spotkaniu (online) podsumowującym prezydencję litewską w CBSS. Omówiono także i przyjęto odnowioną wizję współpracy (Strategia Wileńska II), która ma być wsparciem dla CBSS i innych organizacji bałtyckich przy pogłębianiu współpracy w nowym dziesięcioleciu. Warto zaznaczyć, że spotkanie było relacjonowane także na Twitterze (CBSS, 2021b).

Cykliczną prezydencję w latach 2020–2021 objęło w BSSSC województwo pomorskie. W dniach 18–19 lutego 2020 roku zarząd organizacji spotkał się na obradach w Gdańsku. Pracownicy sekretariatu BSSSC przedstawili wówczas plan działania, strategię komunikacyjną oraz regulamin działań komunikacyjnych, które zostały przyjęte przez zarząd organizacji. Wśród najważniejszych tematów na lata 2020–2021 znalazły się: strategia BSSSC, środowisko, klimat, energia i gospodarka o obiegu zamkniętym, transport i dostępność, polityka morska, kultura i kreatywność, młodzież, a także tematy przekrojowe, takie jak: Strategia Unii Europejskiej dla Regionu Morza Bałtyckiego, współpraca władz lokalnych i regionalnych w kwestiach Wymiaru Północnego i współpracy z Rosją oraz mitygacja i adaptacja do zmian klimatycznych. Omówiono także wydarzenia planowane na 2020 rok, tj. konferencję zwyczajną, która się miała odbyć w Kaliningradzie oraz „Baltic Youth Camp 2020” (zaplanowanym miejscem wydarzenia było Turku) i wiosennego „Youth Spring Event” (w kalendarzu wydarzeń zaplanowany na 19–21 kwietnia 2020 w Gdańsku) (BSSSC, 2020a).

Niestety, w marcu na oficjalnej stronie organizacji ukazał się komunikat „Odpowiedź Komisji Europejskiej na koronawirusa” datowany 23 marca 2020 roku (BSSSC, 2020b). Komunikat nie był powiązany z aktualizacją planu działań – w tym czasie w Europie skoncentrowano się na walce z pandemią.

Następne spotkanie zarządu, z uwagi na sytuację w Europie i zalecenia związane z rozprzestrzenianiem się SARS-CoV-2, zostało zorganizowane 10 czerwca 2020 roku w formie zdalnej. Poinformowano wówczas, że konferencja zwyczajna w 2020 roku oraz następne spotkanie zarządu także odbędą się w formie zdalnej (BSSSC, 2020c). Z uwagi na pandemię, zaakceptowano posiedzenia w formule online. Ostatnie spotkanie prezydencji województwa pomorskiego, w grudniu 2021 roku, miało charakter hybrydowy (część osób uczestniczyła w sposób tradycyjny, a część – zdalnie) (BSSSC, 2021b). Pierwsze spotkanie zarządu w prezydencji województwa zachodniopomorskiego odbyło się w marcu 2022 w wersji online, co może oznaczać, że spotkania zarządu organizacji będą się w takiej formie odbywać w przyszłości (BSSSC, 2022a).

Wydarzeniem, które także przeniesiono do świata wirtualnego było „Youth Spring Event”. Mimo że w pierwotnej wersji było zaplanowane na kwiecień, ostatecznie zorganizowano je w dniach 2–5 czerwca 2020 w formie zdalnej. Wzięło w nim udział 70 uczestników młodzieżowych z 10 państw, 18 ekspertów i 6 polityków. Głównym tematem obrad było różne spojrzenie na pandemię w państwach RMB (BSSSC, 2020d). W 2021 roku wydarzenie „Youth Spring Event” zorganizowano w takiej samej formule, przedmiotem dyskusji było m.in. zagadnienie – nowocześnie demokracja czy zrównoważone społeczeństwo (BSSSC, 2021a).

Najważniejszym corocznym wydarzeniem w BSSSC jest konferencja zwyczajna organizacji. Z uwagi na trwającą pandemię odbyła się ona, podobnie jak inne wydarzenia, w formie zdalnej w dniach 29 września – 1 października 2020 roku. Tematem przewodnim sesji była silna i włączająca współpraca w RMB. Konferencji towarzyszyło także zorganizowane w formie zdalnej spotkanie dla młodzieży – „Youth Autumn Event”. Podsumowując obrady wyrażono nadzieję, że kolejną konferencję uda się już zorganizować w formule bezpośredniej (BSSSC, 2020e). Konferencja zwyczajna BSSSC odbyła się już w formie tradycyjnej 7–8 października 2020 w Kaliningradzie (można było w niej uczestniczyć także w formie zdalnej). Pokazuje to, że pandemia w sposób znaczący zmieniła dostęp do treści omawianych podczas spotkań BSSSC (BSSSC, 2021c).

Wpływ COVID-19 na współpracę bałtycką na poziomie lokalnym możemy obserwować, analizując działania i spotkania organizacji UBC. Jednym z pierwszych, po pojawieniu się wirusa COVID-19, było spotkanie Komisji „Bezpieczne miasta”, które odbyło się 27 marca 2020 roku. Komisja zaprosiła wówczas bałtyckie miasta do wymiany doświadczeń dotyczących walki z pandemią. Obrady przeprowadzono za pośrednictwem platformy MS Teams (UBC, 2020a). Podczas spotkania stwierdzono, że niezbędna jest kolejna sesja – wobec tego kolejna wymiana doświadczeń w formule zdalnej odbyła się 16 kwietnia 2020 roku (UBC, 2020b). W 2020 roku odbyły się jeszcze dwa takie spotkania (UBC, 2020e).

85 spotkanie zarządu UBC zorganizowano 17 kwietnia 2020 roku (online), poruszono wówczas najważniejsze dla organizacji tematy: budżet, digitalizacja miast, strategia i projekty czy działania UBC w ramach SUERMB (UBC, 2020c). Co ciekawe, na stronie internetowej organizacji można znaleźć wiele materiałów z tego spotkania (podsumowania, wystąpienia) (UBC, 2020d). W tej samej formule odbyło się także 86 spotkanie zarządu datowane na 28 października 2020 roku. Warto zauważyć, że UBC nie wykorzystywało tylko jednej platformy do prowadzenia współpracy zdalnej – w przypadku spotkań zarządu wykorzystywano platformę ZOOM (UBC, 2020f).

Do aktywnie działających w 2020 roku komisji UBC należy zaliczyć Także Komisję Kultury i Komisję „Młodzieńcze miasta”. Zorganizowano dwa spotkania warsztatowe online oraz jedno spotkanie dyskusyjne online, a Komisja Kultury zorganizowała trzy spotkania w formie zdalnej. W świecie wirtualnym odbył się także czerwcowy bałtycki obóz młodzieżowy (UBC, 2020e). Warto zaznaczyć, że to wydarzenie zaaranżowano we współpracy z CBSS, UBC, BSSSC, Euroregionem Bałtyk, siecią studencką Erasmus (UBC, 2020g). Druga edycja obozu młodzieżowego online miała miejsce 17 października 2020 i była związana z Forum Strategii Unii Europejskiej dla Regionu Morza Bałtyckiego (SUERMB). Podczas spotkania młodzież przygotowała swój wkład – deklarację, którą przedstawiono podczas konferencji zwyczajnej SUERMB (UBC, 2020h).

Ważne spotkania, które udało się także przeprowadzić w formie zdalnej, dotyczyły HA CAPACITY SUERMB, czyli jednego z jej działań horyzontalnych, w których UBC jest partnerem. W 2020 roku odbyło się siedem narodowych spotkań, podczas których omówiono szczegóły dotyczące projektów realizowanych w ramach działania horyzontalnego CAPACITY (UBC, 2020e).

W 2021 roku wszystkie spotkania UBC także odbywały się za pośrednictwem internetowych platform, nie zrobiono wyjątku nawet dla spotkań zarządu. Łącznie w 2021 roku odbyło się 37

spotkań online. W formule zdalnej odbyła się także 16. generalna konferencja UBC. Następną, w zależności od przebiegu pandemii, zapowiedziano na 2022 lub 2023 rok. Ostatecznie 17. generalna konferencja UBC odbyła się w październiku 2023 roku w Palandze (UBC, 2024). Analiza kalendarium spotkań wykazała, że w przypadku większości tego typu wydarzeń przywrócono tryb stacjonarny, niemniej jednak niektóre spotkania zachowały formułę online (UBC, 2022).

Podsumowanie

Pojawienie się pandemii COVID-19 zmieniło zasady funkcjonowania zarówno społeczności lokalnych, regionalnych, jak i mieszkańców poszczególnych państw. Przeobrażeniu uległy nie tylko relacje międzyludzkie, ale także sposób pracy czy komunikacji w wielu obszarach, co można było obserwować, analizując współpracę w RMB.

Celem artykułu było wykazanie zmian we współpracy w RMB, co dzięki zastosowaniu analizy danych zastanych, udało się zrealizować. Znalaziono wyjaśnienie problemu badawczego, który był podstawą do przeprowadzenia niniejszej analizy. Udało się także potwierdzić, że pandemia COVID-19 wymusiła trwałe oraz przejściowe zmiany w sposobie prowadzenia współpracy w RMB.

Podstawową różnicą w prowadzeniu polityki była całkowita zmiana formy prowadzenia spotkań bałtyckich organizacji. W 2020 roku, po pojawieniu się wirusa COVID-19 w Europie, wszystkie spotkania, które miały się odbyć w formie stacjonarnej zostały przeprowadzone w formie zdalnej. W tym celu używano głównie platform ZOOM i MS Teams. Co ważne, organizacje szybko i sprawnie przeniosły się do świata online, dzięki czemu współpraca międzyregionalna była kontynuowana.

Analiza danych zastanych pozwoliła na wskazanie, że organizacje ulepszyły swoją komunikację. O ile na stronach internetowych ww. organizacji można było znaleźć wiele informacji, to w okresie pandemii ich zakres został mocno wzbogacony i rozszerzony. Wartością dodaną jest szereg nagrań ze spotkań zdalnych, których nie byłoby, gdyby nie nowa rzeczywistość. Oznacza to, że badacze, politycy i inne osoby zainteresowane współpracą bałtycką, mają dobry dostęp do materiałów.

Na uwagę zasługuje także to, że nie wszystkie spotkania wróciły do formuły stacjonarnej. W latach 2022–2023 część wydarzeń nadal odbywała się w formule online lub hybrydowej. Pokazuje to, że społeczność RMB nauczyła się funkcjonować w nowej i trudnej rzeczywistości, zauważyła jej pozytywne aspekty i nie zrezygnowała z dobrych praktyk z okresu ścisłej izolacji.

Pozytywnym aspektem, związanym ze zwiększeniem udziału formy zdalnej i hybrydowej, jest także ich wpływ na środowisko. Spotkania online wiążą się z niższymi kosztami i mniejszą emisją zanieczyszczeń. Jest to szczególnie ważne, gdyż na tym obszarze ochrona środowiska jest jednym z wiodących zagadnień. Aczkolwiek przeprowadzona analiza wskazuje, że podmioty współpracy międzyregionalnej poradziły sobie w nowej rzeczywistości, a dynamika współpracy nie zmniejszyła się, należy mieć nadzieję, że podobne zagrożenia dla współpracy bałtyckiej nie powtórzą się w przyszłości.

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Recenzja

Jacek Bartosiak, Piotr Zychowicz,

Wojna o Ukrainę. Wojna o świat,

Wydawnictwo Rebis, Poznań 2023, ss. 328

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W minionym roku, nakładem Wydawnictwa Rebis, ukazała się książka autorstwa dwóch osób o odmiennym doświadczeniu – doktora Jacka Bartosiaka, założyciela i współwłaściciela *think tanku* Strategy & Future oraz znanego publicysty historycznego Piotra Zychowicza. *Wojna o Ukrainę. Wojna o świat* – to kolejna publikacja poświęcona jakże aktualnemu zagadnieniu, trwającej od 24 lutego 2022 roku wojnie prowadzonej przez Rosję przeciwko Ukrainie.

Omawiana praca jest swego rodzaju kontynuacją publikacji wydanej kilka lat temu – *Nadchodzi III wojna światowa*, co zostało wskazane w krótkim objętościowo wstępie (s. 13–14). Dla ukazania różnych aspektów wspomnianego konfliktu autorzy przyjęli formułę „rozmów” (kolejne rozdziały są zapisem prowadzonego przez nich dialogu), których uzupełnieniem jest licząca kilkadziesiąt stron część zatytułowana „Alfabet Bartosiaka”.

Rozmowa nr 1 (s. 15–55) nosi tytuł – *Bitwa o Kijów*. Ta część książki jest nie tylko osobistym zapisem tego, jak obaj autorzy przyjęli rozpoczęcie agresji Rosji przeciw Ukrainie (24.02.2022 r.), ale przede wszystkim ciekawą analizą przebiegu pierwszej fazy wojny.

Istotną rolę odegrała wówczas nieudana ofensywa rosyjska i próba zajęcia Kijowa „z marszu” poprzez desant na lotnisko Hostomel z udziałem kolumn pancerno-motorowych. W rozmowie pierwszej znalazł się wątek dotyczący planów rosyjskich działań wojennych, przy czym dla Piotra Zychowicza znacznym zaskoczeniem była skala operacji, która miała na celu nie tylko zajęcie Kijowa i obszarów nad Morzem Azowskim, ale całości terytorium Ukrainy (s. 19). Wcześniej Moskwa zamierzała drogą nacisków na Ukrainę i Zachód, powtórzyć sytuację z konferencji monachijskiej w 1938 roku, spodziewając się ustępstw, podobnie jak w 2014 roku, gdy Ukraińcy stracili Krym i część Donbasu. Z tej części książki czytelnik może się dowiedzieć, dlaczego zdaniem obu autorów operacja rosyjska nie stała się kilkudniowym *Blitzkriegiem*, lecz

przewlekłym konfliktem asymetrycznym. Jacek Bartosiak uważał, że stało się tak, ponieważ Rosjanom nie udało się opanować Kijowa i nie doszło do „eliminacji” prezydenta Zełenskigo, według wzoru operacji z 1979 roku, gdy komandosi sowieckiego Specnazu zabili prezydenta Afganistanu Hafizullaha Amina. Kwestia kolejna, to skala oporu stawianego przez wojska ukraińskie w pobliżu stolicy, co ewidentnie zaskoczyło agresorów.

Symbolem fiaska ofensywy Rosjan stała się dotkliwa klęska w bitwie o Hostomel. Na pewno obaj autorzy mają słuszość, że istotną przyczyną wstrzymania marszu rosyjskich kolumn pancernych na kierunku kijowskim stała się logistyka i braki w dostawach paliwa (s. 27). Należy jednak wziąć jeszcze pod uwagę tzw. ukraińską „głębię strategiczną”, tj. rozmiar terytorium kraju, co dodatkowo utrudniło szybkie pokonanie Ukraińców. Autorzy opisują także skuteczną taktykę zwalczania rosyjskich kolumn pancernych i zmechanizowanych, tu przykładem było m.in. użycie na dużą skalę dronów, a zwłaszcza Bayraktarów produkcji tureckiej (s. 35–40). Kolejną kwestią były działania na Morzu Czarnym, a zwłaszcza zatopienie krążownika „Moskwa” (s. 39–41). Ostatnia część tej rozmowy ma charakter analizy kadry dowódczej i jej kompetencji oraz wykształcenia, tak ukraińskiej, jak i rosyjskiej. Pojawia się tam także wątek zbrodni wojennych w Buczy i to, że początek wojny Rosji przeciw Ukrainie stał się swoistym *game changerem* w Europie Środkowo-Wschodniej i początkiem zmian w układzie sił (akcesja Finlandii i Szwecji do NATO).

Rozmowa nr 2 – *Dlaczego Putin wywołał wojnę* (s. 59–91), jest próbą odpowiedzi, dlaczego prezydent Rosji zdecydował się na rozpoczęcie wojny przeciw Ukrainie na tak dużą skalę i dlaczego Federacja Rosyjska szukała w tej nowej agresji (wydawać się mogło szybkiej i zwycięskiej) potwierdzenia swej mocarstwowości (s. 59–63). Naturalna wydaje się chęć zakwestionowania strategii rozszerzania NATO o kraje dawnej sowieckiej strefy wpływów. Putin uznał ponadto, że spektakularny odwrót USA z Afganistanu, który na powrót przejęli talibowie, jest oznaką słabości Stanów Zjednoczonych, dlatego też wspólnie z Chinami i innymi krajami kontestującymi Zachód będzie mógł zbudować nowy ład. Tę część książki można potraktować jako ciekawą analizę rosyjskich interesów politycznych zarówno w tej części świata, jak i w aspekcie polityki globalnej. Obaj autorzy rozmawiają także o tym, jakie znaczenie dla Polski mogłyby mieć ewentualne zmiany i powstanie nowego układu sił, geostrategicznej roli tzw. „Bramy Smoleńskiej”, Obwodu Kaliningradzkiego/Królewieckiego i możliwych naciskach Rosji na NATO, w razie zwycięstwa nad Ukrainą, na wycofanie się z Europy Środkowo-Wschodniej (s. 79–91).

Dość obszerną, w stosunku do pozostałych, jest rozmowa nr 3 – *Gra wielkich mocarstw* (s. 95–135). Autorzy analizują w tej części kwestie interesów gospodarczych takich państw, jak np.: Francja, Wielka Brytania, Niemcy, USA, Chiny i Turcja. Zastanawiają się, jaki wpływ na ich relacje z Rosją miał wybuch wojny i niespodziewany skuteczny opór Ukraińców. To również podjęcie problemu skuteczności zachodnich sankcji i wcześniejszych zobowiązań gospodarczych wobec Moskwy (np. francuskich dostaw komponentów uzbrojenia). Zamknięciem tego rozdziału jest próba odpowiedzi na pytanie, kto w przypadku ewentualnego zakończenia wojny wygra ją pod względem ekonomicznym i czy będą to Stany Zjednoczone, czy raczej Chiny (s. 135).

Dla polskiego czytelnika bardzo interesującą częścią recenzowanej książki okaże się rozmowa nr 4 – *Wnioski z wojny dla Polski* (s. 138–177). Jest to obszerna analiza roli sąsiadów Polski

w obliczu trwającego konfliktu. Autorzy zwracają uwagę na znaczenie opracowanego planu reform i przebudowy Polskich Sił Zbrojnych, w tym np. Armii Nowego Wzoru (s. 156–162), podają także konkretne przykłady, prowadzonych na dużą skalę, zakupów nowoczesnego sprzętu wojskowego. Pojawia się także problem sąsiedztwa z Białorusią, kraju w bardzo dużym stopniu zależnego od Federacji Rosyjskiej (s. 163–167). Jako pewną słabość tego rozdziału odbieram rozważania autorów na temat tego, ile czasu ma Polska i jak może się bronić przed ewentualnym atakiem Rosji nie tylko na nasz kraj, ale w razie konfliktu Rosja – NATO (s. 168–172). Z uwagi na to, że wspomniane rozmowy przeprowadzono w roku 2023 (czerwiec – wrzesień), w tym samym roku książka została też opublikowana, rozważania te mają charakter czysto teoretyczny, gdyż wojna trwa nadal, a jej przebieg jest niewiadomy. Rozdział ten zamyka dyskusja nad bardzo trudną kwestią, która w ubiegłym roku miała znaczący wpływ na pogorszenie stosunków polsko-ukraińskich – handlu zbożem i jego pojawienia się na rynku polskim (s. 173–174).

Aspekty militarne i analiza użycia niektórych typów uzbrojenia to temat rozmowy nr 5 – *Wojna na wyniszczenie* (s. 181–216). Jest to próba porównania aktualnie toczącej się wojny ze strategią i taktyką wcześniejszych konfliktów (np. drugą wojną światową) oraz stosowanych wtedy środków walki. Do tego wątku wracają autorzy także w końcowej części rozdziału, tym razem przywołując m.in. konflikt w Korei, trwający w latach 1950–1953 (s. 215). Po raz kolejny pojawił się wątek użycia dronów i rozmowa o roli czołgów i sił pancernych na współczesnym polu walki w trzeciej dekadzie XXI wieku (s. 183–188). Bartosiak i Zychowicz rozważają także problem skutecznego użycia na froncie rosyjsko-ukraińskim wyrzutni HIMARS i jednego z kluczowych epizodów tej wojny – ciężkich walk o miasto Mariupol i kombinat Azowstal. To także przyczynek do omawiania taktyki walki na obszarze zurbanizowanym w warunkach nowoczesnej wojny (s. 189–191). W tej części książki przedstawiono także analizę zwycięskiej ofensywy ukraińskiej na Charkowszczyźnie i walk o Chersoń (s. 193–194). Dla równowagi, obaj autorzy podejmują także rozważania o skuteczności użycia przez armię ukraińską sprzętu pancernego, w tym niemieckich „Leopardów”, co nie przyniosło spodziewanych rezultatów (ofensywa i okrążenie sił rosyjskich), stracono natomiast dużo sprzętu wojskowego. W tej rozmowie po raz kolejny pojawił się wątek związany z użyciem sprzętu wojskowego na Ukrainie, problemów z dostarczaniem nowoczesnej pomocy wojskowej przez państwa zachodnie oraz źródeł tych trudności. Zamknięciem tej części jest swego rodzaju bilans i ocena działań wojennych od lutego 2022 do drugiej połowy 2023 roku – rozważania o sukcesach i klęskach Ukrainy na polu militarnym i ekonomicznym.

Ostatnia część recenzowanej pracy – rozmowa nr sześć – *Polska na rozdrożu* (s. 219–249) to kolejna analiza geopolitycznego usytuowania Polski w przeszłości – w obliczu i podczas drugiej wojny światowej – jak i obecnie. Czytelnik może się również dowiedzieć o niektórych aspektach działalności *think tanku* Strategy & Future kierowanego przez Jacka Bartosiaka i problemów poruszanych w jego wcześniejszej książce – *Najlepsze miejsce na świecie*. To także rozważania o politycznej strategii Federacji Rosyjskiej i budowania przez nią nowego systemu sojuszy z takimi państwami jak Indie i Chiny oraz ewentualnej konfrontacji z USA, jako element nowego ładu światowego. W bardzo ciekawy sposób przedstawiono różne aspekty współpracy

polsko-amerykańskiej, tj. podobieństw i rozbieżności interesów polityczno-gospodarczych obu państw. Zamknięciem tego rozdziału jest kwestia ewentualnej wygranej Rosji i przesunięcia jej obecności polityczno-militarnej nad Bug, czy tragicznych następstw ewentualnego przebiegu działań wojennych na terytorium RP (s. 249).

Część końcowa to *Alfabet Bartosiaka*, który jest autorską definicją takich haseł, jak np. Armia Nowego Wzoru, Brama Smoleńska, Chiny, drabina eskalacyjna, Eurazja, geopolityka, Heartland, hegemon, hegemon światowy, intermarium, mapy mentalne, mgła wojny, projekcja siły, przepływy strategiczne, Putin, Rimland, strefa zgniotu (s. 250–328).

Atrakcyjność recenzowanej publikacji podnoszą mapy obrazujące teatr działań wojennych z zaznaczonymi głównymi miejscami walk i geopolitycznego usytuowania Polski, wraz z Przesmykiem Suwalskim. Wartościowe są także barwne zdjęcia przedstawiające np. używany przez strony konfliktu sprzęt wojskowy, teren walk czy zniszczenia wojenne.

Publikacja ta na pewno nie jest linearnym i chronologicznym zapisem wydarzeń czy pełną monografią tej wojny. Po fiasku ofensywy armii ukraińskiej, którą zatrzymały pasy fortyfikacji i pól minowych w 2023 roku, działania wojenne przybrały charakter pozycyjny, na wzór tych z czasów pierwszej wojny światowej. Jednym z przykładów są wielomiesięczne walki o Awdiżiwkę (zdobyta przez Rosjan w drugiej połowie lutego 2024 roku).

Z uwagi na dynamikę sytuacji trudno dziś wyrokować jednoznacznie o dalszym przebiegu konfliktu, czy tym bardziej o tym, kiedy i jak wspomniana wojna się zakończy. Omawiana publikacja jest już kolejną poświęconą temu tematowi (ukazała się m.in. książka A. Małkiewicza, P. Szymańca, *Wojna nowego wieku? Agresja Rosji przeciw Ukrainie 2022–2023*) i zapewne z uwagi na rozwój wydarzeń nie ostatnią...

Cytowanie

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In memoriam Profesor Charles Herbert Elworthy

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Profesor dr hab. Charles Herbert Elworthy urodził się 5 listopada 1961 roku w maoryskim Timaru (Nowa Zelandia), nie był jednak Maorysem, a klasycznym „nowozelandzkim Anglikiem” i doskonałym przykładem tezy, że na tej wyspie, byłej kolonii brytyjskiej, zachowały się tradycyjne angielskie obyczaje, maniery (także językowe, które dzisiaj w Wielkiej Brytanii często uznane są za archaizmy). To efekt nie tylko kolonialnego okresu w historii wyspy, ale także samego położenia – Nowa Zelandia – ze względu na odległość ma (miała) utrudniony lub spowolniony kontakt z metropolią. Charles nosił różnego rodzaju marynarki w kratę, a koszule „ozdabiał” muchą (rzadziej krawatem). Mógł uchodzić za dystyngowanego angielskiego dżentelmena i idealnie pasował do wizerunku klasycznego profesora uniwersyteckiego. Dzięki temu studenci mieli niepowtarzalną okazję poznać inną kulturę akademicką oraz podręcznikowy język angielski.

Do Instytutu Politologii i Europeistyki Uniwersytetu Szczecińskiego przyszedł w roku 2001 i od razu rozpoczął pracę w Zakładzie Integracji Europejskiej im. Jeana Monneta. Głównym obszarem jego zainteresowań było modelowanie zarządzania (governance w naukach o polityce), zajmował się także budowaniem alternatywnych modeli psychologicznych i ich zastosowaniem do zachowań politycznych oraz do stosunków międzynarodowych, w tym do ich subobszaru, jakim jest integracja europejska. W Instytucie Politologii i Europeistyki był członkiem Rady Naukowej, brał także udział w postępowaniach doktorskich i habilitacyjnych.

Prof. Charles Herbert Elworthy był absolwentem Uniwersytetu Yale oraz Uniwersytetu w Cambridge, które ukończył równolegle w 1987 roku. Obszarem Jego zainteresowań było zastosowanie zarządzania (governance w naukach o polityce), w tym w takiej polityce publicznej, jaką jest rolnictwo (*Sustianability Strategies to Enhance Farmland Returns*, Craigmores Research 2012; *Map of Agriculture*, Oxford 2012), a z drugiej strony budowanie alternatywnych modeli psychologicznych i ich zastosowanie do zachowania politycznego oraz do stosunków

międzynarodowych, w tym do ich subobszaru, jakim jest integracja europejska. Efektem tych badań były nowatorskie opracowania naukowe (*Adaptation, Maximisation, and Expression: The Evolutionary Foundations of an Integrated Behavioural Science*, Berlin 1991 oraz *The Reciprocal Influence of Institutions and Policies: The Evolutions of Governance Structure in New Zealand, 1840–1993*, Berlin 2001). Jego zainteresowania zrównoważonym rozwojem oraz szeroko pojętą ekologią zaowocowały przełomowymi naukowymi publikacjami międzynarodowymi (*Homo Biologicus: An Evolutionary Model for the Human Science*, Duncker & Humboldtd, Berlin 1993 oraz *Evolutionary Psychology. The Appropriate Disciplinary Link between Evolutionary Theory and the Social Sciences*, Westport 1999).

W 1991 roku prof. Ch. Elworthy obronił pracę doktorską – *Adaptation, Maximisation, and Expression: The Evolutionary Foundations of an Integrated Behavioural Science* na Wydziale Nauk Politycznych Freie Universität w Berlinie. Dziesięć lat później na tym samym uniwersytecie otrzymał stopień doktora habilitowanego na podstawie – *The Reciprocal Influence of Institutions and Policies: The Evolutions of Governance Structure in New Zealand, 1840–1993*. Oznacza to, że był profesorem z habilitacją (na wzór polski). Jest to o tyle istotne, że w modelu przyjętym w krajach anglosaskich nie ma habilitacji i profesorem zostaje się często już po doktoracie.

Praca naukowa nie była jedynym obszarem aktywności profesora. Jego zdolności organizacyjne ujawniły się wraz z założeniem w 1991 roku Europäische Akademie, usytuowanej w barokowym zamku w Wartin, gdzie objął stanowisko dyrektora. Funkcję tę pełnił równolegle z pracą w Instytucie Politologii i Europeistyki Uniwersytetu Szczecińskiego. Od początku zamiarem profesora Elworthy'ego było, aby Akademię Europejską w Wartin zorganizować na wzór college'u w Cambridge – tak też się stało.

Wartin w brandenburskim powiecie Uckermark stało się swoistym miejscem na ziemi prof. Elworthy'ego. Wraz z prof. Hansem-Joachimem Mengelem przyczynili się do przywrócenia mu dawnego wyglądu. To tutaj powołał Fundację Collegium Wartinum (Collegium Wartinum Foundation), która wspierała wiele inicjatyw kulturalnych, naukowych i artystycznych. W 2009 roku zainspirowany ekologicznym szczytem COP15 („Conference of the Parties”) w Kopenhadze, w którym brał udział, powołał do życia organizację Bhui, której celem jest promowanie zrównoważonego rozwoju przedsiębiorstw. Ponadto na wzór Akademii Europejskiej w Wartin założył podobną Akademię Europejską w Schwedt, aby wspierać te wszystkie działania, także inwestycyjne, prof. Ch.H. Elworthy powołał do życia Schloss Wartin Betriebsgesellschaft mbH, które wspierało funkcjonowanie Akademii Europejskiej w Wartin.

Nie ulega wątpliwości, że prof. Charles H. Elworthy był nie tylko naukowcem, ale także prężnym organizatorem, inwestorem oraz aktywistą ekologicznym. Te zalety doskonale wpisywały Go w realia i potrzeby współczesnego świata.

Profesor Charles Elworthy był pierwszym pracownikiem naukowym Instytutu Politologii i Europeistyki Uniwersytetu Szczecińskiego, który w 2018 roku, po kilkunastu latach pracy z nami i z naszymi studentami, rozpoczął pracę na Uniwersytecie Oksfordzkim oraz

Uniwersytecie w Cambridge. Nie można wykluczyć, że taka sytuacja nie powtórzy się wkrótce, a może nawet nie wystąpi nigdy.

Profesor Charles Herbert Elworthy zmarł w Oxfordzie 8 czerwca 2023 roku.

Cytowanie

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