Acta Politica Polonica

nr 2/2022 (54)

Spis treści

Transformacja Estonii po rozpadzie Związku Radzieckiego. Determinanty historyczne i analiza porównawcza skutków

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Słowa kluczowe: Estonia, Związek Radziecki, transformacja, demokracja, edukacja, cyfryzacja

Abstrakt   Estonia jest jednym z piętnastu państw powstałych na skutek rozpadu Związku Radzieckiego. Przeprowadziła na tyle skuteczne reformy, że obecnie jest wysoko rozwiniętą pod względem gospodarczym i społecznym zachodnią demokracją. Obecnie Estonia znajduje się w czołówce państw postradzieckich i byłych satelickich pod względem wolności od korupcji, demokratyzacji, poziomu edukacji czy budowania społeczeństwa cyfrowego.

Głównym celem artykułu była odpowiedź na pytanie dotyczące społecznych, politycznych i ekonomicznych efektów reform przeprowadzonych w Estonii po uniezależnieniu się tego państwa od Związku Radzieckiego (ZSRR). Poprzez porównanie odpowiednich wskaźników implikacje tych reform zostały przedstawione na tle innych byłych republik radzieckich i państw Europy Środkowo-Wschodniej. W artykule przedstawiono również historyczne determinanty prozachodniej orientacji Estonii i jej mieszkańców. Bez społecznego poparcia dla integracji z Europą Zachodnią przeprowadzenie udanej transformacji byłoby niemożliwe. Spośród czynników historycznych największy wpływ na sposób i jakość przeprowadzonych w Estonii reform miało wielosetletnie oddziaływanie zachodnioeuropejskiej, szczególnie niemieckiej, kultury i gospodarki.

Wyniki badań pokazują, że Estonia jest najmniej dotkniętym korupcją i najbardziej demokratycznym państwem obszaru poradzieckiego. Natomiast pod względem jakości kształcenia państwo to zajmuje pierwsze miejsce nie tylko w grupie państw postradzieckich, ale w całej Europie. Pod względem budowania społeczeństwa informacyjnego i e-państwa Estonia jest światowym liderem przedstawianym jako przykład dla innych państw.

Transformation of Estonia after the collapse of the Soviet Union. Historical determinants and comparative analysis of effects

Keywords: Estonia, the Soviet Union, transformation, democracy, education, digitization

Abstract   Estonia is one of the fifteen states created as a result of the collapse of the Soviet Union, which introduced such effective reforms that it is now a highly developed, economically and socially Western democracy. Currently, Estonia is at the forefront of post-Soviet and

former satellite countries in terms of freedom from corruption, democratization, the level of education, and building a digital society. The main aim of the article was to answer the question concerning the social, political, and economic effects of reforms implemented in Estonia after the country became independent from Moscow. By comparing relevant indicators, the implications of these reforms were presented against the background of other former Soviet republics and Central and Eastern European states. The article also presents the historical determinants of the proWestern orientation of Estonia and its inhabitants. Without social support for integration with Western Europe, it would be impossible to carry out a successful transformation. Among the historical factors, the centuries-old influence of Western European, especially German, culture and economy had the greatest impact on the manner and quality of the reforms carried out in Estonia. The research shows that Estonia is the least affected by corruption and the most democratic country in the post-Soviet area. However, in terms of the quality of education, the country ranks first not only in the group of post-Soviet countries, but also in the whole of Europe. On the other hand, in terms of building the information society and e-state, Estonia is a world leader and is presented as an example to other countries.

Wprowadzenie

Estonia jest jednym z najmniejszych państw Europy zarówno pod względem powierzchni, jak i liczby ludności. Zamieszkuje ją około 1 330 000 osób (Statistics Estonia, 2021) i obejmuje ona obszar 45 215 km^2 (Lewandowski, 2002, s. 10). Obok Litwy i Łotwy jest jedną z trzech byłych republik radzieckich, które obecnie są członkami Unii Europejskiej (UE) i Paktu Północnoatlantyckiego (NATO). Możliwość integracji Estonii z gospodarczymi i militarnymi strukturami Zachodu pojawiła się dopiero po formalnym rozpadzie ZSRR w 1991 roku. Kiedy Estonia stała się niepodległa, przeprowadziła szereg reform społecznych, politycznych i ekonomicznych, dzięki którym stała się nowoczesnym, demokratycznym i zorientowanym proeuropejsko państwem.

Kluczową kwestią podniesioną w artykule będzie próba odpowiedzi na pytanie dotyczące determinantów prozachodniej orientacji społeczeństwa Estonii i przyczyn efektywności transformacji ustrojowej tego państwa po roku 1991. Spośród powstałych po rozpadzie ZSRR państw jedynie Estonia wraz z Litwą i Łotwą rozpoczęły reformy, dzięki którym ostatecznie zbudowały prozachodnie i demokratyczne społeczeństwa. W tym samym bowiem okresie niepodległość uzyskały również takie państwa, jak np. Białoruś czy Turkmenistan, w przypadku których trudno mówić zarówno o prozachodniej orientacji, jak i o systemie demokratycznym.

Drugie pytanie badawcze będzie dotyczyło efektów społecznych, gospodarczych i politycznych zmian, które zaszły w Estonii po rozpadzie ZSRR, oraz czy Estonia wykorzystała zmianę sytuacji geopolitycznej na swoją korzyść. Zbadanie procesów demokratyzacji i europeizacji Estonii wymaga zastosowania wielu metod badawczych. Przede wszystkim będą to metody historyczna i komparatystyczna (porównawcza).

Podejście historyczne jest jednym z najczęściej stosowanych podejść badawczych w naukach politycznych (Pawłuszko, 2013, s. 7). Aby zrozumieć współczesny system społeczny i polityczny państwa, niezbędne jest zastosowanie podejścia historycznego. Amerykański historyk i politolog Peter Charles Hoffer podkreśla, że podstawą zrozumienia każdego zjawiska będącego przedmiotem badań politologicznych są wnikliwe badania jego historii (Hoffer, 2008, s. 106–127).

Z kolei dziewiętnastowieczny angielski historyk, John Robert Seeley, napisał, że „historia jest przeszłością polityki, a polityka jest teraźniejszością historii" (Himmelfarb, 2004, s. 172). Leszek Moczulski w książce *Geopolityka. Potęga w czasie i przestrzeni* podkreśla, że „zmienne układy przestrzenne nie odchodzą w przeszłość bez śladu" (Moczulski, 2010, s. 316). Jednak zastosowanie podejścia historycznego nie oznacza prześledzenia całej historii Estonii. Analizie historycznej zostaną poddane przede wszystkim te wydarzenia i procesy, które według autora determinowały kierunek rozwoju Estonii po rozpadzie ZSRR. Będą to kształtujące kulturę i gospodarkę aspekty związków ziem estońskich i ich mieszkańców z Europą Zachodnią.

Następnie zastosowana zostanie metoda komparatystyczna, często uważana za jedną z podstawowych metod badawczych w politologii i mająca w tej dyscyplinie naukowej większe znaczenie niż w pozostałych naukach społecznych. Według włoskiej politolog Donatelli della Porty „porównywanie to podstawa każdej wiedzy" (Bajer, 2012, s. 16), a według Davida Colliera porównywanie to główne narzędzie analityczne i w naukach politycznych jest często wykorzystywane w powiązaniu z metodami stosowanymi w innych dyscyplinach naukowych, takimi jak analiza statystyczna czy badania historyczne (Collier, 1993, s. 105). Zdaniem części politologów w celu porównania zjawisk politycznych należy porównać również ich genezy. W takim wypadku ma miejsce połączenie metody porównawczej z historyczną (Yengoyan, 2006, s. 13.). Często metoda porównawcza bywa określana jako rozszerzenie metody historycznej (Schermes, 2007, s. 48). W kontekście przemian, jakie zaszły w Estonii od roku 1992, najistotniejsze będzie porównanie jej z pozostałymi, byłymi republikami radzieckimi. Porównane zostaną przede wszystkim wskaźniki opisujące rozwój społeczny i odpowiadające za rozwój gospodarczy.

Zastosowana zostanie również metoda ilościowa, która w naukach politycznych wykorzystuje dane liczbowe opisujące zjawiska będące przedmiotem ich badań. Metoda ta jest często powiązana z metodą porównawczą i służy zazwyczaj usystematyzowaniu danych (Bennett, 1986, s. 1–2).

Powyższe metody uzupełnione o systemową, jakościową i instytucjonalno-prawną pozwolą na zbadanie przyczyn, przebiegu i skutków zmian, które zaszły w polityce, gospodarce i położeniu geopolitycznym Estonii oraz w społeczeństwie tego państwa w latach 1992–2000.

Historyczne determinanty europejskości Estonii

Rzeczywistość polityczna państwa jest uwarunkowana historycznie i podlega ciągłym zmianom w czasie, a zrozumienie współczesnych zjawisk i procesów społecznych wymaga poznania ich genezy i ewolucji. Procesy integracji Estonii ze strukturami Europy Zachodniej są pochodną historii tego państwa. Podejście historyczne umożliwia prześledzenie procesu kształtowania się systemu społeczno-politycznego Estonii. Aby zrozumieć współczesne determinanty polityki Estonii, należy przeanalizować historię kształtowania się społeczeństwa tego państwa i jego związków z innymi społeczeństwami od czasów najdawniejszych.

O początkach należących do ludów ugrofińskich Estończyków i Estonii nie wiadomo niestety nic (Okulicz-Kozaryn, 1993, s. 7–27). Z powodu braku źródeł pisanych historię plemion ugrofińskich badać można jedynie lingwistycznie, etnograficznie czy snuć hipotezy na podstawie znalezisk archeologicznych. Nie wiadomo, kiedy dokładnie plemiona ugrofińskie przybyły

na terenie dzisiejszej Estonii i Finlandii. Nie podlega jednak dyskusji wspólne pochodzenie Estończyków i Finów (Cieślak, 1983, s. 15). Współczesne języki estoński i fiński są podobne do siebie w takim stopniu, że różnice lingwistyczne nie stanowią bariery w porozumiewaniu się ze sobą mieszkańców tych państw.

Większość badań nad zjawiskami takimi, jak rozwój narodów, państw i poczucie przynależności narodowej wiodą do wniosku, że ważnym czynnikiem, mającym wpływ na kształtowanie się narodu i modelowanie państwa, jest język (Kuczkiewicz-Fraś, 2012, s. 123). Niektórzy badacze historii politycznej podkreślają wpływ podobieństw językowych na tworzenie się sojuszy politycznych (Sakkov, 2014, s. 161–164). Na początku XX wieku podobieństwa lingwistyczne i etniczne oraz wspólne korzenie stały się źródłem popularnej w Finlandii i Estonii idei „Wielkiej Finlandii", polegającej na zjednoczeniu wszystkich ludów fińskich w jednym organizmie państwowym. Twórcy i zwolennicy tej idei zakładali, że wszystkie ludy posługujące się językiem fińskim i pokrewnymi do niego stanowią w rzeczywistości jeden naród, który powinien znajdować się we wspólnym państwie (Fingerroos, 2012, s. 483–512). Wśród badaczy estońskich i fińskich przeważa opinia, że ludność ugrofińska zamieszkiwała tereny całej północno-wschodniej Europy na długo przed przybyciem na ten kontynent Indoeuropejczyków (Jornonen, 2017).

Przez większą część swojej historii terytoria zamieszkałe przez Estów znajdowały się pod panowaniem obcych mocarstw, będąc obiektem rywalizacji Hanzy, Szwecji, Danii, Królestwa Korony Polskiej, księstw ruskich, Zakonu Kawalerów Mieczowych (później Prus). Jednocześnie przez wiele stuleci obszar współczesnej Estonii stanowił wschodnią rubież, reprezentowanej głównie przez Niemców, kultury zachodnioeuropejskiej (Lewandowski, 2002, s. 5). Kultura niemiecka miała wpływ na mieszkańców Estonii bez względu na zmieniającą się na przestrzeni wieków przynależność państwową tych terenów. Według części estońskich badaczy to właśnie związki kulturowe z Niemcami ukształtowały w dużej mierze współczesne społeczeństwo Estonii (Sakova-Merivee, 2015).

Jednak aby mieć pełniejszy obraz obecnej sytuacji politycznej i gospodarczej w Estonii oraz jej związków z Europą Zachodnią, należy rozpocząć analizy historyczne od roku 1194, kiedy to papież Celestyn III wezwał do chrystianizacji północno-wschodnich części Europy. Na wezwanie odpowiedziało głównie rycerstwo niemieckie, zakładając na terenach dzisiejszych państw bałtyckich komturie i budując zamki (Christiansen, 2009, s. 117). Można zauważyć, że dla krzyżowców gospodarka była rzeczą najważniejszą. Nie prowadzili oni wojen jedynie dla idei, ale w celu zaprowadzania swojego porządku i czerpania korzyści materialnych. Kiedy zamków krzyżackich przybywało, gospodarka stawała się coraz bardziej efektywna.

W roku 1202 w Rydze niemieccy osadnicy utworzyli Zakon Kawalerów Mieczowych, który w roku 1237 połączył się z Zakonem Szpitala Najświętszej Marii Panny Domu Niemieckiego w Jerozolimie (Krzyżakami), przejmując jego regułę (Rudnicki, *Zakon…*). Do połowy XIII wieku rycerze podbili ludność miejscową i zarządzali niemal całym obszarem współczesnej Estonii (Christiansen, 2009, s. 154–159). Ugruntowała się tam wówczas dominująca pozycja gospodarcza Niemców. Według wielu historyków taki stan utrzymywał się aż do wybuchu I wojny światowej w roku 1914 (Lewandowski, 2002, s. 111–160). Nawet kiedy ziemie te znajdowały się pod zarządem

innych państw, pod względem gospodarczym były zdominowane przez Niemców. Jednocześnie od połowy XIII wieku działała i rosła w siłę Hanza, grupa miast portowych w basenie Morza Bałtyckiego, która stanowiła silne wsparcie dla niemieckiej gospodarki na terenie Estonii i całych Inflant.

Przyłączenie Estonii do Rosji w 1721 roku nie zmieniło dominującej pozycji Niemców bałtyckich. Dodatkowo otworzyły się dla nich możliwości robienia karier wojskowych i urzędniczych na dworze petersburskim. Jednocześnie, dzięki otworzeniu się rosyjskiego rynku na produkty estońskie, właściciele ziemscy i kupcy mogli powiększać swoje majątki (Lewandowski, 2002, s. 107–113).

W połowie XIX wieku na skutek estońskiego przebudzenia kulturowego zaczęła się tworzyć estońska tożsamość narodowa. Industrializacja i urbanizacja zaczęły łamać stary porządek. W miastach liczba Estończyków przewyższyła liczbę Niemców. Rodziła się estońska prasa, w której coraz częściej przedstawiane były postulaty autonomii Estonii. Odpowiedzią caratu były represje i zintensyfikowanie rusyfikacji. To z kolei spowodowało zmianę postawy niemieckiego ziemiaństwa wobec miejscowej ludności. Dotychczasowi przeciwnicy nauczania Estończyków języka niemieckiego przeszli do propagowania germanizacji (Lewandowski, 2002, s. 137–138). Żądania polityczne dotyczące autonomii Estonii znalazły silny wyraz podczas rewolucji 1905 roku. W tym samym roku w Tartu zorganizowano Kongres Ogólnoestoński (Iwaskiw, 1995).

Mimo ograniczeń związanych z dominacją Rosji w sferze polityki, przed wybuchem I wojny światowej estońskie społeczeństwo było już dobrze zorganizowane i otwarte na szeroko rozumianą kulturę zachodnioeuropejską. Nowe idee przenikały do Estonii zazwyczaj za pośrednictwem Finlandii, najbliższego pod względem kultury i języka sąsiada (Lewandowski, 2002, s. 161).

Podobnie jak pozostałe państwa bałtyckie, Litwa i Łotwa, po zakończeniu I wojny światowej Estonia proklamowała niepodległość. System polityczny niepodległej Estonii charakteryzował się niestabilnością i częstymi zmianami rządów, które w latach 1918–1933 zmieniały się dwadzieścia trzy razy. Na początku lat trzydziestych w Estonii, podobnie jak w wielu innych państwach europejskich w tamtym okresie, rosło poparcie dla silnych form sprawowania władzy. Zaproponowano kilka zmian konstytucyjnych, z których najbardziej radykalna została zgłoszona przez protofaszystowską Ligę Weteranów Wojny o Niepodległość (Iwaskiw, 1995).

Zaniepokojony możliwością przejęcia władzy przez faszystów wicepremier Konstantin Päts zorganizował prewencyjny zamach stanu 12 marca 1934 roku. We współpracy z armią rozpoczął sprawowanie, trwających praktycznie bez przerwy do 1940 roku, rządów. Zawiesił funkcjonowanie parlamentu i działalność partii politycznych. Przywódcy Ligi zostali aresztowani. Początkowo działania Pätsa popierała większość estońskiego społeczeństwa, jednak po zneutralizowaniu zagrożenia ze strony Ligi pojawiły się postulaty powrotu do demokracji parlamentarnej. W 1936 roku Päts zaproponował liberalizację, wybory do zgromadzenia konstytucyjnego i uchwalenie nowej konstytucji. Jednak podczas wyborów do nowego parlamentu partie polityczne pozostawały zawieszone, z wyjątkiem Frontu Narodowego Pätsa. W 1938 roku Päts został wybrany przez nowy parlament na prezydenta (Iwaskiw, 1995).

Niepodległość Estonii nie trwała jednak długo. Podpisany 23 sierpnia 1939 roku pakt o nieagresji między Niemcami a Związkiem Radzieckim, zwany „paktem Ribbentrop-Mołotow", zawierał tajny protokół mówiący między innymi o włączeniu Estonii do radzieckiej strefy wpływów.

W myśl tego protokołu w drugiej połowie września 1939 roku ZSRR zażądał od Estonii zmian w stosunkach politycznych. Pod naciskiem władz radzieckich i z powodu braku jakiejkolwiek reakcji ze strony państw zachodnich, na przełomie września i października 1939 roku Estonia zawarła ze Związkiem Radzieckim układ o przyjaźni, współpracy i wzajemnej pomocy. Najistotniejsze dla dalszej przyszłości Estończyków okazało się wyrażenie zgody na rozmieszczenie na swoich terytoriach radzieckich baz wojskowych. Latem 1940 roku Estonia stała się republiką radziecką (Lewandowski, 2002, s. 213–217).

W 1941 roku do Estonii wkroczyli Niemcy. Postrzegając Związek Radziecki jako swojego największego wroga, Estończycy witali wojska niemieckie entuzjastycznie, traktując je jak wyzwolicieli. W przeciwieństwie do pozostałych, okupowanych przez III Rzeszę państw, w Estonii ruch oporu niemal nie istniał (Hiio, 2009).

Próby sowietyzacji i rusyfikacji Estonii po II wojnie światowej

Po zakończeniu II wojny światowej Estonia pozostała częścią ZSRR. Na masową skalę zaczęły się deportacje na Syberię. Rozpoczęto przymusową kolektywizację. Sowietyzacja Estonii dotyczyła wszystkich sfer aktywności społecznej, gospodarczej i politycznej. Nasilenie tego procesu przebiegało z różnym natężeniem w różnych okresach.

Dynamicznie postępująca industrializacja kraju spowodowała znaczący napływ ludności rosyjskojęzycznej, który ze względu na różnice lingwistyczne między ludnością miejscową a napływową miał w Estonii szczególne skutki. Przed II wojną światową, poza Estończykami, na terytorium Estonii zamieszkiwali przede wszystkim pochodzący z państw sąsiednich Szwedzi, Rosjanie, Łotysze oraz nieposiadający własnego państwa Żydzi. Liczba przedstawicieli innych narodowości była stosunkowo niewielka. Dużą grupę stanowili również Niemcy bałtyccy. Włączenie Estonii do Związku Radzieckiego diametralnie zmieniło tę sytuację (Tõnurist, 2013, s. 67).

Pod koniec istnienia Związku Radzieckiego, w przededniu proklamowania niepodległości, Estonia była zamieszkana przez niemal 1,6 mln osób, z czego 61% stanowili Estończycy, a około 30% Rosjanie (Eesti Statistika). Inne, posługujące się głównie językiem rosyjskim, mniejszości etniczne, w tym Ukraińcy, Białorusini i Żydzi, zazwyczaj identyfikowali się politycznie z Rosjanami i byli postrzegani jako Rosjanie przez rdzenną ludność Estonii (Immigration and Refugee Board of Canada, 1992).

Imigrantom rosyjskojęzycznym, którzy przybyli do Estonii po zakończeniu II wojny światowej (głównie do pracy w kompleksach przemysłowych lub służby w wojsku radzieckim), zapewniano mieszkania (często niedostępne dla Estończyków) i własne, oddzielone od estońskiego systemu edukacji, szkoły. W okresie radzieckim Rosjanie byli zazwyczaj zatrudniani przy pracach fizycznych (które w systemie radzieckim były lepiej płatne), podczas gdy stanowiska umysłowe (gorzej płatne) były zdominowane przez Estończyków. Do 1990 roku również każdy aspekt polityki był zdominowany przez Rosjan. Wszystkie te czynniki spowodowały, że w okresie radzieckim w Estonii niemal niezależnie funkcjonowały równolegle dwie grupy etniczne (Immigration and Refugee Board of Canada, 1992). Utrudnione kontakty Estończyków z ludnością napływową wynikały nie tylko

z polityki prowadzonej przez ZSRR, ale również z barier językowych. W związku z tworzącymi trudną do przekroczenia barierę różnicami lingwistycznymi, w przeciwieństwie do Ukrainy czy Białorusi, w Estonii nie następował nasilony proces rusyfikacji językowej ludności miejscowej. Również ludność napływowa, bez względu na to, z jakiej części ZSRR pochodziła, nie ulegała estonizacji. Pod koniec dominacji radzieckiej jedynie niespełna 2% ludności republiki niebędącej etnicznymi Estończykami traktowało język estoński jako ojczysty (Eberhardt, 1997, s. 31–33).

Efekty przemian politycznych, społecznych i gospodarczych, które dokonały się w Estonii po rozpadzie ZSRR

Kiedy system komunistyczny w Europie zaczął się rozpadać, głównym, a zarazem wspólnym celem politycznym wszystkich republik bałtyckich stało się uniezależnienie polityczne i gospodarcze od ZSRR. Proces zmian politycznych został wywołany prodemokratycznymi poglądami większości mieszkańców, dążącymi do osiągnięcia zachodnioeuropejskiego poziomu życia (Kirbiš, 2013, s. 244).

Część badaczy postrzega proces europeizacji Estonii oraz Litwy i Łotwy jako efekt powstania silnych związków ekonomicznych z państwami Europy Zachodniej. Największym partnerem handlowym dla Litwy i Łotwy stały się Niemcy, a w przypadku Estonii były to państwa nordyckie, szczególnie Finlandia. Jednocześnie presja wywierana na państwa bałtyckie ze strony Wspólnot Europejskich w okresie przedakcesyjnym spowodowała dostosowanie norm krajowych do standardów europejskich niemal we wszystkich dziedzinach (Kern, Joas, Jahn, 2008, s. 220). Natomiast w odniesieniu do innych państw postradzieckich w ogóle trudno jest mówić o procesie europeizacji w sensie dostosowywania systemu do standardów zachodnioeuropejskich.

Kiedy 20 sierpnia 1991 roku Estonia proklamowała niepodległość, jedną z najważniejszych spraw do rozwiązania były kwestie językowe i narodowościowe. Część ludności rosyjskojęzycznej naturalnie ciążyła ku Rosji i sprzeciwiała się niepodległości Estonii. Już w 1989 roku przystąpiono w Estonii do tworzenia spisów obywateli estońskich, opierając się na prawodawstwie sprzed II wojny światowej, a 26 lutego 1992 roku Rada Najwyższa Estońskiej Socjalistycznej Republiki Radzieckiej przywróciła ustawę o obywatelstwie z 1 lipca 1938 roku, według której jednym z kryteriów przyznania obywatelstwa estońskiego była znajomość języka estońskiego. Na skutek tego działania około pół miliona mieszkających na stałe w Estonii osób zostało pozbawionych obywatelstwa, a co za tym idzie – również praw wyborczych (Szabaciuk, 2016, s. 220). Spowodowało to pozbawienie ludności prorosyjskiej możliwości wpływania na ustrój i politykę państwa. Przywrócenie niepodległości odbyło się na zasadzie ciągłości polityczno--prawnej państwa estońskiego sprzed jego aneksji przez ZSRR (Nutt, 2016). W Estonii doszło do transformacji, dzięki którym mogły rozpocząć się procesy integracyjne z Europą Zachodnią.

Efekty zmian, które zaszły w Estonii po jej politycznym i gospodarczym uwolnieniu się od ZSRR, można zauważyć, stosując metodę porównawczą. Przedstawienie określonych wskaźników opisujących Estonię i jej mieszkańców na tle innych państw pozwala odpowiedzieć na pytanie dotyczące wykorzystania przez Estończyków szans na rozwój własnego państwa po rozpadzie ZSRR.

Pierwszym ze zjawisk, które można porównać, jest korupcja, zjawisko podważające zaufanie do instytucji publicznych, osłabiające demokrację i hamujące rozwój gospodarczy. Według definicji Transparency International (TI) korupcja jest definiowana jako nadużycie powierzonej władzy w celu osiągnięcia korzyści osobistych (Transparency International). TI corocznie publikuje raporty zawierające dane dotyczące poziomu korupcji w poszczególnych badanych państwach. Dla pełniejszego zobrazowania poziomu korupcji w Estonii korzystne jest przedstawienie w tym samym ujęciu czasowym (miejsce w 2020 r. i zmiana w stosunku do 2012 r.) Litwy i Łotwy, które będąc również w przeszłości republikami radzieckimi, stały się członkami Unii Europejskiej, a także Białorusi i Ukrainy – postradzieckimi państwami graniczącymi z UE:

– Estonia – 17. miejsce – awans o 11,
– Litwa – 35. miejsce – awans o 6,
– Łotwa – 42. miejsce – awans o 8,
– Białoruś – 63. miejsce – awans o 16,
– Ukraina – 117. miejsce – awans o 7 (Transparency International, 2021).

Według TI w 2020 roku pod względem wolności od korupcji Estonia zajęła 17. miejsce (na 180 państw), awansując o 11 od roku 2012 i zbliżyła się do poziomu państw nordyckich, które są jednymi z najmniej dotkniętych tym zjawiskiem obszarów na świecie. Warto również dodać, że Estonia jest najmniej dotkniętym korupcją państwem postradzieckim, wyprzedzając pod tym względem także wszystkie pozostałe kraje byłego bloku wschodniego (Transparency International, 2021). Poziom korupcji w danym państwie i społeczna akceptowalność tego zjawiska w sposób bezpośredni wpływa na jakość jego demokracji. Korupcja ma również wpływ na szeroko rozumiany rozwój gospodarczy, który jest odwrotnie proporcjonalny do jej poziomu (Šumah, 2018).

Kolejnym porównywanym wskaźnikiem jest opracowywany przez powiązaną z tygodnikiem „The Economist" jednostkę badawczą The Economist Intelligence Unit wskaźnik demokracji, opisujący poziom demokracji w 165 państwach i 2 terytoriach zależnych (The Economist Intelligence Unit, 2021, s. 3). Opracowane na podstawie raportów za lata 2012 (The Economist Intelligence Unit, 2013) i 2020 (The Economist Intelligence Unit, 2021) porównanie przedstawia miejsce państw w rankingu wskaźnika demokracji za rok 2020 wraz ze zmianą w stosunku do roku 2012:

– Estonia – 27. miejsce – awans o 7,
– Litwa – 42. miejsce – bez zmian,
– Łotwa – 38. miejsce – spadek o 9,
– Białoruś – 148. miejsce – awans o 7,
– Ukraina – 79. miejsce – spadek o 1.

Najistotniejsze wydaje się to, że pod względem demokracji Estonia zajmuje pierwsze miejsce w grupie porównywanych państw. Jednocześnie przywołany powyżej raport za rok 2020 ukazuje Estonię jako najbardziej demokratyczne państwo spośród wszystkich byłych republik radzieckich i państw bloku wschodniego (The Economist Intelligence Unit, 2021).

Jednym z głównych czynników mających wpływ na jakość funkcjonowania państwa jest poziom edukacji. Istnieją badania, które wskazują na istnienie zależności między poziomem i jakością kształcenia a wzrostem gospodarczym (Wiśniewska, 2015). Dane dotyczące jakości

kształcenia pozwalają z pewnym prawdopodobieństwem przewidywać kierunki rozwoju społeczeństw i państw.

Przeprowadzane co trzy lata i koordynowane przez OECD badania PISA odbyły się po raz ostatni w 2018 roku. Badania te wskazały, że uczniowie estońskich szkół są w ścisłej czołówce światowej pod każdym względem. Natomiast na tle Europy estońscy uczniowie potrafią najlepiej liczyć, czytać ze zrozumieniem i rozumować w naukach ścisłych (OECD, 2019).

Aspektem rozwoju Estonii, nad którym warto szczególnie się pochylić, jest budowa społeczeństwa informacyjnego. Obecnie Estonia jest postrzegana jako najbardziej zaawansowane cyfrowo państwo świata, w którym 99% spraw urzędowych można załatwić online (E-estonia). Ma to szczególne znaczenie w dobie pandemii COVID-19 i przeniesienia do cyberprzestrzeni wielu aspektów funkcjonowania społeczeństw. Jednak cyfryzacja społeczeństwa to nie jedynie stworzenie infrastruktury, chociaż od niej należy cały proces rozpocząć. Estonia rozpoczęła przygotowania do stworzenia społeczeństwa informacyjnego już w pierwszych latach po odzyskaniu niepodległości. W 1997 roku 97% estońskich szkół miało dostęp do internetu. Do roku 2002 wszystkie zamieszkałe tereny zostały pokryte darmową siecią Wi-Fi, a od 2007 roku używa się w Estonii elektronicznych dowodów osobistych i możliwe jest głosowanie przez internet (Arets, 2017). Uczniowie estońskich szkół uczą się kodowania już w wieku 7–8 lat (Dzierżek, 2015). Pod względem budowy społeczeństwa cyfrowego Estonia może stanowić przykład dla pozostałych państw, nie tylko postradzieckich czy europejskich, ale całego świata.

Każdy z elementów (poziom korupcji, wskaźnik demokracji, jakość edukacji i stopień cyfryzacji) charakteryzujących współczesną Estonię może stanowić przedmiot osobnych badań. Jednak celem tego artykułu była odpowiedź na pytanie o to, czy Estonia wykorzystała możliwości rozwoju po rozpadzie ZSRR.

Podsumowanie

Po 1991 roku Estonia dokonała najefektywniejszej w Europie transformacji ustrojowo-gospodarczej. Pod względem uproszczenia biurokracji, przejrzystości działań władz na każdym szczeblu i cyfryzacji administracji państwo to może stanowić przykład dla innych. Do czynników, które miały wpływ na sukces Estonii, można zaliczyć uwarunkowania historyczne i ukształtowane nimi nastawienie Estończyków na rozwój gospodarczy. Obecny poziom edukacji i stosunkowo niski poziom korupcji w tym państwie pozwala postawić hipotezę, że dystans w rozwoju gospodarczym, technologicznym i społecznym między Estonią a pozostałymi państwami postradzieckimi będzie się zwiększał.

Po rozpadzie ZSRR Estonia wykorzystała okres niestabilności politycznej Federacji Rosyjskiej i przeprowadziła dynamiczne i radykalne reformy, uniezależniając się od wpływów wschodniego sąsiada. Kiedy sytuacja w Rosji się ustabilizowała, Estonia rozpoczęła już procesy integracji politycznej i gospodarczej z Zachodem. W podobny sposób postąpiły Litwa i Łotwa. Natomiast państwa takie jak Białoruś czy Ukraina, zwlekając z reformami, znalazły się w kręgu wpływów Rosji, sukcesora polityki ZSRR.

Estonia odniosła sukces transformacyjny nie dlatego, że reformy, które przeprowadziła, miały wyjątkowy charakter, ale dlatego, że w ogóle je przeprowadziła. Była w stanie tego dokonać dzięki większemu niż w pozostałych państwach postradzieckich zaufaniu Estończyków do władz swojego państwa.

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Cytowanie

The Politics of Gender Discrimination in Nigerian Fourth Republic: A Gender Analysis

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Abstract   The vicious circle of men-women dominance in political leadership has been the major attraction of most studies on gender politics in Nigeria. Women constitute a substantial percentage of the country's population, yet they occupy a secondary place in relation to men politically, economically, socially, and culturally. This study departed markedly from this research bias and delved into the proportion of males to females in public agencies of the federal government in the Fourth Republic. The framework of analysis in this study was the Gender and Development (GAD) model which emerged in the 1990s as a grassroots-based framework. The case study research design was adopted with a qualitative approach which enabled data to be derived from a variety of sources, including documentary records and semi-structured elite interview. The findings reveal that women make up a huge population, but they are not heard politically in terms of elective and appointive positions in Nigeria due to certain structural and cultural impediments, ignorance, and poverty. The results confirmed patriarchal dominance as a reality in federal government agencies with evidence in both number and occupation of managerial leadership positions. The study, therefore, advocated investment in women administrative leadership by reserving some managerial positions exclusively for women, as well as building confidence and courage in the women to eliminate the inherent fear of male dominance. Also, government should review all discriminatory practices, the economic empowerment of women, support from family, fellow women, and media, equal representation in governance, and proper perception of women in politics.

Introduction

The global political economy in recent times has been dominated by a discourse focused around participation of women in politics, as the entire world is moving towards adopting democracy as the most acceptable form of government, in which citizens participate irrespective of their country. This discourse was informed by the incessant and continued global neglect, segregation, and marginalization of women in the political sphere of nations. The UN Generally Assembly in 2011 acknowledged the fact that "women in every part of the world continue to be largely marginalized from political sphere, practices, attitudes and gender stereotypes, low level

of education, lack of access to health care and the disproportionate effect of poverty on women". Women make up a huge population worldwide, but they are marginalized.

The neglect and marginalization of women in the political scene is worst in the developing countries of Asia, Latin America, and Africa, where women are treated like inferior creatures due to some structural and cultural constraints. Nigeria, being a developing country, has poor records of women political participation. In fact, women were nearly absent from the political sphere of the country in the First Republic established in 1963, in the Second Republic from 1979, and the aborted Third Republic from 1993. And the Nigerian Fourth Republic which was ushered in on 29 May 1999, after nearly twenty years of military rule, has witnessed women's participation in the democratization process. The present participation of women in the democratic governance, like all the previous ones, is lesser than that of men. In other words, male monopoly of power has not only continued to exist but has also become consolidated. The involvement of women in political participation in Nigeria differs in time and space (Gairoonisa, Sambo, Ibrahim, 2008).

Gender politics biases one of the prominent issues that have received global attention. Scholars, practioners and policy makers have expressed deep concern about discrimination against women and emphasized gender diversity, inclusion and balance in all spheres of human activity, in line with the Gender and Development (GAD) approach to development, as well as various declarations on human rights reinforced by the numerous global conventions on women's rights and advancement.

Nigeria subscribed to and ratified all the conventions and therefore promotes gender equality and women empowerment (Nyenke, 2004). To this end, several political, economic, and socio-cultural initiatives, as well as institutional mechanisms and reforms, have been introduced by the women's organizations (both local and international), the government and the non-governmental organizations (NGOs) to engage and encourage women to participate in governance and the development process (Aina, 2015). The National Women Policy of 2000 which was later transformed into the National Gender Policy (NGP) of 2006 which encapsulated 30% and 35%of the Affirmative Action (AA) respectively, is among the numerous government interventions aimed at mainstreaming women in governance and advancing their course in order to eliminate gender disparity. Gender mainstreaming in Ministries, Departments and Agencies (MDAs) is a cardinal requirement posed by the NGP of 2006.

In spite of these policies and programmes, there still abound bitter complaints and overt expression of dissatisfaction or discontentment voiced by women suffering the utter male dominance and sustained underrepresentation of women in positions of public trust on the one hand and low representation of women in the public service of Nigeria on the other, seemingly orchestrated by their male counterpart. There exists a social stigma which deters women from participation in the labour market (Esteve-Volart, 2004). Onyeji (2018) reports that despite the transition to democratic governance, women are yet to occupy 15% of elective positions in the country. Agbala-jobi (2010) puts women political representation in Nigeria at as low a level as 7%. *The Guardian* (2016) reports that only 24% of federal civil servants are women while a meager 14% of women hold the public sector management level positions. Adejugbe, Adejudge (2010) assert that women have low access to employment opportunities and face disadvantages in job promotion and career

advancement. For instance, during 50 years of existence, the Supreme Court of Nigeria has produced only eight female justices with only one attaining the rank of Chief Justice of Nigeria (CJN). Similarly, Usoro (2020) laments that out of 86 justices of the Court of Appeal only 23 are female representing a paltry 30% of the total number of justices of that judicial arm.

Earlier studies on gender have dwelt more on the need to invest in women leadership and have decried the poor representation of women in elective or appointive positions in the Nigerian political space and public sector. A number of studies like that of Centre for Democracy and Development (2019), have also focused extensively on the participation of women in electoral politics in terms of seeking elective offices while a few researchers investigated the ratio of women to men in the federal civil service. There is, therefore, scanty literature on the proportion of women to men and on the career progression of women in parastatal organizations or public sector agencies in Nigeria. This study departs from the research bias of the previous studies on women political participation and leadership. Its contribution to the gender literature is intended to illuminate the men-women dominance controversy as well as bridge the gap particularly in the research on the ratio of female to male managers and career progression of women in federal government agencies. It tries to establish whether women marginalization is perceived or actual and attempts to unravel the nature and extent of the marginalization as well as the circumstances that provoke it in order to show whether the marginalization is deliberate or driven by women's capacity deficits or other factors.

The study reflects the entire spectrum of Nigeria's Fourth Republic.

Statement of the research

Women constitute 50% of Nigeria's population and they are known to play vital roles as mothers, wives, time managers and community organizers. They make an essential and largely unacknowledged contribution to economic life and play a crucial role in all spheres of the society. Despite all that, women are relegated to the background and have suffered exclusion from politics (Daniel, Faith, 2013; Afonja, 1996) reported that Nigerian women have been marginalized in the formal political systems owing to traditional beliefs and practices which inhibit their advancement and participation in politics and public life. Several hurdles hinder Nigerian women's successful participation in politics. Lack of internal democracy in the political party machineries wields excessive power and displays preference for male candidates. There is large scale discrimination against women within the political parties culminating in a very few women holding offices in party decision-making structures. This manifests itself in the similar way candidates are maltreated at all levels. The established cultural practices and other constraints have restricted women's participation in politics and thus restrained them to take advantage of their numerical numbers and positions so as to significantly influence the decision making processes. As a result, the potential of the majority of the Nigerian population remains unexplored and the scope of labour, energy and human resources available for national development is restricted and wasted.

The Beijing Platform for Action obliged governments and international agencies to ensure the advancement of women in 12 critical areas, one of which was political participation. One of the political rights of the adult citizens, according to the Nigerian constitution, which also includes women, is the right to vote and be voted for which qualifies all citizens to directly participate in the national political process. However, women's low participation, underrepresentation, marginalization and subordination in politics and governance is almost a global phenomenon. Various cultural prejudices have continued to be used to undermine women's adequate and effective participation in politics. The situation in Nigeria is alarming as women are subordinated in almost all spheres of life. According to Aina (2015) cultural values that exist in Nigeria include: the subservient role of women to men, the traditional household roles of mother and wife while also contributing manual labour by working alongside the husband in agricultural endeavors, the culture of silence when men are talking, polygamy and religion, etc. This restriction is common in all the regions of Nigeria. Women thus continue to play a subservient role to men and are restricted in political activities.

This subservient role of women in the society has raised global and national concern. According to Afonja (1996), researchers and policy makers are now paying attention to women's participation in politics due to two important advances in the area of development. Firstly, several global initiatives, since the UN Declaration for women, are promoting women's participation in politics to improve the global agenda for development. Secondly, development analysts have adopted the participatory approach and are mobilizing the grassroots, including women, to plan, monitor and implement their own programmers of development in order to ensure adequate coverage, efficiency, effectiveness, and sustainability. Similar actions are undertaken by the Federal Government of Nigeria on its own through the offices of various First Ladies. These include: The Better Life Programme for Women launched in 1986 by the late Mrs Maryam Babangida, the initiation of the Family Support Programme (FSP) in 1993 by Mrs Mariam Abacha, the establishment of the National Council for Women's Societies also during the late Mrs Maryam Babangida's tenure and even the Ministry of Women Affairs. All these initiatives are geared towards the advancement of the concerns of women in Nigeria.

Democracy, as pointed out by Olowu in Afonja (1996), is about popular governance. The masses must constitute the focus of the new political culture and every effort must be made to integrate both formal and informal political structures. Women are an important part of the masses. Their development in other sectors depends on their involvement in the policy making processes for their interest to be represented, considering the fact that women constitute over 50% of the population in Nigeria. Oloyede (2017, p. 1–12) sums up the problem of less participation of women in politics in Nigeria this way: "the nation's political landscape is agog with activities. Each day, more aspirants are coming out to declare their intentions to contest the 2011 general elections. As most of the aspirations are men, this is furling the question: Where are the women in the scheme of things in the country popularly called the 'Giant of Africa'?" The women are actually available as evidenced by their population as stipulated by the 2006 census report but are however caged by cultural beliefs and practices which has made the women inactive in political activities.

Conceptual and theoretical issues

Gender is a set of variables that is socially ad culturally constructed. Gender characteristics, such as power, autonomy, rationality and activity are stereotypically associated with masculinity, while their opposite – weakness, dependence/connection, emotionality, passivity are associated with femininity.

Gender social life includes three distinct processes: assigning dualistic gender metaphors to various perceived dichotomies, appealing to this gender dualism to organize social activities, and dividing necessary social activities between different groups of humans. All these three could further be referred to as:

1. Gender symbolism,
2. Gender structure.
3. Individual gender.

Tickner (1992) contends that women seldom make it up to any top level government position in any country, but even if they do, they suffer from negative or stereotyped perception by men. She argues further that it is widely held by both men and women that the military and the foreign policy are areas of policy making the least appropriate for women and that strength, power, autonomy, independence, and rationality are typically associated with men, whereas naivety, weakness and even being unpatriotic are associated with women. Imagine an emotional woman who is the President of the United States with her finger on the nuclear button!

Brand (1998) also argues that political liberalization does not suddenly lead to state's recognition of the importance of women, but that the vast literature on the state shows that if it has long had an interest in women, in managing and controlling them, the lack of an explicit policy or institutional structure would not pose a problem notwithstanding.

Brand (1998, p. 3) also averred that: "Women's invisibility in the political process (either on the national and often the municipal and communal levels) should not be seen as lack of state interest but as deliberate policies of states, groups or institutions allied with it. For instance, in some states, as a result of domestic, economic, political or social structure, or ideology of the ruling class, and/or state legitimacy, women have persistently been excluded from politics or the public sphere".

In support of Brand, it could be argued that gender inequality in Nigeria might be the handwork of the decision makers, and unless one is able to strike at the root, propagating policy changes to uplift women would remain superficial. This is because gender is simply a way of disaggregating society into male or female.

Judging from that perspective, we could say that civil society is then not egalitarian, it does not promote welfarism, and it is gender biased. Civil society merely reflects the male biases (Basu, 2000). Ascribing lower status to women, thereby personifying subordination and exploitation, has left women de-empowered. In other words, "women belong, they do not exist" (Basu, 2000). However, all these are the effects of social norms and values perpetuated by customs and traditions.

Gender discrimination has generally been accepted to be the establishment of structures that favour and promote the progressive growth and development of men vis-à-vis women in the society

(Oloyede, 2017; Aina, 2015). The International Labour Organization (ILO) refers to discrimination as "socially constructed roles and responsibilities assigned to a particular gender" (cited in Adejugbe, Adejugbe, 2010). The structures so erected confer on or create privileges for men while inhibiting, depriving of or denying the same or similar privileges to women.

The United Nations Convention on the Elimination of all forms of Discrimination Against Women (CEDAW) describes discrimination against women as any distinction, exclusion, restriction, or preference made with the intention, purpose or effect of inhibiting, impairing or nullifying the expression, recognition, enjoyment, or exercise of human rights and fundamental freedoms of women in the political, economic, socio-cultural, civil or any other sphere of human activity. Section 452 of the amended Constitution of the Federal Republic of Nigeria (1999) explicitly opts against any form of discrimination, be it on ground of sex, ethnicity, and religion or otherwise. Any arrangement that gives rise to or promotes the existence of inequality or the absence of equality denotes discrimination.

Discrimination may be direct or indirect. Direct discrimination is the overt unequal, unfavourable or unfair treatment of persons on account of sex, race, religion, disability and so forth while indirect discrimination is implicit in the laws, policies, practices or criteria that appear, though, as neutral with equal application across board, and its outcomes are unfavourable, disadvantageous and unpalatable to a particular group (Adejugbe, Adejugbe, 2010). Thus, in spite of the numerous international, regional, sub regional and national instruments deployed against women discrimination in Nigeria, available data indicate that women still suffer deprivation in nearly all spheres of human endeavor, but more in politics, economic activities, and public service employment.

With specific reference to Nigeria, Ezeigbo (1996) expounds that the participation of women in politics together with their contribution to the political culture in Nigeria was for a long time hardly ever discussed by historians, political scientists, and the various arms of the media. The reason commonest among many is that the participation of women in politics and their contributions have remained minimal and insignificant. This minimal and insignificant participation in politics by women in Nigeria, according to her, is not the result of nature but nurture. She divides the political history of Nigeria into different phases, pre-colonial, colonial, and post-colonial. She argues that these three phases provoked changes that may have occurred in the course of the women's wielding political power. However, she puts forward the act that in the pre-colonial Nigeria, women actively participated in politics, but colonialism in the 19th century changed the role and status of women drastically from what it used to be. Brand went further to lament that:

> The system by the colonial government favored men whose political and economic advancement was pursued at the expense of women who became subsequently marginalized. Education was made available to men but unavailable to women (Brand, 1996, p. 69).

Even when women are educated, the scholarship prepared them for domestic duties, professions, such as nursing and teaching, which actually enhanced the nurturing and caring roles. In such a situation, Brand argues, women are bound to be marginalized even in contemporary political settings in Nigeria, having been totally relegated and handicapped. In a similar vein, Ashworth (1996)

concludes that in an analysis of how women have fared in their cultural and domestic setting, conservatively and progressively, the general view about women will be that of men. This problem is not only particular to Nigeria but has become today a global concern.

The African American Policy Forum (2011) also shared the same view. The above mentioned constraints, it is believed, have eroded the selfconfidence needed by women to make them available to participate in politics. However, FIDA observed that the high level of apathy, that characterized women participation in the 2011 general elections, can be mainly attributed to the above challenges. The absence of women in political debates and the decision making process distorts the appreciation of women's interests. Women's interests are not clearly articulated because male representatives and their interest groups do not possess adequate and appropriate knowledge or interest, or both.

Pre-colonial era

Politically, in the pre-colonial era, Nigerian women were an integral part of the political setup of their communities. For instance, in pre-colonial Bornu, women played active roles in the administration of the state, complementing the roles played by their male counterparts. Women also played a very significant role in the political history of ancient Zaria. The modern city of Zaria was founded in the first half of the 16th century by a woman called Quern Bakwa Turuku. She had a daughter called Amina who later succeeded her as a Queen. Queen Amina was a great and powerful warrior. She built a high wall around Zaria in order to protect the city from invasion and extended the boundaries of her territory beyond Bauchi. She made Zaria a prominent commercial centre. The story was not different in ancient Yorubaland, where Oba ruled with the assistance of a number of women referred to as female traditional chiefs. There were eight titled ladies of the highest rank. The significant role played by the prominent women such as Moremi of Ife, Emotan of Benin, and Omu Okwei of Ossamari, cannot be ignored. Moremi and Emotan were great amazons who displayed wonderful bravery and strength in the politics of Ife and Benin, respectively, while Omu Okwei dominated the commercial scene of Ossamari, i.e. in present day Delta State (Bassey, Toyo, 2003; Oloyede, 2017).

A similar tradition among the Igala of Northern Nigeria holds that the Igala kingdom was founded by a woman, Ebele Ejaunu. In other societies, however, there was much greater sex differentiation. When this sex differentiation resulted in women forming their own strong organizations, as among the Igbo and Ibibio, women controlled their own affairs and possessed political influence on the basis of their collective strength. Where such female organization was lacking, as among the Ijo, Kalabari, Efik, Edo, and Itsekiri women, their political power as a collectivity was negligible, though individual women of high status could exercise political power as a collectivity. Individual women of high status could exercise political power as a collectivity. Individual women of high status could exercise political power either through the office of the queen mother (Benin) or through their personal relationships with the male rulers. In socially stratified societies, women of high ascriptive status always occupied a higher social status position than the "commoner" men as well as women. The Yoruba wars demanded extraordinary services from both men and

women; where women were able to rise to the occasion, they were rewarded with greater political responsibility, as in case of the Egba and Ibadan Iyalode. The disturbances and dislocation in Efik and Itsekiri societies at mid-century enabled two women to wield unprecedented political power, while the Omu of Onitsha in the 1880's tried to capitalize on her office to support the new Christian religion in Onitsha. The end of the century initiated another sequence of historical events which were to affect women's political roles adversely. Pre-colonial African women occupied a position complementary, rather than subordinate, to men. As has been shown, the sex segregation which existed in many spheres of society often enabled women to control their own affairs.

Colonial period

Colonialism affected Nigerian women adversely as they were denied franchise. It was only in the 1950s that women in Southern Nigeria were given franchise. Three women were appointed into the House of Chiefs, namely Chief (Mrs) Olufunmilayo Ransome Kuti (appointed into the Western Nigeria House of Chiefs), and Chiefs (Mrs) Margaret Ekpo and (Mrs) Janet Mokelu (both appointed into the Eastern Nigeria House of Chiefs). The women's wings of political parties possessed very little functional relevance (Kolawale et al., 2013).

Post-colonial period

During this period, Nigerian women began to play very active roles. In 1960, Mrs Wuraola Esan from Western Nigeria became the first female member of the Federal Parliament. In 1961, Chief (Mrs) Margaret Ekpo contested and won the elections, becoming a member of the Eastern Nigeria House of Assembly, a post she helduntil 1966. Mrs Janet N. Mokelu and Miss Ekpo A. Young also contested elections and won, they became members of the Eastern House of Assembly. In Northern Nigeria, however, women were still denied the franchise, even after independence was regained, until 1979, that is, the return of civilian government. As a result of this denial, prominent female politicians like Hajiya Gambo Sawaba in the North could not vote and be voted for.

The Second Republic (1979–1983), saw a little more participation of women in politics. A few Nigerian women won elections into the House of Representatives at the national level and also a few women won elections into the State Houses of Assembly. During the same period, only two women were appointed Federal Ministers. They were chief (Mrs) Janet Akinrinade, Minister for Internal Affairs, and Mrs Adenike Ebun Oyagbola, Minister for National Planning. Mrs Francesca Yetunde Emmanuel was the only female Permanent Secretary (first in the Federal Ministry of Establishment and then in Federal Ministry of Health). A number of women were appointed Commissioners in the states. In 1983, Mrs Franca Afegbua became the only woman to be elected into the Senate. Also, very few women contested and won elections into the Local Government Councils during this period.

The 1990 transition elections into local governments heralding the Third Republic saw few women emerge as councilors and only one woman emerged as Chairperson of a Local Government Council in the Western part of the country. During the gubernatorial elections, no female Governor

emerged in any of the states. Only two female Deputy Governors emerged, namely Alhaja Sinatu Ojikutu of Lagos State, and Mrs Cecilia Ekpenyang of Cross River State. In the Senatorial elections held in 1992, Mrs Kofa Bucknor Akerele was the only woman who won a seat in the Senate. Veryfew women won elections into the House of Representatives. One of these few was Chief (Mrs) Florence Ita Giwa who won in the Calabar Constituency.

President Babangida's Transitional Council appointed two women in January 1993, namely Mrs Emily Aig-Imoukhuede and Mrs Laraba Dagash. In the Interim National Government of Chief Ernest Shonekan, two female ministers were appointed into the cabinet. General Abacha administration also had a number of female ministers at various times in his cabinet, including Chief (Mrs) Onikepo Akande and Ambassador Judith Attah. During the military regime of General Abdulsalami Abubakar (9 June 1998 – 29 May 1999), there were two women in the Federal Executive Council: Chief (Mrs) Onikepo Akande, Minister for Commerce, and Dr Laraba Gambo Abdullahi, Minister of Women Affairs (Kolawale et al., 2013).

A review of women representation in general elections in Nigeria in 1999

In Africa, women have neither played a significant part in the creation of the modern state system on the continent, nor have they been able to establish regular channels of access to decision makers. States' policies towards women have exhibited varying degrees of discrimination and coercion. In Nigeria, women have not been adequately represented in public and political affairs. Traces of history, right from the First Republic, has shown that women only played marginal and negligible part in politics. During the past seven military regimes, women played no significant role in the central government. The Second Republic only saw three women in the House of Representatives, and one woman in the Senate. Again, in the truncated Babangida's transition programme, only 27 women out of 1,172 state legislators nationwide were women.

The transition programme that ushered in the Fourth Republic was conducted in a hurry. Notwithstanding, women jumped and embraced it as a political group. This was the end product of the consciousness and necessity to ensure participation, changed into polity. In order to create this awareness, non-governmental organizations (NGOs) dedicated to the course of gender equality, gender activists, and civil society organizations in Nigeria took it upon themselves to run advocacy programmes and undertook training and research on affirmative action for women. Furthermore, based on the 35% affirmative action in all countries, the Nigerian women were determined to make a difference in the Fourth Republic, given a level playing ground with the men. This was also in line with the Nigeria's National Policy on Women.

To start with, the political parties formed from 1999 onwards excluded women, they were not part of the formation processes, and none featured any female prominently.

According to Simbine (2003), the three political parties generally claimed in their manifestos that they would uplift the lot of women. A manifesto is a document containing political intentions on the basis of which parties and candidates attract voters during elections (Coles, Beverly, 1991; Simbine, 2003). Based on these manifestos, women who constitute the majority of the voters, voted for parties that were ready to uplift and empower women. Although in the Fourth Republic

the story may be different, politics has become an endemic problem; hence the outage and cry by different women organizations and governments with sympathy for gender equality.

However, Simbine (2003) also observes that these political parties, for various reasons and factors, did not perform creditably. In fact, it was observed that even within the parties few positions were given to women. For instance, in the People Democratic Party (PDP) women occupied only a paltry 8% or 13% out of the sixty party positions (Simbine, 2003). Therefore, women were still not on equal footing with men.

As a consequence, it was observed that the nature of Nigeria's transition to civil rule negated the very basis of democracy as practiced in other parts of the world. The Nigerian system of transition fostered and created artificial impediments which blocked new entrants to the political process, most especially women (Brody, 2009). It is noted that the 1999 general elections had 47 million registered voters of which 27 million (57%) were women. Women membership in political parties stood at 5% in 1999; there were 7% female party executive members, and only 8% qualified as women party delegates (Brody, 2009).

The above statistics demonstrate that women formed the bulk of voters in the 1999 elections and invariably were good at voting for candidates, but not to be voted for. However, prior to the 1999 elections, there was a general clamour by women groups for the implementation of the Beijing Plan of Action and the adoption of the Affirmative Action clause, demanding that at least 30% of the positions are reserved for women at all levels (Brody, 2009). This was not to be the case in the 1999 general elections, and even at the party levels. The 30% Affirmative Actions was not met, and women were still marginalized in the first dispensation of the Fourth Republic.

Brody (2009) again observe that Nigeria's return to democracy after 16 years of military rule did not prepare citizens for the exploitation of the political elite who were inclined to alienate them from the system. Accordingly, the new political elites who have many years of experience and involvement in politics, made it ultimately clear through public utterances and actions that women should be kept at bay and not involved in mainstream politics. Aside the above factors, the growing unrest by the youth seeking consideration in the polity also militated against the incursion of woman. This, consequently, gave rise to political thuggery, violence, rigging as well as the emergence of ethnic militias, explaining why there was a low level of women participating especially in the 1999 elections. It was noted that the system of selection at the party hierarchies, which enabled women to be kept where they should belong, made possible every effort at entry into the party or going past the primaries difficult (Morrison et al., 2003).

The political context of women discrimination in Nigeria

The deprivation of women from accessing political power in Nigeria's polity is the most pervasive, frequently and extensively discussed issue in the country. Women have grudgingly expressed dismay over the unrestrained male dominance culminating in their under representation. A brief historical reflection on women political representation shows that in the First Republic the Western Region produced the first female parliamentarian in 1960 in the person of Mrs Wuaola

Esan. Between 1961 and 1966, the Eastern Region House of Assembly delivered three women representatives: Mrs Margaret Ekpo, Mrs Janet Mokelu, and Mrs Ekpo Young. The Second Republic (1979–1983) produced one woman Senator in the person of Mrs Franca Afegbua. Similarly, the Babangida Transition elections in 1992, which marked the onset of Third Republic, equally produced one female Senator, Mrs Kofo Bucknor Akerele. Available data indicate that since the return to democratic governance, women have found themselves at the rear seat in the elective and appointive political offices, occupying less than 10% of both office categories across all levels of government. A report by the African-American Policy Forum (2011) state that the Nigerian Senate has had 654 members since 1999, among them 618 men and only 36 women, which means 94.5% men to 5.5% women.

The situation seems to deteriorate in recent general elections to the extent that in 2019 only 62 women won out of 2,970 who contested both legislative and executive elective offices in the general elections (Olokor, 2019). Onyeji (2019) captures a breakdown of this figure to show that 235 women contested for senatorial seats across the country but only seven were elected, representing 6.42%, while 533 women vied for the House of Representatives seats but only 11 of them won, representing 3.05%. Similarly, out of the 275 women who served as running mates for the Deputy Governorship Office, only four were successful – one for each of the three geopolitical regions in the southern part of the country and one for the whole North. Table 1 presents detailed information on women to men ratio in the Senate at the advent of the constitutional government in 1999.

Theoretical framework

The patriarchal theory has been adopted as the theoretical framework of this study. The rationale behind this theorization is to have an insight into the subject matter of women's participation in politics in Nigeria. The issue of dominance of the male actors still remains common in the traditional or primitive societies like Nigeria, where one's birth determines the role he or she plays in society. The main actor is the man, the father and the head of the family who gives instructions and directions to the family or the entire household.

The patriarchal theory is associated with Sir Henry Maine, who in his books *Ancient law* (1861) and *Early history of institution*, proclaimed the supremacy of male actors over a group. Maine's patriarchal theory is built on the following assumptions: 1. The unit of primitive society was the family in which descent was traced through the male and in which the eldest male parent was absolutely supreme. 2. The single family broke up into more families, which held together under the head of the first family – that was an expansion into tribe. 3. An aggregation of tribes makes the state (Sofola, 1998).

However, the major preoccupation of patriarchal theory is the proclamation of the superiority of the male over the female in the family. Descent is traced through the male child who is the head of the family. He exercises absolute dominion and makes virtually all major or important decisions in the family, while the female child is relegated to the background. The right of the male child (father) is held to be his right to govern his family. In the light of this, all forms of activities,

including political activity, is spearheaded by the male child who is given more attention than the female child and is trusted and entrusted with the political power and authority to decide in the country.

Omodia (2006) observes that one could understand the socio-economic and political discrimination of the female child in families and by extension the state based on the understanding that the modern state emerged from the background where economic and political powers were entrusted into the hands of the male child rather than the female child.

The patriarchal theory creates a kind of family system that is anchored in the supremacy of the male child and the relegation of the female child. This theory is gender biased and does not give room for women liberation. The theory does not consider and accommodate the interest of the girl child or the woman as an equal stakeholder in running the activities of the family and the state. The theory is static as it does not move with time following the society which is dynamic and where things change constantly. The kinds of states we have today, antagonistic to women political participation, are a direct consequence of patriarchalism. This is because the state is a combination of families and patriarchal authorities. And the state politics becomes patriarchal, a man's affair, while the women are alienated from the political sphere. In Nigeria women are nearly absent from politics and governance due to the patriarchal nature of the country.

The data in Table 1 show an arithmetic rise of three to four women in the early years of civil rule (1999 and 2003) and a geometric increase between the years 2003 and 2007. In 2011, the number of women in the Senate dropped to seven and the trend remained stable up to 2019. Worse still, only two women held leadership positions of Senate Minority Leader (in the 8th Senate, 2015–2019) and Deputy Minority Leader (in the 9th Senate, 2019–2023), respectively, during this period.

Table 1. Women's representation in the Senate (1999–2019)

Year	Number of men	Number of women
1999	106	3
2003	105	4
2007	100	9
2011	102	7
2015	102	7
2019	102	7
Total	618	36

Source: Onyeji (2018, 2019).

Women's performance in the second chamber of the National Assembly, the House of Representatives, is equally abysmal. Out of the 2,160 members produced during the period under review, women contributed just 117 members representing approximately 5.42% while their men counterpart raked in a whopping 2,043 members which represent 94.4%. Details are contained in Table 2.

Table 2. Women representation in the House of Representatives (1999–2019)

Year	Number of men	Number of women
1999	348	12
2003	339	21
2007	335	25
2011	334	26
2015	338	22
2019	349	11
Total	2,043	117

Source: Onyeji (2018, 2019).

The data in Table 2 reveal a chequered performance of women representation in the lower chamber of the National Assembly. Beginning with a lean figure of 12 members representing 3.33% in 1999, the number increased gradually but steadily up to 2011 which was marked by the peak of 26 members amounting to 7.22%. The membership then took a downward trend to 22 in 2015 and 11 in 2019 representing 6.11% and 3.05% respectively. In this chamber, however, one woman emerged as House Speaker in 2007 but was swiftly impeached before the expiration of her tenure. Since then no female member has occupied a major office in tier.

Across the states, women have equally not enjoyed a fair share of representation in the legislative assemblies since the beginning of the Fourth Republic. Out of a total of 5,940 assembly members produced across the State Houses of Assembly, the females contributed a ridiculous 280 members which form approximately 4.71% as against an astonishing 5,660 seats representing 95.29% registered by the men. The data in Table 3 provide information on women representation across state legislatures since 1999.

Table 3. Women representation in the State Houses of Assembly (1999–2019)

Year	Number of men	Number of women
1999	966	24
2003	950	40
2007	933	57
2011	922	68
2015	939	51
2019	950	40
Total	5,660	280

Source: Onyeji (2018, 2019).

A close examination of the data in Table 3 reveals a gradual increase in the number of women representatives in the State Houses of Assembly from 24 in 1999 to a peak of 68 in 2011 which translates to 2.4%and 6.9%, respectively. Women membership then began to decline and reached 51 representing 5.2% in 2015. A further sharp decline from 51 to 40 women in the state legislative houses occurred in 2019 which Onyeji (2019) describes as the worst electoral performance of Nigerian women in almost two decades of democratic governance. Other details of these data indicate that the number of women occupying leadership positions like Speaker, Deputy Speaker, Majority Leader and so forth in the State Houses of Assembly has been appallingly negligible, amounting to less than 10%.

Women suffer a similar fate in the political executive divide as a woman is yet to win nomination as a presidential candidate in the big political parties in the country, let alone be elected President, Governor or Deputy Governor, and there are no indications that this will happen in the near future. Meanwhile, women started emerging as Deputy Governors during the military rule of the early 1990s. Two women, Alhaja Latifat Okunu and Mrs Pamela Sadauki occupied the office of Deputy Governor for Lagos and Kaduna States, respectively. During the Third Republic, again two female Deputy Governors were elected, one in Lagos State in the person of Alhaja Sinatu Ojikutu and the other in Cross River State in the person of Mrs Cecilia Ekpenyong. In the Fourth Republic, only 15 women, representing 41.7% of the national total, have occupied the office of Deputy Governor since 1999. Table 4 displays data on Deputy Governorship office with regard to women participation.

Table 4. Women holding Deputy Governorship office (1999–2019)

Year	Number of women
1999	1
2003	1
2007	1
2011	2
2015	6
2019	4
Total	15

Source: compiled by the author.

At the State level no woman was elected Governor. There were 74 women (3.07%) among the total of 2,412 contestants for this office. Of the 275 (11.40% out of 2,412) women – forming 11.40% of candidates for the Deputy Governorship four (in Enugu, Kaduna, Ogun and Rivers) have been elected, namely: Hon. Lolo Cecelia Ezeilo, Dr Hadiza Balarabe, Eng. Noimot Salako Oyedele, and Dr Ipalibo Harry Banigo, respectively, thereby making 11.11% of the total number of the elected Deputy Governors. Thus, the number of female Deputy Governors has similarly

declined from six in the 2015–2019 regimes to four. While women have consistently held the Lagos Deputy Governorship since Princess Sarah Adebisi Sosan tenure (2007–2011), All Progressive Congress winning ticket fielded a man (Ob afemi Hamzat) for the post, bucking the trend.

The content of Table 4 depicts a constant distribution for the initial three years (1999, 2003 and 2007), and an arithmetic increase from one to two in 2011. However, 2015 witnessed what could be described as a surge in the number of women Deputy Governors to six, representing 16.7% of the national total, a figure which doubled the first three years and so far has represented the peak of women performance in this position. In 2019, the number of women Deputy Governors declined to 4.

Women have also endured underrepresentation in ministerial appointments within the political executive. There was no female cabinet minister in the First Republic, while the Second Republic produced only two women ministerial slots for the Federal Executive Council (FEC). Since 1999, a total of approximately 251 cabinet ministers have emerged, out of which women have bagged approximately 44 slots representing 17.53% of the total, while men have enjoyed the lion's share of 207 in approximate numbers, representing 82.47%. Details are as presented in Table 5.

Table 5. Women representation in the Senate (1999–2019)

Year	Total number of ministers	Number of men	Number of women
1999	42	39	3
2003	48	40	8
2007	39	32	7
2011	43	30	13
2015	36	30	6
2019	43	36	7
Total	251	207	44

Source: compiled by the author.

The figures in Table 5 denote clearly a rise and fall in the number of women appointed as cabinet ministers. From three women as cabinet ministers in 1999–2003, the number increased to eight in 2003–2007, probably due to the frequent changes of the cabinet, involving split, recombination and reshuffle of ministries and ministers that characterized this period. The number of female ministers dropped to seven when the new administration assumed office in 2007. In 2011–2015, women got what could be described as an appreciable ministerial slot – a boost of 13 ministers, representing 30.2% of ministerial positions that year. The curve then fell below a half of the 2011–2015 figures in 2015–2019 and rose marginally to seven in 2019. A probe of the data further reveal that women have often got a half or less of the positions of senior or substantive minister. For instance, out of six female ministers in 2015–2019, only three were senior cabinet ministers while the remaining four were deputy ministers otherwise known as ministers of state.

Summary of the research findings

The findings obtained from this study demonstrate that women in Nigeria remain relegated in the political theatre, due to cultural beliefs and practices such as being subservient to men, being home keepers, solely raising children and observing the religious practices such as the practice of seclusion or *purdah*. Despite the fact that women have demographic superiority and the capability to participate actively in politics and positively affect the political process, they still remain inactive.

The Nigerian Independent National Electoral Commission (INEC) provided some data gathered from all the geographical zones of the country. These data demonstrate that in 1999, women held only 3% of the contested offices. In 2003, this figure rose to 4% and 5% in 2007. Only 909 females contested the elections in 2011, representing about 9.1 of the over 10,000 candidates. The breakdown of women political participation across the geopolitical zones is as follows:

South West recorded 15.5% of 2116 candidates.
South East recorded 11.9% of 1611 candidates.
South Central recorded 10.5% of 1624 candidates.
North West recorded 2.3% of 2088 candidates.
North East recorded 4.2% of 1187 candidates.
North Central recorded 8.5% of 1371 candidates.

In the same vein, findings also bear testimony that across the states, the Federal Capital Territory had the highest number of female candidates, amounting to 24%, followed by Ekiti (20.9%), Osun (20.5%), Lagos (17.8%), Kogi (1.0%), and Ebonyi (16.0%). On the contrary, Bauchi and Yobe recorded 1.1% and 0.8%, respectively while Jigawa did not record a single female candidate.

The study also revealed that across the political parties, All Progressive Grand Alliance (APAGA) had the highest number of female candidates, representing 12.2% of their total of 640 candidates. Labour party, All Nigeria People Party, Peoples Democratic Party and Congress for Progressive Change ranked next in that order with 91 women representing 11.7% of 775 candidates, 77 women representing 6.6% of 1293 candidates, 84 women representing 5.6% of 1510 candidates and 64 women representing 5.5% of 1167 candidates, respectively.

The results also revealed that Nigeria's population is estimated at 200,923,640 (Ali, 2019). Women form 49.4% of this figure, with a total of 99,180,412. However, female political representation in the 2019 elections was negligible relative to the approximately half of the population they constitute. 2,970 women were on the electoral ballot out of a total of 26,137, there by representing only 11.36% of the nominated candidates. Of this number, only 62 women were elected, a meager 4.17% of the elected officials. This represents a decline from the period of 2015–2019, when women formed 5.65% of the elected officials. A breakdown of the figure given by INEC showed that while only seven women were elected into the Senate during the 2019 elections, the House of Representatives acquired 11 women. Whereas four women were elected as Deputy Governors, 40 women were elected into the 36 state Houses of Assembly.

Women fared in the 2019 elections for the presidential ticket witnessed unprecedented increments, with six women vying for the presidential position against 67 men. They are Obiageli Ezekwesili of Allied Congress Party of Nigeria (ACPN), Angela Johnson of Alliance for a United

Nigeria (AUN), Olufunmilayo Adesanya-Davies of Mass Action Joint Alliance (MAJA), Rabia Hassan of National Action Council (NAC), Eunice Atuejide of National Interest Party (NIP), and Maimuna Maina of Nigeria People's Congress (NPC).

In 2019, 8.22% of the total presidential candidates were women. Formerly, there was a single female presidential candidate. In 2015, this was Professor Oluremi Sonaiya contesting the position with 13 men. In 2011, it was Mrs Ebiti Ndokrunning against 19 presidential candidates, and in 2007, Major Mojisola Adekunle Obasanjo. In the 2019 elections, a significantly higher number of 22 women (30.13%) were vice-presidential candidates. On the one hand, the disparity between the Presidential and vice-presidential figures could suggest female candidates were being fielded as tokens by the fringe parties. On the other hand, such a phenomenon could also represent shifting societal views on gender norms seeping into politics. Events leading up to the elections should dampen some of the positive sentiments around these figures. Specifically, all six female candidates stepped down before the national elections. Furthermore, the two leading parties did not field a woman for either position on the presidential ticket. Arguably, the most popular female candidate, Dr Oby Ezekwesili, stepped down from the ticket of the Allied Congress Party of Nigeria (ACPN), allegedly over issues of party finance. Almost immediately after her withdrawal, ACPN announced the adoption and backing of incumbent and APC candidate Muhammadu Buhari.

The study showed that from 1999 to date, no woman has been elected President or a Governor of a state in Nigeria, though a few women contested and won elections into the National Assembly and the State Assemblies. The level of female representation is still very low. This is clear in all states of the federation. In 2003, there were no female members of House of Assembly in the following states: Adamawa, Cross River, Ebonyi, Jigawa, Katsina, Kano, Kebbi, Nasarawa, Ondo, Sokoto, Yobe, and Zamfara. This shows that in all political zones of the country women are underrepresented. Subsequently, in 2007, 2011 and 2015, some women contested and won very few seats in the National Assembly and the State Assemblies. This is not enough. Women need greater representation. In 2011 only one woman contested for President, as a PDP candidate, and she could not survive the party primary where she got one vote despite the large number of women that attended the primary elections. In 2015, 5 women out of the 14 persons in total contested the Vice-President position and another 14 contested for President (Ali, 2019).

Moreover, the study revealed that the national women's political participation in Nigeria has remained 6.7% in the elective and appointive positions, which is far below the Global Average of 22.5%, Africa Regional Average of 23.4% and West Africa Sub Regional Average of 15% (Oloyede, 2017). In Nigeria, about 51% of women are involved in voting during elections. Despite these, women are still under represented in both elective and appointive positions. Available statistics revealed that overall political participation in government of Nigeria is less than 7% (Agbalaobi, 2010). However, Nigeria has been showing low level of women groups for the nation not able to meet up with the 30% affirmative action reach at Beijing.

In line with these results, prominent women leaders were mentioned in the study, like Funmilayo Ransome Kuti, a crusader and a scourge of despotic leaders, who led Egba women on a protest against taxation, Margaret Ekpo and Hajiya Gambo Sawaba, who championed the cause

of the oppressed in the northern part of Nigeria, to mention but a few. The legacies of these women are at risk of extinction. Even though an increasing number of women are finding their way into boardrooms and proving leadership for blue chip companies, the modest feats achieved by women in present day Nigeria pales into insignificance in light of the minimal participation of the preponderant population of women. In reality, women participation in decision making in Nigeria is still a far cry from the experience of Rwanda, whose economy rides to recovery on the backs of women.

The study showed the connection between participation of women, a product of economic empowerment and its effect on children, the home, and the society at large. Empowered women take adequate care of their children, ensure education of their daughters and break the vicious cycle of poverty that is to rife in Africa. It is widely reported that the Rwandan economy owes its recovery from coma to the effort of its women. Women are said to be driving that economy. With 50% of Rwanda's Parliament made up of women, Nigeria can take a clue from the Rwanda by empowering its women. Experts say women make better investment decisions than men. Empowering women with the right skills, adequate funding and timely information will no doubt enhance national productivity.

The study also revealed that women constitute over half of the world's population and contribute in vital ways to societal development. In line with global trend, Nigerian women constitute nearly half of the population of the country (Oloyede, 2017). Yet women are relegated to the background in relation to men politically, economically, socially and culturally due to certain cultural, structural, and religious abuses. This situation has engendered in recent times many studies on gender and feminism, like gender and development, feminist theorizing in political science and international relations, political economy, and other disciplines of the social science and the humanities.

The research equally brought to the fore that the Nigerian women are critical stakeholders in the political economy of the country. It is on record that women are responsible for the reproduction of the labor force and production of about 70% of the nation's food supply, but have access to less than 20% of the resources available in the agricultural sector, for instance land, or inputs and credits. They constitute less than 18% of workers in the formal sector and most of them are lower cadre staff such as the cleaners, clerical and secretarial staff (The AfricanAmerican Policy Forum – AAPF, 2011). And records show their 66% representation in contested offices as of 2007; despite they make up a huge population and are widely represented at political rallies and campaigns.

Challenges affecting women's participation in politics in Nigeria

The challenges facing women are enormous. However, researchers have shown that some of them, listed below, are likely to be responsible for the huge marginalization of Nigerian women in politics.

One of them is patriarchy. It refers to a society ruled and dominated by men, which in turn has given rise to women being looked upon as mere household wives and nonpartisans in decision making process, not to mention their coming out to vie for political positions. There is a consensus in the literature that generally in Africa, women are socialized into passive civic and political

roles in the family. This is then subsequently reinforced by the wider society based on cultural precepts that portray publicly active women as cultural deviants. In Nigeria, women political leaders are not just seen as cultural deviants, but there is very little public confidence in their capacity.

Second, Daniel and Faith (2013) observed that one reason behind limited participation of women in politics is financial burden imposed on whoever is a candidate. According to them, women have all the physical, emotional and intellectual strength to participate effectively in politics, but men still dominate the political scene because they have been on the field prior to the nation's independence, which gave them undue advantage in terms of financial strength (Morrison et al, 2007). Another reason is the economic condition of women. The economic condition of women from colonial era has always been an inhibiting factor towards the attainment of equal status with men in Nigeria, most especially in the area of politics. They say "poverty has woman's face", and the situation is made worse here in Nigeria, where in everything you do, you have to bribe your way in or out. An example is what happened in the 1999 and 2003 elections, according to Ali (2019, p. 23).

It is on record that two-thirds of poor adults who participated in the elections were women. In a situation where money decides who wins or loses the elections, the coast was therefore heavily blocked against women's active involvement in politics. The kind of money politics has always been the case in Nigeria, dating as far back as the First Republic, and has always repudiated women's efforts to enter into politics.

In another stead, there is also the problem of societal stereotype placed on women, more so on those who tried to gain equal political status with men. They have been labeled all sorts of names, some are called prostitutes with the aim that it will prevent them from having access to political power. Some are rumored to have slept with different men who already have firm grips in power, or are lured to sleep with men in power with the hope it will give them access to political power. This has often been the bane behind fewer women in politics today.

Furthermore, it is also believed by those who want to do away with women equality, that women aspiring in Nigeria to politics act in ways that contradict their culture and as such are seen as culturally deviant. This too is predicated on the general view about the role of women, which has been confined to the context of the home. i.e. that of child-bearing and carrying out domestic functions only. Thus, over the years, women have been deprived, neglected, exploited, and oppressed. And in spite of their potential, the nation has failed to mobilize them, let alone allowing their effective participation in the political process (Aina, 2015).

Writing on the mechanisms used to eliminate women who form political contest, Agbalajobi (2010) also observed that many a times, officials make open or covert allegations that female aspirants were too assertive and independent, and could not therefore be termed players. There are few examples of women who have been marginalized based on societal stereotypes. Hajiya Gambo Sawaba was beaten and incarcerated many times for her role in politics. Honorable Habiba Sabo, who was in the Bauchi State Assembly, had to deal with the contradictory situation of being *kababitsakaninrawuna* ("the headscarf among the turbans"). The implication is that women, who normally wear headscarves in Muslim Hausa society, have no business being among

the male wielders of power. In Igbo land, Onyeka Onwenu and Loreta Aniagolu were confronted with the retrogressive culture according to which women could not be leaders because they were allowed to "break *kolanuts*", a sacred rite in Igbo society (Oloyede, 2017).

Another factor hindering women's incursion into politics has been the dirty nature of Nigerian politics which has become a game of violence, thuggery, and ethnic militarism. To put it succinctly, politics in Nigeria is a "do or die" affair. Brody (2009) observed that the dirty nature of Nigerian politics also adds to low level of women participation, but aired an opinion that once politicians eschew bitterness, rancor and cheap blackmail for the purpose of scoring political points, the tread would change. Afolabi (2009) Nigerian politics, as it relates to political practice, have seen large repertoire of bad practices designed to eliminate people from the scene. Again, Oloyede (2017) noted these include godfatherism, zoning, violence and thuggery, prebendalism, and clientelism. These particularly affect women more, as they may not have access to these networks or connections to help shoot them up politically.

Equally, there has also been the issue of disorganized voter's registration; efforts were made by the political bigwigs to circumvent and discomfort the whole process to their own advantage, not to talk of the adulteration of electoral result to suit the selected candidates, as noted by Gairoonisa, and Ibrahim (2008). In its analysis of the first term of the Fourth Republic, the democratic process (…) has been fraught with pitfalls and obstacles occasioned by the principle of electoral body's (INEC) inefficiency, the behavior of politicians and party leaders left nothing to be desired of the whole process. The ruling government and its agencies selfishly designed the system for the exclusion of oppositions and they tried all they could do to avoid popular participation" (Bassey, Toyo, 2003, p. 5).

Lastly, there is still another factor – women themselves are disinterested in politics in Nigeria. However, some observers have argued that it might be caused by the very nature of Nigerian politics, as could be seen from all the earlier mentioned factors which have constituted a hindrance to women's participation in politics. Others have also argued that it might be the result of some innate reason, i.e. the imbued disdain for politics. In Nigeria, the women have never loved getting involved in politics which may result from a belief, innately imbued in them.

Conclusions and the way forward

The poor representation of women in Nigerian politics to a very large extent can be ascribed to the influence of men. It is an artificial creation of the Nigerian men who steadily keep women subjugated and marginalized in the political sphere. Women are a particular species and need to be respected and dignified politically. They make up a huge population, they constitute a substantial portion of the voters, they are seen politically but they are not heard politically in Nigeria. Their situation is a result of our contact with colonial rule, prolonged military rule, and various structural impediments. Several challenges that the Nigerian women still face in active participation in politics include discriminatory socio-cultural and religious practices, lack of finance, underrepresentation in governance, unhealthy political environment, discrimination of certain

political parties, wrong perception of women in politics, lack of family, fellow women and media support. These factors, among others, have been identified as responsible for this state of affair. Thus, the recommended measures to guarantee women active participation in politics in Nigeria include: a review of discriminatory practices, economic empowerment, support from family, fellow women and media, equal representation in governance healthy political environment, and proper perception of women in politics.

The final conclusions can be formulated in the following eight points:

1. There is need for constitutional provisions of affirmative action for women, especially the quota system. The constitutional provisions should be specific and clearly allocating at least 30% of legislative seats to women in line with the international minimum standard.

2. The constitution should oblige the political parties to introduce the quota system for women in their choice of candidates for all elective positions.

3. Legislation and policies should be adopted supporting a more gender-balanced representation of women in the elected bodies at local and regional levels.

4. The family system should be democratized, allowing a female child to decide who will become her husband and father of her children. This will give a woman a sense of belonging and integration in her community.

5. Government should provide conducive environment to encourage women's participation in decision making process of the country. This can be achieved by making sure some positions are reserved for women since they don't have the economic power, strength and education to compete with their male counterparts.

6. Elimination of all forms of abuse against women and girl child will enhance women to boost their confidence and performance in politics in Nigeria.

7. Discriminatory socio-cultural and religious practices against women's active participation in politics in Nigeria should be positively reviewed by the stakeholders (particularly the traditional/religious rulers and government) who should be educated to be gender sensitive and encouraged to protect women's political and other rights and ensure support of their political ambitions. These stakeholders should ensure that cultural/religious practices that discriminate against women are discouraged and their perpetuators are adequately punished to serve as deterrent measures.

8. Family members (especially husbands) should give the female political aspirants the relevant consent and support to venture into politics and governance. Through awareness campaign and voters education programmes, women should be informed of their political rights to participate actively in politics not only as voters but also to be voted for numerous political positions and be encouraged to support and vote for their fellow female political aspirants/politicians. Furthermore, media should support Nigerian female political aspirants/politicians by publicly projecting their positive images, emphasizing their important roles and contributions to national development, raising their participation awareness in politics and governance, deploring discrimination against them, etc. The gender stereotypes in the media should be discouraged.

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Citation

Defending the Homeland:
A Critical Assessment of Government's Response
to the Boko Haram Insurgency in Nigeria

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Abstract   Like all federal systems, Nigeria has had its own fair share of insurgencies which ranged from conflict amongst ethnic nationalities to even religious terrorism. Of course, states have no option than to ensure and assure its citizens safety and security any way and anyhow they can guarantee it. Reprisal attacks on terrorists is a mere bandage method, basically because the wound has already been inflicted, but also since ensuring security is also target hardening, and has little effect on the success or failure of a terrorist attack. Security can only minimise casualties, not prevent attacks, especially those delivered by the terrorist suicide bombers. This paper uses secondary data as a source of information and presents the results of their content analysis to explain Nigeria efforts to protect the citizens. It argues that terrorism is a violent form of insurgency that must be retorted accordingly and any policy response that does not take this into consideration is not only naïve, but also utopian. The paper, then, recommends solutions adapted to particular circumstances. While it supports negotiation with Niger-Delta militants, it objects negotiation with Boko Haram, because these groups are pursuing totally different agendas.

Introduction

Like all federal systems, Nigeria has severely suffered from insurgencies which ranged from conflicts amongst ethnic nationalities to agitation for political space and accommodation within the federal system, to even religious differences clothed in ethnic coloration. Historically, ethnic agitations have led to the formation of ethnic militias and Nigeria has played host to two types of them. The first type are the vigilante groups formed to assist the Police and authorized to arrest and prosecute robbery suspects, while the second type are the ones that started with primordial political sentiments and propagate ethnic objectives (Agara, 2008). The emergence of the second type of ethnic militia groups, such as the Odua People's Congress (OPC), Movement for the Actualization of Sovereign State of Biafra (MASSOB), the Egbesu Boys, Arewa People's Congress (APC), has led to the advent of politically motivated forms of conflicts. However, religiously motivated conflicts in Nigeria have historically taken two forms: intra-religious violence, limited to struggles within the fundamentalist and orthodox Muslims or Christians alone, and inter-religious violence, which happens between Muslims and Christians. It was on the basis of apostasy that the various intra-religious clashes occurred in the northern part of Nigeria, especially in Kano, such as the Maitatsine riot of 1980, the Bulumkutu, Jimet and Gombe battles of 1982, 1984, and 1985, the Shiite attacks of 1996 and 1997, among many others (Albert, 2004; Ukanah, 2011).

Islamic extremism has enjoyed several advantages over other competing ideologies, especially in Nigeria. First, it is readily intelligible to uneducated Muslims. It offers a set of themes, slogans and symbols that are profoundly familiar and therefore effective in mobilising support and in formulating a critique of what is wrong and a program for putting right what is wrong. Second, religious movements easily ferment under despotic or autocratic rulers who may forbid meetings and other gatherings but not public worship. As a result, it is only religious opposition groups that can have regular meetings and maintain their network outside the control of the state. Thus, as the experience of the Middle East and North Africa has shown, the more oppressive the regime, the more inadvertently it helps the rise and emergence of religious extremism by giving it a virtual monopoly of opposition. Muslim extremists can be identified as those who squarely placed the troubles of the Muslim world today at the doorstep of modernisation, those who see it as eroding authentic Islamic faith and values. For them, the remedy is to go back to the old value system, including the abolition of all laws and culture borrowed and adopted from the West. Of equal importance is that in Nigeria religious violence and terrorism have always acquired an ethnic cleansing dimension. This remains closely in line with Morgan's observation that "religion gets [easily] entangled with nationalism, ethnic pride, rebellion against colonial or neo-colonial forces. It becomes an affirmation of cultural integrity, a personal identity" (Morgan, 2001, p. xviii).

Furthermore, also of equal importance is the fact that since antiquity, religion had always been used to justify violence, war, and repression. Thus, religious violence cannot really be said to be a modern phenomenon (Agara, 2012). As a matter of fact, as Rapoport (1984, p. 659) has noted, until the 19th century, religion has provided the only justification for terrorism and it was not until 1980, as a result of the repercussions of the revolution in Iran the previous year, that the first "modern"

religious terrorist groups emerged (Hoffman, 2006, p. 85). By 1992, the number of religious terrorist groups had increased and expanded to embrace major world religions, as well as the obscure religious sects and cults. Thus, virtually all religions of the world, including Christianity, have been linked to violence at one time or the other in their history. The link between terrorism and Islam has made it mandatory to explain what Islam really is and why some of its adherents are prone to violence, and why it is used, by some, to justify modern day terrorism. As Lewis (2003, p. 3) has observed, "it is difficult to generalise about Islam", primarily because "in one sense it denotes a religion, a system of beliefs and worship; in the other, the civilisation that grew up and flourished under the aegis of that religion". Thus, the term 'Islam' denotes peace and had maintained world peace in more than fourteen centuries of history. It has not only contributed to world civilisation and development but also has billions of adherents with religious and cultural tradition of enormous diversity.

It is within this rubric that we can begin to contextualise and even begin to understand the present Boko Haram phenomenon. Although the Boko Haram movement is enjoying notoriety and its origins, purpose, and identity of its leadership are shrouded in secrecy and much confusion, its aim and ideological underpinnings are not. Thus, of all the religious violence Nigeria had ever experienced to date, the Boko Haram debacle has surpassed them all in terms of casualties and targets, commitment, reach (membership), and dexterity of its attacks.

The aim of this paper is to critically assess Nigerian government's various responses to the Boko Haram insurgency, albeit within the larger theoretical and practical frame work and policy options adopted by the experienced Western nations. We are more interested in the possible problematic contradictions and compromises which these policy responses are fraught with and which they may foist on the government. Basically, we shall refrain from making evaluative and value-laden judgment of whether such policies are good or bad, rather, our assessment will be purely theoretical. To do this, therefore, the paper has been divided into several parts. This introduction attempts to establish a theoretical base for the paper. The second section explains different types of insurgencies available for the insurgents, arguing that the choice of which type to adopt is purely that of the insurgents. The third section adopts two classificatory schemas which take a theoretical look at the various policy responses available to the government in tackling terrorism. The fourth section investigates various problems the policy responses may generate or posit for the government, using the Nigerian situation as an example. The last part offers conclusions and recommendations.

Types of insurgencies

Gurr (1988), in his typology of terrorism, has explained that insurgent terrorism aims to change political policies by direct threats or actions against the government. It attacks the *status quo*, while providing for the insurgents an extra-constitutional means of expressing grievances, whether real or imaginary, and hence theoretically, poses a threat to the political system in two ways: 1. It challenges the monopoly of force imputed to the state and control by it, and 2. in functional

terms, it is capable of interfering with, and if severe, to destroy the normal political processes of the state. In the final analysis referring to any conflict situation, whichever option or tactics is eventually chosen to prosecute the violence by insurgents, will depend on certain factors such as their anticipated goal, opportunity available to them, and the level of their fear of retribution. Thus, contemporary insurgencies have taken many, or a combination of, forms generally known as irregular or unconventional wars, such as revolution, *coup d'etat*, guerrilla war, terrorism, strikes, and riots. As Kaldor (1999, p. 107) had explained, the terms 'irregular' or 'unconventional', as opposed to 'regular' or 'conventional' wars, are often used to describe conflicts that do not take the form of mass armies engaging one another on the battlefield, or the traditional air and sea based military operations that support them. We shall now turn to a discussion of three of the most popular of these insurgency tactics or forms of violence.

Guerrilla wars

'Guerrilla' in Spanish means "small war", a form of insurgency and violence that is older than conventional war itself. In numerous instances, guerrilla war has been used as the main form of struggle whereas in other instances, it has been used as an auxiliary form of fighting, especially behind enemy's lines while the main confrontation between armies in a conventional war is taking place. In both instances, guerrilla war is a diffuse type of war, fought by a relatively inferior combatant force against a qualitatively superior and stronger enemy force. Thus, as a strategy, guerrilla warfare avoids direct, decisive battles, and instead opts for a series of protracted but small clashes and skirmishes where the insurgents' inferiority in terms of manpower, arms, and equipment can be turned to an advantage by adopting flexible hit-and-run tactics and style of fighting. The purpose and the effect of this are not only to wear down the conventional enemy's force through attrition, but also to prevent it from employing its full qualitative advantage of armaments, number of troops and equipment in the contest. Thus, guerrilla warfare employs raids, ambushes and sabotage from remote and inaccessible bases in mountains, forests, jungles or territory of neighbouring states.

Military strategists, tacticians and theoreticians have, however, argued that guerrilla warfare should only be adopted as an interim phase of a struggle. The main aim is that it should ensure the insurgents the time to build up a necessary support base and recruitment of manpower for its cause and, hence, build a regular army that will eventually win through conventional war (Mao, 1968; Lacquer, 1976). Be that as it may, insurgent groups usually resort to this mode of combat out of necessity borne out of the need to adopt the most cost-effective methods of military combat and political disruption. Today, many modern states with regular army also have troops specifically trained for irregular warfare. These soldiers are members of elite groups of warriors called 'special forces', such as the British Special Air Service (SAS) and Special Boat Squadron (SBS), the Americans Delta Force (DF), Army Green Berets and Navy SEALS (Sea, Air, and Land), and the Russians' Spetsnaz. As a result of the special training in sabotage, explosives, and selective destruction of targets, and because cruelty and brutality unmodified and unsanctioned by rules of war under which regular army operates are the enduring characteristics of irregular warfare, these elitist military groups actually qualify to be called terrorists-in-uniform.

Revolution

More than any other term, revolution has been associated with violence exerted to achieve political means and ends. However, there are two dimensions to its usage. The first connotes it as a strategy of insurgency (means) while the second implies a social or political outcome (ends). We are concerned with the first connotation and it is in this regard that revolution is associated with politically motivated violence. Conceptually precise definition of revolution is impossible but nevertheless, its understanding embodies "a deep-seated change, reflected invariably by alterations in the political fabric of society, often consummated through violence and ultimately accompanied by the production of ideology" (Leiden and Schmitt, 1968, p. 3). The term 'revolution', as Griewank (1971) has observed, entered into the political science lexicon from astronomy where it is used to mean the oscillation of a planetary body around another and returning later to its starting point. Predictably, the reactionary and conservative usage of the term became popular amongst early political scientists who were the first to adopt the term (Leiden and Schmitt, 1968, p. 4). Later, the concept of revolution as renovation and transformation into the "basic principles of good government", offered by Machiavelli, became popular (Griewank, 1971, p. 20). Marx, however, adopted the term and gave it its current meaning as a strategy for effecting violent change in a political system, when he asserted that "the next French Revolution will no longer attempt to transfer the bureaucraticmilitary apparatus from one hand to another, but to smash it" (Marx, 1975, p. 247).

However, although the orthodox Marxist prescription for a socialist revolution has been discussed elsewhere (Agara, Fayemi, 2005; Agara, 2011), the imperative to both smash and replace the socio-economic formation with a new one distinguishes a revolution from anarchy and the charge of nihilism arises primarily because of this insistence to smash and destroy the existing system. A revolution as an insurgent strategy is distinguished from a reform, primarily, because of this insistence which seems to make violence a common denominator of revolution. As Majola (1988, p. 100) has put it, "a change or development that takes place within one and the same socio-economic formation is called evolution or reform". Usually, this kind of social reform or transformation occurs when "the powers-that-be resort to eliminate current contradictions in the social economic life of a country (or to create the impression of trying to resolve them)" (Yermakova, Ratnikov, 1986, pp. 153–154). Thus, social reform implies attempt at improving the social and economic life of a country but this attempt is not underpinned by a radical change in either the class character of the society or the ownership of the means of production, or in the class composition of those who wield state power.

In contrast, social revolution refers to a radical change or transformation in "all the principal spheres of social life, such as the economy and politics (…). The principal issue as well as the main feature of (social) revolution consists in the transfer of state power from one class to another which is more progressive and advanced" (Yermakova, Ratnikov, 1986, pp. 147–148). The startling difference between a social reform and a revolution can be located in the fact that while a social reform comes as a result of intraclass struggle, a social revolution is the end result of internal contradictions between antagonistic classes, that is, interclass struggle. This is to say that no matter the scope, nature or comprehensiveness of a reform, it fails or falls short of a revolution if it does

not smash the existing *status quo* and replaces it with a qualitatively better one while at the same time resolving the issue of class antagonism and contradiction. However, as the Feierabends (1966) have noted, the presence of violence (or class struggle) in a community does not of itself mean that a revolution becomes necessarily imminent, but it does suggest that when eventually a revolution takes place, it will be accompanied by much violence.

Terrorism

According to Lenin, the purpose of terrorism is to terrorise. It is the only way a small country or people can hope to take on a great nation and have any chance of winning. Terror, therefore, becomes a "symbolic act designed to influence political behaviour by extranormal means, entailing the use or threat of violence" (Thornton, 1964, p. 73). The general contention about terrorism as a weapon of the weak (Crozier, 1960, p. 159), has now become contentious with the emergence of the phenomena of state terrorism and statesponsored terrorism. Russett et al. (2006, p. 224) have attempted to make a distinction amongst the traditional (what they refer to as "dissident") form of terrorism, state (what they refer to as "establishment") terrorism, and statesponsored terrorism. According to them, state terrorism is the use of terror by the state "against their own populations to gain or increase control through fear. Tactics (used in this case) include expulsion or exile, failure to protect some citizens from the crimes of others (as in statetolerated vigilante groups), arbitrary arrest, beatings, kidnappings (disappearances), torture and murder", while statesponsored terrorism means "international terrorist activity conducted by states or, more often, the support of terrorist groups through the provision of arms, training, safe haven, or financial backing".

The emergence and increasing instances of religiousmotivated terrorism have equally made it compulsory to differentiate between it and its political counterpart. Although both employ the use of violence, they differ in certain important respects that make it important for a better understanding of the concept. For a terrorist action to qualify as being politically motivated, it must "challenge the state but affect no private rights of innocent parties" (Kittrie, 1981, p. 300). On the other hand, religiously motivated terrorism differs from other acts of terrorism primarily because: 1. While political terrorism attempts to find a resolution within the lifetime of the perpetrators, religious terrorism outlives their participants. This is predicated on the belief that the rewards of those involved in this cause are transtemporal and the time limit of their struggle is eternity. 2. Targets of religious terrorism are not chosen for their military values but rather they are chosen for the sole purpose of making an impact on public consciousness both by its brutality and suddenness. 3. The constant recourse to a 'god' to justify their action has the power of 'satanising' the enemies while making the perpetrators of religious terrorism 'godly'. As Juergensmeyer (2004, pp. 34–38) had noted, this is a kind of "perverse performance of power meant to ennoble the perpetrators' views of the world while drawing viewers into their notions of cosmic war". The effect of this, as he had also noted, is "not so much that religion has become politicised but that politics has become religionised. Through enduring absolutism, worldly struggles have been lifted into the high proscenium of sacred battles". 4. The targets of religious terrorism and violence also have the tendency to

assume and acquire a similar religious mien, explanation, and perspective. For instance, following the 9/11 attacks, America adopted the song, "God bless America" as the country's unofficial national anthem thereby signifying a counter 'religious' phase and perspective to the antiterrorism posture of America. As a matter of fact, the then US President, George Bush, further whipped up national sentiments when he invoked the "religious image" of America's "righteous cause" as combating and bringing to an end the "absolute evil" of its enemies. 5. The "divine" nature of religious terrorism, the notion that the battle is between "good" and "bad", "truth" and "evil", the expectation of heavenly rewards for the terrorists all rule out the possibility of a compromise, negotiable truce/ceasefire or a peaceful resolution. 6. The spiritual dimension of the war makes it to go beyond the confines of human law and ideal of morality. Society's laws are subordinated and in extreme cases are deemed non-existent or inapplicable because of the recourse to a higher authority. The belief and perception here is that society's laws and limitations are of no relevance when one is obeying a higher "divine" authority. 7. Finally, the end result of religious terrorism is that it impacts a sense of redemption and dignity on the perpetrators. It is at this level that religious terrorism acquires a personal willingness on the part of the perpetrators who oftentimes are men who feel alienated and marginalised from public life.

From whichever perspective (whether religious or political) we look at it, terrorism as a strategy of insurgence involves three basic components: the perpetrator(s), the victim(s), and the target(s) of the violence (Badey, 2007, p. 1). The perpetrators are seen as fanatics, disaffected groups or minorities who employed terrorism as a tool to oppose the rule and the oppression of an established and militarily superior power (Nicholson, 2003). The victims are seen as innocent people who have no part or are directly involved in the struggle and the struggle or target may or may not be strictly political in nature. A glaring thing about terrorism is that it involves acts of violence. Violence or the threat of violence is endemic to terrorism. The violent acts need not be perpetrated before it qualifies as terrorism. Once the threat is backed with the capacity and willingness to use force or violence then the act qualifies as terrorism. Coupled with this is the fact that terrorist actions would be useless if not directed to attract attention, the attention of a specific audience in which a particular mood of fear is sought to be created. The violence of terrorism is not an end in itself. Rather violence is employed precisely to create a sense of fear, terror and uncertainty in the people who are the audience of terrorism. The fear or terror thus created or caused by terrorism is linked to the nature of the victims of terrorist attacks. In terrorist action, the victims cannot be specifically defined. Even the terrorists seem not to be able to determine or define who their victims or the numbers will be. The fact that they are only interested in maximising the impact of their attacks without regards to the victims further served to intensify the mood of fear and uncertainty precisely because anyone could be a victim. As Howe (1976, p. 14) had stated, "to qualify as a victim of a terrorist today, we need not be tyrants or their sympathisers; we need not be connected in any way with the evils the terrorist perceives; we need not belong to any particular group. We need only to be in the wrong place at the wrong time".

Theoretical underpinnings of global responses to terrorism

What can be called a global response to terrorism and championed by United States actually emerged as the aftermath of the postSeptember 11 debates about the appropriate way to understand and respond to contemporary terrorism. The recommendations emanating from the different debates have informed the focus and direction of U.S. policy response to terrorism and these has been sold to its allies and the United Nations. This global dimension has become necessary although terrorists are seen as nonstate actors, but terrorist organisations must still operate within states, their targets are often states, their objectives usually invoke changing state policies and their activities take place within the same international system in which states operate. Thus, since terrorism is a phenomenon that plays itself out in the context of the international system, then for any response to be adequate, it must also be international, taking into the consideration the totality of the systems that made up the international system. It is a form of international social conflict and so must be dealt with internationally.

Theoretically, Archibugi and Young (2002) have classified global responses to terrorism as either "statist" and/or "cosmopolitan". The cosmopolitan framework conceptualises terrorist attacks as criminal acts requiring an international, multilateral response within the context of international law and organisations. It, therefore, advocates a long term strategy that involves addressing the root causes of terrorism which it identified as including poverty, inequality, and discontent. This framework does not see terrorists' attacks as acts of war. Consequently, terrorist attacks as crimes against humanity and not merely against the state under attack, imply the establishment of an international tribunal with the authority to seek out, extradite, or arrest and try those identified as either terrorists or as having affiliation with terrorist organisations as either sympathisers or supporters. In this wise, states are expected to refrain from any unilateral and precipitous military action, but that states in the international system must create a unified international coalition that can bring terrorists to justice. Deriving from this perspective, all terrorists and their organisations will be classified as international criminal organisations and the full range of international law will be brought to bear in order to put them out of business.

The catch to this is that international legal and law enforcement agencies, such as Interpol and other institutions, are not as well developed as the domestic ones. This implies that individual state's internal law enforcement institutions will still be relied upon and their cooperation cannot be guaranteed especially in such nations which are classified as favouring terrorists and providing for them safe havens. Such nations as classified by America include Syria, Cuba, South Korea, Libya, and Afghanistan. However, according to Shimko (2008), international legal responses directed at people and organisations involved in terrorist acts are something of "a bandage approach that deals with the problem of terrorism after harm has already been done".

In advocating for the need to address the deeper causes of terrorism, the problem which the advocate of this approach has is that there is no agreement as to the cause of terrorism. However, at a more general level, the root causes of terrorism have been generally identified as including poverty, economic inequality, and a profound sense of frustration and deprivation. This is why Diamond (2002, p. 101) has offered a rather simplistic solution that "we must feed the hands that

could bite us" in order to stop terrorism. In the same vein, others have identified different root causes such as "the creation of a more peaceful and just world order [which] implies changes in political, economic and social institutions" (Archibugi, Young, 2002, p. 31). As a policy thrust, Karon (2001, p. 18) has argued that "in the long run, eliminating the root causes of terror will involve, if not complete democracy, at least allowing the citizens of [Middle Eastern] countries some voice in their governance".

Interestingly, other scholars such as Lewis (2002, 2003) have also come up with what we shall call the historical-contemporary event root cause of modern religious terrorism. Their argument is hinged on the fact that "Islam" which denotes more than fourteen centuries of history, a billion and a third people, and a religious and cultural tradition of enormous diversity, had actually been prominent and represented the leading civilisation in the world during the interlude between the decline of the ancient civilisation of Greece and Rome and the rise of modern western civilisation of Europe. Historically, the rise of European civilisation eclipsed the prominence of Islam, hence the tendency among some Muslims to see Western civilisation and all of its trappings as evil and America as its bastion. This tendency has found expressions in the many pronouncements made by Osama bin Ladin, especially in his videotape of 7 October 2001 where he alluded to the "humiliation and disgrace" that Islam has suffered for "more than eighty years".

Like every nation or religion, the Muslim peoples are aware of their history, they are shaped by it and their awareness dates back to the advent of Islam. Islam, as far back as the medieval period, developed a strong interface between it and the state with prophet Muhammed (Peace be upon him) assuming the headship of both, thereby uniting them under one inseparable authority. As Lewis (2002, 2003, p. 7) has noted, "religious truth and political power were indissolubly associated: the first sanctified the second, the second sustained the first". While the idea of a nation based on religion may seem anachronistic, it is not so to Islam and its adherents. Thus, as Lewis (2003, p. 3) has further observed, "it is difficult to generalise about Islam" primarily because "in one sense it denotes a religion, a system of belief and worship; in the other, the civilisation that grew up and flourished under the aegis of that religion". In addition to this are the fundamentals of Islam belief system which requires certain obligations from the adherents.

The corollary to the cosmopolitan approach is the statist approach which views terrorist attacks as acts and declaration of war and assumes that the most effective strategy for combating terrorism must be a universal declaration of war against terrorists and on those states that actively support or passively tolerate terrorist organisations by providing safe haven to them. Pomerantz (1998, p. 14) had voiced this opinion by saying that "the fundamental problem is that international terrorism is not only a crime. It is also, for all intents and purposes, an act of war, and [every country] needs to treat it as such". This perception of terrorist attacks as a call for arms and war against the attacked state implies significantly a more aggressive diplomatic posture and government response. This is a reminiscence of the realist school and as Krauthammer (2001, p. A21) has argued, it is not a war of choice where losing is a option, but a war that was brought directly to the attacked state's doorstep and therefore, losing is not an option. Losing is fatal. There is no time for restraint and other niceties. Once declared, the war against terrorism signifies a time for righteous might.

However, this perception that views terrorist attacks as acts of war or declaration of war is problematic because traditional wars are fought by military means and amongst states and with definite endings. War carries with it the connotation of armed conflict between and amongst states whereas the perpetrators of terrorist attacks are nonstate actors that are capable of inflicting damage like states in conventional wars. A major problem of this conception is that it brings with it policies and response that may be inappropriate to combating terrorism. Thus, the alternative is to view terrorist attacks as criminal acts, thereby leading to law enforcement strategy instead of a military model. In spite of the fact that the military model seems more popular and accepted, it basically conflicts with the law enforcement strategy.

The critical difference between cosmopolitan and statist approaches may seem conflictual and contradictory, but in actual fact the difference is more in the emphasis and general predispositions of protagonists of the two sides. For instance, while the statist would not argue against the leaders of Boko Haram being caught and brought before the courts for justice to prevail, they would rather not want international legal and organisational avenues be pursued as primarily but only as supplementary components of a military antiterrorist strategy and policy. To view legal options as substitute to war against terrorism means seriously limit the possibility of finding an end to terrorists' activities. While legal avenues and criminal justice systems may be a viable option at the domestic arena of each state, however, at the international level, the legal and criminal justice system has not been fully developed with the corresponding agencies and institutions. This failure leaves each state with no option than to go about prosecuting the war against terrorism the best way they can, that is, the military way. Even the international police system such as Interpol would need much intelligence gathering and information which remains in the hands of the national law enforcement bodies of each state that may or may not want to share it with them. The reality is that it is difficult to craft an effective global strategy against terrorism in a world of sovereign states.

Assessment of Nigerian government's responses

Military response

Nigerian government has responded to the terrorist with full force. Several attacks had been made against Boko Haram group and splinter groups. Successive government have demonstrated military capability to subdue terrorist in Nigeria. For instance, President Yaradua gave order to forcefully crossed Boko Haram as far back as 2009. This military action led to the demise of the leader of the group and arrest of scores of its members. This attack silenced the group for some years. The reemergence of the group in a tougher manner also met military response from President Jonathan who succeeded President Yaradua. He named administration's military response "Operation Lafia". Though military response in this administration was weak at initial stage due to political reasons, however, at the end of the administration we could still record laudable military achievement in combatting terrorism (Osezua, Usamotu, 2015). Recent government of President Buhari demonstrated, right from the inception of his administration, political will to fight terrorism. It is on record that he declared on the day of his inauguration shifting of military

headquarters from Abuja to Maiduguri, just to show level of commitment of the administration in combatting terrorism. Administration adopts a slogan of "Operation Lafia Dole" meaning "peace by force" (Odo, 2015). Though administration recorded laudable achievements during its first term, as terrorist were pushed back and displaced out of Sambisa Forest while some local governments occupied by the terrorist during the previous administration was recovered, peace is still elusive in the region. Persistence of security challenges from the terrorist made some analysts and concerned stakeholders to be thinking of alternatives. Could negotiation be the best option?

Negotiation response /amnesty response

In response to incessant calls from some quarters about giving Boko Haram terrorist the same treatment as the Niger Delta terrorists, President Jonathan announced his readiness to negotiate with them. He made several efforts like Ahmad Datti Committee but all were abortive (Osezua, Usamotu, 2015). President Buhari also made similar moves. He has succeeded in getting some excombats surrendering their weapons and they were given amnesty. The question is to what extent are these excombats sincere? Is it possible for a real member of Boko Haram to jettison his crusade sprit for material things? The answer is ambiguous. We argue that people are better prevented from being acquitted with extreme beliefs of Boko Haram rather that expecting a member to forsake such beliefs. And if de-radicalization process shall be done it must include well versed Islamic Scholars who can talk to the senses of such excombats. Otherwise, amnesty process similar to that of Niger Delta which is based on materialism shall produce nothing besides equipping the socalled excombats. That could also encourage other fake Boko Haram to engage in violence with intention of getting government attention.

Developmental response

There is another response from Nigerian government possible. This has to do with provision of social and economic development to Nigerians especially in the areas where Boko Haram is ravaging developmental efforts (PCNI, 2016). This response is premised on assumption that terrorism is a result of long period of abandonment of the area in the areas of socio-political and economic development (PCNI, 2016). This response is not only timely but also adequate, as solution to terrorism in Nigeria, since Nigerian terrorism is not unconnected with poverty and illiteracy. Unfortunately, like all other responses, this response is not adequately implemented. Though governments at all levels often complain about lack of resources to execute this laudable idea but the role of corruption in undermining the little efforts put in place is also significant and pathetic.

Conclusions

In the final analysis, states have no other option than to ensure and assure its citizens safety and security any way and anyhow they can guarantee it. America has been known as vowing that it will never negotiate with terrorists, but in actual fact, it has been known to negotiate in order to secure the release of some of its captured soldiers and citizens. Terrorists' attack on a state is

a violation of its territorial integrity, and the use of arms denotes such attacks as not only criminal but as a declaration of war and must be so treated. Reprisal attacks on terrorists is a mere bandage method basically because a wound has been inflicted, but also since ensuring security is also target hardening, and has little effect on the success or failure of a terrorist attack. As Stinson (1984) has opined, physical security merely reduces the probability of terrorist assaults by 15%. Security can only minimise casualties, not prevent attacks, especially with the recourse to the use of suicide bombers by terrorists.

A policy option that can be ruled out is negotiation. While negotiation is feasible with political terrorists, it is not with religious terrorists. The amnesty which was granted to the Niger-Delta militants cannot be extended to Boko Haram religious terrorists basically because they are pursuing totally different agendas. We make this assertion based on the fact that religious terrorism differs greatly from secular terrorism as they are founded on different value systems, mode of justification, and legitimacy for their actions. Their different actions, legality and legitimacy are derived from different concepts of morality, belief systems and world view. For instance, while for the secular political terrorist, terrorism becomes a means to an end, for the religious terrorist, terrorism is an end in itself. Violence, therefore, becomes a sacred instrument or means to achieve a divine duty in response to a divine imperative. The religious terrorists are not guided by any manimposed political or social imperatives, but see their acts as a sacramental duty with transcendental dimension expedients for the attainment of their goals.

This explains in part why religiously motivated acts of terrorism are more intense and claim more fatalities than the relatively less discriminating violence perpetrated by secular terrorists. Religious terrorists see themselves not as "insiders" or members of the system, but as "outsiders" seeking to effect fundamental changes in the existing order along certain doctrinal lines. Therefore, religious terrorists have a high sense of responsibility coupled with a sense of alienation that enable them to distance themselves from the victims of their atrocities and able to contemplate ever more destructive means of action. This explains the rhetoric common in the vocabulary of such demagogues denigrating and dehumanising their victims in various terms. The deliberate use of such terms not only justifies the acts of violence since the victims are not seen or regarded as human beings, but also justifies and erodes away every form of constraints on violence and emboldens the perpetrators. Thus, terrorism is a violent form of insurgency that must be retorted accordingly and any policy response that does not take this into consideration is not only naïve, but also utopian. We conclude that none of these policy options are inherently bad or good, the final choice of policy response which any government (Nigerian government included) decides to take will be a combination of many factors.

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Citation

Herders–Farmers Conflict and the Nigerian Economy 2015–2020

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Keywords:	conflict, herders-farmers conflict, Nigerian economy

Abstract This paper examines strategies implemented by the President Muhammadu Buhari's administration in order to resolve frequent clashes between herders and farmers, bearing in mind the economic implications of this violent conflict for the economy of Nigeria. The paper adopted the Human Needs Theory as its framework of analysis. The data were sourced from academic journals, internet materials, newspapers, and textbooks. The herders–farmers conflict pre-dated the Muhammadu Buhari presidency but in terms of scale and intensity of killings and wanton destruction of properties, it gained momentum during his administration. The non-verbal language of the Presidency's description of the conflict situation at the time Nigerians needed a strong comment became worrisome to the affected victims who concluded the pro-herder's sympathy stance of the President. Not until the Presidency began to take bold actions by introducing the grazing bill allowing a cattle colony of about 5,000 hectares in the states of the Federation, deployment of military personnel to the concerned states and holding stakeholders meeting across the states, Nigerians decided to unanimously join their forces with the government to tackle the herders–farmers impasse headlong. The conflict situation is no better even in the face of strategic policies implemented, however, the nation-state is trying to minimize the negative effects of the imbroglio on the agricultural sector of the country which is a huge resource to Nigeria's Gross Domestic Product (GDP).

Introduction

Conflict is an integral part of human existence and to all intents and purposes it constitutes a development process in any given society. Kegkku (2004, p. 149, cited in Nwosu, Wilson, 2004) observed that not all conflicts are harmful. Some conflicts are almost inevitable and could serve as a platform for possible resolution of a dispute that resisted all peaceful solutions. Whether this opinion is well founded or not depends on the perspective. McGregor (2014), strengthening the above view, narrowed the manifestation down to Nigeria by stating that conflict, especially that between the herdsmen and farmers, has been a recurring decimal in the Nigerian political system

and the region worst affected by it have been the north central states or what can be referred to as the Middle Belt which comprises Benue, Nassarawa, Plateau, Taraba, among others.

A report credited to SMB Intelligence and cited in Amzat et al. (2016) reveals that over 2,000 people have lost their lives to the farmers–herders' conflict across Nigeria in 2015 alone, and the numbers have been on the increase ever since then. This reality only goes to affirm the fact that the herders–farmers conflict in Nigeria has become a case too many. Concerned parties have also tried to find out the cause of this dastardly act in the Nigerian polity and some of the reasons given were ascribed to the control over land for grazing by the herders which runs contrary to the farmers who use it for farming. Herders have had to migrate southwards in search of greener pasture and water for their livestock and in the course of their movement they settle in communities blessed with their needed resources to keep their cattle alive. However, the host communities see a clear audacity of abuse and encroachment of their farmlands by the herders who also feel entitled to grazing routes alleged to have been instituted in the 1960s by the Federal Government of Nigeria (FGN). It is this boldness, that dares farmers to confront the herders and demand they vacate their farmlands for good, which always resulted into a conflict situation between the farmers and the herders.

Suffice it to mention that herders migrate southwards in search of greener pastures mostly during the dry season because a significant number of the northern region pastures would have completely run out of water and pastures. The fact, therefore, remains that just like cattle rearing is the mainstay of the herders, farming is the source of livelihood of their host communities whose farmlands they encroach during these periods. So, what can practically be done to resolve the impasse becomes a cause of concern to all interested parties, starting from the Chief Executive officers of the states that experience the conflict the most, to the affected farmers and herders involved in the conflict.

The purpose of this paper is to examine strategies and mechanisms implemented by the President Muhammadu Buhari's administration in order to resolve frequent clashes between the farmers and the herders, bearing in mind the economic implications of this violent conflict for the economy of Nigeria. To achieve this purpose, the paper has been divided into three sections. The first section introduces the research framework and discusses the research methodology. The second one examines the conceptual issues and theoretical discourse of the subject matter. The third, final section describes the government strategies applied to resolve the farmers-herders conflict, outlines the implication of this conflict for the Nigerian economy and offers conclusions.

Theoretical framework and methodology

This paper utilized secondary data and materials sourced from archival documents, textbooks, academic journals, official publications, and internet materials. The Human Needs Theory has been adopted as the framework of analysis. The Human Needs Theory was developed in the 1980s as a means to examine human behaviour and its power to evoke conflicts in society. According to Burton (1979), the act of conflict between individuals or groups stems from their quest to meet

a need they are struggling with in the society. The conflict can arise at any phase of society's life such as *security*, *identity*, *recognition*, *and development*, among others. In the face of these needs comes the urge to be in control of one's environment irrespective of the contending parties.

The significance of this theory consists in that it recognizes and legitimizes both the herdsmen's and farmers' needs in Nigeria. The needs of both these groups must be met, not the needs of one of them at the expense of the other. This helps to move the conflict from zero-sum to win-win. The abstraction of the "human needs" helps to eliminate the sense of mutually exclusive goals. Rather than fighting over the constitutional future of the grazing routes, with the mutually exclusive goals of maintenance of peace, the situation shifts to one in which both communities seek to fulfil their needs such as security, identity, recognition, and development. These needs are not satisfied at the expense of the other community, but are realized along with the other community's needs. These needs are not mutually exclusive or gained at the expense of another – they are universal.

Conceptual issues

Conflict

Conflict is an integral ingredient of the human society and is inevitable in any form of social relation in the state. The management of conflict, then, becomes the onus of government in the state where the security of lives and properties are paramount, irrespective of the situation. To put the concept of conflict into a better perspective, let's review a number of opinions on the concept by various scholars.

Hellriegel and Slocum (1996) viewed conflict as an opposition that came about as a result of don a defined goals or objectives, emotion or thoughts among interested individuals, organization or departments. This clearly shows that conflict arises when the actions of an individual or a group of individuals are intended to affect the actualization of desired goals or objectives by another person or group (Lindelow, Scott, 1989; Donohue, Kolt, 1992). According to Wilmot and Hocker (2011) conflict is a struggle on purpose between two or more individuals over perceived or real differences in values, worth, goals or the control of scarce resources. It portends a situation of threat by a party towards or against another and the desire to be in charge. This reality is manifested in the incompatible relation between the farmers and herders in the north-central region of Nigeria and virtually every other region of the country. The disagreement cut across many grounds – the control over land, cultural and linguistic differences, among others. For example, in Benue state, one of the states most seriously affected by the farmers–herders conflict in Nigeria, there are farmers, including Tiv, Idoma, Agatu and Igede, who speak a different language from the herders who are mostly Fulfulde speakers. So, there is little or no socio-cultural affinity between the two opposing parties. Olagbaju (2014) described this situation properly when he asserted that effective communication is also a tool of managing conflict, and there cannot be effective communication without language – verbal or nonverbal.

Farmers–herders conflict

The farmers–herders conflict appears quite natural; however, the context of its manifestation suggests that it is a by-product of a failed interaction process and a clash of interests of the involved parties (Stern, 1998; Akorede, 2005). This position demonstrates that the expectations and interests of farmers and herders in Nigeria are no doubt at variance and are responsible for the increasing rate of conflict situation in the country. Shadrach (2016) puts the above in a proper perspective:

> The fact that cows began to be slim meant there was no more water for them to drink and for the love of herd. The herdsmen began to work down towards central Nigeria (Middle Belt). By the time they reached Plateau, Taraba, and other Middle Belt states, they began to see fresh green grass and water.

This position described by Shadrach (2016) naturally puts the herders and farmers in a conflict situation because the *fresh green grass* are the sweats of farmers who are patiently waiting to reap their harvest and have a good reward for their labour.

Lederach (1990, cited in Mamkaa, 2018) trying to draw parallel with the farmers–herders impasse, was of the opinion that among other causes of conflict there is a feeling of entitlement that characterizes herders whenever they overrun farmlands owned by farmers and the boldness they display in defense of their actions even if it involves killing the affected farmers as the case may be. Therefore, examining these perceptions becomes important. Coser (1965, cited in Mamkaa, 2018) aptly demonstrated the potency of perception by stating that claims to scarce resources, with the goal of the opponents (in this case the herders) being to neutralize, injure or eliminate their rivals (farmers), simply tell us how dangerous perception could be and how it serves as a force of conflict.

This reality is responsible for the countless incidences of herders–farmers conflict in Nigeria and the Nigerian state is suffering from it, not to mention the number of innocent lives and properties that have been lost as a result of this impasse (Catholics Farmers…, 2020).

Theoretical discourse of herders–farmers conflict in Nigeria

Apart from the conflict between farmers and herders over the ownership of land and other scarce resources, the rate of killings and destruction of property as a result of their differences was not as frightening before as it is in today's Nigeria. Statistics concerning the herders–farmers conflict in the years 1997–2011 showed that the incidence was limited, only isolated cases were recorded in a few states such as Plateau, Nasarawa and Benue with exceptional clashes in other states. The transformation of the conflict into a serious violent situation in Nigeria that has almost turned every corner of the state into a hotbed is worrisome, given the staggering numbers of lives and properties that are lost daily as a result of the herders–farmers conflict (Higazi, 2016). This assertion was reiterated by Aluko (2017) who pointed out that the herders–farmers conflict occurred in a miniature form in the early 2000's in Nigeria, when it was confined to the north-central geopolitical zone of Nigeria and its scale of violence was small. The incidence began to rise steadily

from early 2014 on and up to the point that the Global Terrorism Index (GTI) rated the herder's militant group as the fourth deadliest terrorist group in the world (Global Terrorism Index, 2019).

Scholars and commentators have noted that the herders–farmers conflict took a different turn during the early phase of President Muhammadu Buhari's administration. Amzat et al. (2016) in their argument stated that the rate of killings that characterized the herders–farmers conflict in 2015 alone appeared to have no end in sight and was a result of negligence of duty of the security officials and the government's inability to successfully prosecute possible suspects. Omoleye and Segun (2018), on the other hand, maintain that the herders–farmers conflict gained more momentum as a result of the absence of law enforcement agencies in the rural areas as opposed to the urban centres. This clear gap in the security of lives and property of an average Nigerian is a rally point for the continuation of mindless and senseless killings by the herdsmenterrorists.

Godwin (2018) in his reflection on the destruction of properties and wanton killings of innocent farmers in Benue state by herdsmen, posited that the Benue state government appeared incapable of handling the conflict in their state and all appeal to the Federal Government of Nigeria seems to fall on deaf ears as the Benue state government was rather mandated to upturn their Anti-Open grazing bill. Oladele (2018) further supported this claim by maintaining that the Benue state government, given the herders' stance on Anti-Open grazing, puts them at loggerheads with the Federal Government whose position on reinstituting the grazing routes is clear. On this note, Abubakar and Dano (2018) were quick to point out that amidst all the setback between the Federal Government and the Benue state government, the farmers are at a lost position and the situation of their poor community is unfavorably reported by the news media.

In a rather sharp contrast to the above, Mogekwu (2011), Adisa and Adekunle (2010) and Abdulbaqi and Ariemu (2017) observed that labeling the Fulani herdsmen a terrorist group is a way of building up ethnic sentiments which in the long run could degenerate to ethnic conflict overtaking all over the country. They cautioned that herdsmen-killers should be called who they are but their operations and activities do not represent the Fulani tribe as a whole. The media were particularly appealed to since they shape public opinion of a vast number of Nigerians and the earlier the herdsmen-killers are treated in the language they understand, the better for Nigeria as a country whose image has already been battered internationally by the herders–farmers conflict.

Taking into account all the above mentioned views, an important question arises what role the President Muhammadu Buhari's administration played in confronting the herdsmen – farmers conflict in Nigeria.

Buhari's administration and the herders–farmers conflict in Nigeria

According to Nwosu (2017), the fact is that the herdsmen – farmers conflict predated the Buhari's administration, but the spike of mindless killings gained momentum during his administration and his actions and inactions in the face of the audacious conflict are meaningful. A case in point is that the Buhari's administration remained silent instead of sending a strong message against the herders–farmers conflict after the *Agatumassacre* in Benue state. Nwosu (2017) argued that

the body language of the President sent the wrong signal to Nigerians. When it was coming from the proscription of the Indigenous People of Biafra (IPOB) as a terrorist organization by the same Federal Government immediately afterwards, the Buhari administration was perceived as sympathizers with the herdsmen-killers.

Kwaja and Ademola-Adelehen (2018), lending their voice to the Buhari's administration handling the herdsmen and farmers' conflict, stated that the presidency more or less sowed the seed of distrust amongst Nigerians and, to worsen the situation, took the back seat when Kaduna state needed the comfort of the Federal Government in a reported case of herders killing and sacking the farmers community in southern Kaduna. The Kaduna state governor, Malam Nasir el-Rufia, felt betrayed by the presidency and condemned the weak position always displayed by the presidency in the case of herders–farmers violent conflict in the state.

A shocking reality, though, has been the porous border of the Nigerian state and the proliferation of small arms and light weapons. This reality has seen weapons like AK-47 and other assault rifles as common items with the herdsmen. The International Crisis Group (2018) was quick to observe that the porous nature of the Nigerian state enabled trafficking of weapons which came about as a result of the Libyan crisis. The herdsmen-killers, aside their nomadic duty, patronize arms dealers to keep up with their illegal attacks against farmers and their host communities. To be fair to the Buhari administration it should be mentioned that they have succeeded in introducing a bill before the National Assembly, known as the *Grazing Bill*, with the intention to set up grazing reserves across the states and to proactively monitor the activities of the herdsmen in the various corners of the state (Nwosu, 2017). Nigerians, on the other hand, see the Grazing Bill as a slap on the faces of the good people of Nigeria, whereby the presidency, instead of taking measures to strengthen the security in the rural areas and holding the herdsmen-killers accountable for their actions, are looking for an opportunity to reinforce the latter's hold on the people's land. This move greatly influenced Nigerian's mindset towards the president and encouraged them to affirm the rumours going round that the president displays a pro-herdsman attitude and is not disturbed by the heinous acts carried by the terrorist arm of the group.

Furthermore, the Buhari administration has been accused of poor intelligence gathering on the part of the law enforcement agency. This is attributed to the fact that the herdsmen-killers do return to communities where they had killed people and destroyed properties, yet nothing happens to them and they go with brute confidence even issuing threats to farmers who have reported their evil activities to the authorities (Omotosho, 2019). In the face of all these realities, the keen observers put forward a question what are the strategies deployed by the Buhari administration to contain the herders–farmers conflict and its impact on the economy of Nigeria.

President Muhammadu Buhari's strategies in addressing the herders–farmers conflict in Nigeria

The Buhari's administration, trying to nip in the bud the herders–farmers crisis in Nigeria, was forced to come up with possible mechanisms to tackle the menace, to provide necessary aid to those in need and restore the Nigerian polity. The strategies adopted by the Buhari's administration include:

The proposal of a cattle colony and National Livestock Transformation Plan

As a way of finding a lasting and practical solution to the herders–farmers conflict in Nigeria, the Buhari's administration came up in January 2018 with a proposal tagged *cattle colony* as a way of reducing the incessant clashes between the affected parties. The proposal was to devote about 5,000 hectares of land to herdsmen in each state of the Federation, where they would feed their cattle, reside, set up local market, educational centers, and primary health centers. The Federal Government will in turn cover the operating costs of the colony and ensure that proper documentation is maintained of all the activities undertaken in the colony. The Federal Government also vowed to ruthlessly deal with any herdsman who is not well documented in any of the cattle colony and consider them as a terrorist if caught (International Crisis Group, 2018). The states in Nigeria, Benue state leading and followed by the states in the south-western region, see the proposal as a neo-imperial penetration mechanism championed by the president to promote the enthronement of *Fulani empire*. Therefore, they strongly resist the grazing bill because it fails to satisfy other areas identified by the affected states in this attempt by the Federal Government to fairly and practically resolve the herders–farmers conflict in the country.

Adoption of security and legal actions

In the wake of the heightened security crisis brought about by the herders–farmers conflict, the Buhari administration was quick to initiate two military operations in the affected states, code named *Exercise Cat Race*, which ran for about two months in 2018 and were continued as operation *Whirl Stroke*. The police force was also strengthened and a joint partnership with local vigilante groups was established to serve as a vital resource in gathering relevant information to forestall future invasion of herders-killers into farmlands and killing innocent farmers without them facing the inevitable consequences. In spite of all these security measures undertaken, the herders still continued to kill farmers and a more effective security action became urgently needed to stop the daily spill of local farmers blood across the states of the Federation.

Dialogue and negotiations with key stakeholders

The Buhari administration, not relaxing in their oasis while innocent Nigerian farmers died silently, decided to initiate the key stakeholders' dialogue and negotiations chaired by the Vice-President, Professor Yomi Osinbajo. The participants were the Minister of internal affairs, the Security Chiefs, the Commissioners of Police of the affected states, and the victims of the herders–farmers conflict. The committee was assigned the task, among others, to think up some possible ways to resolve the herder–farmers impasse, to compensate the victims of the conflict, and to rehabilitate the affected communities that have been reduced to rubrics. The committee traveled to all the affected states and discussed their peculiar problems. A full report was submitted to the National Economic Council for further deliberation.

Comprehensive Livestock Development Plan

In order to boost the cultivation of crops and rearing of livestock in a more conducive and peaceful atmosphere, the Central Bank of Nigeria (CBN) released the sum of N100 billion (about $300 million) to the 36 states of the Federation for a harmonious livestock development plan, resolving the problems underlying the herders–farmers conflict undertaken (Kwaja, Ademola Adelehen, 2018).

Impact of the herders–farmers conflict on the Nigeria Economy

The herders–farmers conflict has negatively impacted the Nigeria's economy. It is also important to note that both the herders and farmers are integral to the survival of the economy and the quest to meet goals 1 and 2 of the Sustainable Development Goals (SDGs). The two groups are essential to the agricultural sector which the Nigerian state is trying to develop in order to diversify her economy and break it away from its overreliance on crude oil. Agriculture, then, becomes one of the best alternatives. The herders–farmers conflict, therefore, causes great disruption to agricultural production, resulting in shortage of agricultural produce in the country, and enhances import of what ordinarily it has the ability to produce.

According to CBN (2018), the herders–farmers conflict, aside from negatively impacting agricultural produce in Nigeria, has also led to farmers' poor productivity and massive discouragement of the young, able-bodied Nigerians from taking to farming out of the fear for safety. Consequently, an army of youth has also been led into cybercrime as a way out of unemployment and poverty. This reality, instead of improving the Gross Domestic Product (GDP), places Nigeria in a horrible position of enablers of internet frauds and all the related activities.

Egbuta (2018), looking at the devastating impact of the herders–farmers conflict, writes that the River Benue axis, that used to account for about 20,000 tons of grains annually, is now basking in its lost glory because the conflict has overtaken the productivity activities in this area and the best people can do now is to defend their lives and properties. A similar study conducted by Mercy Crops (2015) stated that Nigeria lost about US $13.7 billion to herders–farmers conflict and these numbers have even tripled in the year 2021.

Furthermore, the herders–farmers conflict has resulted in a steady increase in number of Internally Displaced Person's (IDPs) across the geopolitical zones of Nigeria. Farmers who survived the conflict have been resettled into holding camps as a temporary abode, pending the return of relative security to their community. The maintenance of these IDP's camps across the states of the Federation costs a fortune which, if invested in a productive sector, would rebrand the face of Nigeria and improve her economy for the general good of the citizens.

Conclusions

The herders–farmers conflict is primarily rooted in the contestation of arable land and water. The herders need these resources to keep their livestock alive, mostly during the dry seasons, while the farmers need to reap the harvest of their labour of planting on their farmlands.

The encroachment of these farmlands by the herders and the manner in which the event unfolds afterwards becomes the premise for the conflict. This paper examined the president Muhammadu Buhari's strategies for containing the menace, taking into account that the herders–farmers conflict gained more momentum in terms of escalation under his watch, and outlined the implication of this conflict for the Nigerian economy. The paper discovered that the Buhari's administration came up with a number of strategies to resolve the herders–farmers imbroglio but also observed that the same administration was tagged a *pro-herder's sympathizer* because of the non-verbal disposition of the presidency towards the alarming killings and wanton destruction of properties in the affected states of the Federation. It is on this note that the paper highlighted the economic effects of the impasse between herders and farmers. One of its major consequences is that it brings about disruption in the agricultural production and when this sector is affected in Nigeria, the nation's quest for achieving diversification of economy gets stuck. The state becomes also vulnerable to all manner of security challenges in the country because of food scarcity and other forms of agricultural constraints. To put Nigeria on the path of progress, therefore, the current administration of president Muhammadu Buhari should take steps to support the states of the Federation in their laws on grazing reserves. A legislation should also be passed to outlaw open bearing of assault rifles such as AK 47 by the herders. More importantly, the administration should further support the agricultural sector so as to liberate the country from overreliance on crude oil through friendly economic investments and offering loans to farmers both at the state and federal level. Such a move would reassure farmers of government support for farming while not totally neglecting the herders because both still remain integral to a sustainable agricultural sector in Nigeria.

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Citation

A Qualitative Study of Public Health and Policy Implications of Street Begging in Nigeria

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Abstract Regardless of the reasons for making begging a vocation, the beggars were noted as constituting a significant population in most cities of Nigeria. They are consistently becoming an interesting phenomenon in every academic discourse. This study, as a modest complement to existing academic efforts, examined the development and public health implications of street begging. It is qualitative in nature, hence the adoption of in-depth and key informant interviews as well as non-participant observation data collection approach. It covered six purposively selected areas with appreciable numbers of beggars in Abuja Federal Capital Territory (FCT). The investigated population from these settlements comprised 30 beggars, 16 staff of Ministries of Women Affairs and Social Development, Ministry of Health, 2 journalists, and 7 residents of the areas where beggars' joints were located. The data collected was treated with content analysis. The results showed that some of the beggars have been in the act for more than 3 decades. They viewed begging as a legitimate occupation rather than *a nuisance* to the society. Relative deprivation led some people to adopt street begging as a means of making a livelihood. Recurring business failure influenced the incursion into begging as *a means* of survival. The development and public health implications of street begging come in the form of environmental nuisance and health hazards, poor image of human development index in the country to the outsiders. With incessant increase in their population, consistent reduction of the percentage of productive forces becomes the order of the day. This consequently implies a breakdown in social welfare system and vulnerable socio-environmental system where unsustainability thrives.

Introduction

The phenomenon of street begging is universal (al-Shuweikh, 2020), although it is significantly higher and varied in some parts of the countries than in others (Yusuf, 2017). Begging has been in existence since time immemorial. Religious texts demonstrate the existence of begging in the early years of creation. Street begging and homelessness are often regarded as anti-social behaviour by diverse stakeholders, including the media, politicians, traders, law enforcement officers and agencies, welfare and social service providers, and the general public (Tafadzwa, Bekezela, 2014). Menka and Tarique (2014) noted that begging is a social problem which poses a challenge to urban planners. Other countries, such as Nigeria, have invested millions of dollars in education as a way of empowering its population so that they do not become beggars (Onoyase, 2010). The implication of the act of begging is that one is incapable of fending for oneself – hence the need of other's mercy for survival. Begging is an indicator of abject poverty (Seni, 2017; Ojo, Benson, 2017; Bukoye, 2015; Kennedy, Fitzpatrick, 2011). The presence of beggars is perceived to be indicative of larger social ills or issues and can cause others to avoid beggarinhabited areas (Clapper, 2012). Menka and Tarique (2014) also supported this position but added that other social ills such as stealing, violent and criminal behaviour are partial features of begging. Begging is commonly defined as an act of stopping people in the street to ask for assistance, e.g. in the form of food or money (Bose, Hwang, 2002; Collins, Blomley, 2003). It is a request directed to the rest of the society. In order to bring oneself out of misery and poverty. Ahamdi (2010) sees begging as a social problem with psychological consequences on the family members and the geographical and social structure of the urban areas.

Begging, thus, becomes a style of life for some people (Jelili, 2006) and a universal phenomenon causing highly visible socioeconomic and physical problems in most African cities. The street begging as a potential threat to the environmental, economic, and social survival of human societies is evident (Khan, Fahad, 2020; Salami, Olugbayo, 2013; Igbinovia, 1991; Aliyu, 2006). The appearance of beggars, who seem to spend most of their time in the streets and public spaces in many urban areas of Nigeria and in cities of some developing countries, has become nauseating. In the opinion of Gabriel et al. (2015), this situation was observed to be a reflection of urban complexities worldwide, which subsequently become a very common and familiar experience for a long time. In Nigeria, the population of beggars on the streets is growing rapidly. Not only have their numbers grown over the years, but their lifestyles and the display of overtly aggressive behaviour equally make them the subject of suspicion and hostility by both the public and the law enforcement agencies. Today, their presence is a serious problem that requires remedy and rehabilitation (Mesele, Addis, 2020; Gabriel, 2013).

The problem of begging is not peculiar to any part of the country. It is an urban problem noticeable in every urban centre of every country, including Nigeria. Moreover, the problem of begging is significantly higher in one part of the country than in the other. In a study carried out by Adedibu and Jelili (2011), for instance, the observed incidence of begging was reported to be about seven times that of Ibadan, while mendicancy of Enugu was observed to be one third of that of Ibadan. The general conclusion from the works by the experts on street begging is that

this practice has heavy presence in the cities. While appreciating this, it should be noted that health implications of street begging vis-à-vis the societal interactions still deserve academic attention. This is because previous studies on street begging have explored this phenomenon from the demographic (Namwata, 2012) and poverty (Adedibu, 1989) perspectives. Other research perspectives on street begging include the incidence and socio-economic dimensions (Menka, et al., 2014; Ogunkan and Fawole, 2009), the disability issues among the beggars (Tafadzwa, Bekezela, 2014), income and spending patterns (Bose and Hwang, 2002), politics and legal issues (Collins and Blomley, 2003), Islamic injunctions (Mudanssir, 2010), the package for controlling street begging and rehabilitating beggars and the physically challenged in Nigeria (Adedibu, Jelili, 2011), and the environmental and socio-economic dimensions of begging (Jelili, 2006). In spite of the all-encompassing perspective of the foregoing, the social and public health implications of street begging have not been addressed by the scholars in this field. The gap so created by the neglect of the previous scholars forms the focus of the present work, which is a qualitative study of street begging in Abuja Federal Capital Territory (FCT), Nigeria, aimed at establishing implications for the social and public health policies. To achieve this, the study examined the beggar's perception of street begging, the factors influencing the prevalence of street begging, the development and public health implications of street begging, as well as the strategies employed to combat street begging.

Methodology

Interview sessions were conducted with the street beggars found in the selected beggars' settlements in Abuja, FCT, as well as with some residents of the areas where the beggars' settlements were found. The interviews with the beggars were carried out with the assistance of a Hausa interpreter who was engaged as a field assistant in a given beggars' settlement. Those engaged in key informant interviews were the officials of the Abuja Environmental Protection Board (AEBP), National Council for the Welfare of the Destitute (NCFWD), Health and Human Services Secretariat, Social Development Secretariat, Legal Services Secretariat, and Area Council Secretariat. Also included were the officials of a NonGovernmental Organisation on Rehabilitation of the Destitute. They were included as key informants because of the nature of their official responsibilities and their extensive professional experience. Interviews were also conducted by telephone with the journalists working with the daily newspapers in Nigeria. The participants in this form of interview were selected purposively from the correspondence offices of the newspapers, however, willingness to participate was the main criterion used to select them. Participant observation was easily carried out by the members of the community, while non-participant observation was used where an event was met through convenience sampling.

A total of 6 begging points were randomly selected from the Abuja FCT. These included 1. Dutse Alhaji area, 2. Karamajiji, 3. Gwarimpa, 4. Kado, 5. Garki, and 6. Utako. These begging points were just the places where the beggars sat permanently to conduct their begging business on a daily basis. They always move away to where they could lay down their heads for the nights in places which are located near their business settlement. From each of the begging points 5 beggars were sampled, making 30 interviewees altogether. Willingness to partake

in the study was the adopted criterion of participation. From the areas where the begging points were selected, involved in the interview sessions were also 7 residents, 16 officials from the Ministries, and 2 journalists (correspondents) of the daily Abuja newspapers. Content analysis was carried out of the information obtained from the in-depth interviews and documented in the observations. This involved direct extraction of information provided in the in-depth interviews. Verbatim quotations were utilized to illustrate some issues being discussed.

Results

Background information about the street beggars

In the course of this study 75 participants in total were interviewed: 50 beggars that cut across different tribes, religions, ethnicities, races, sexes, and ideology, selected from various areas in Abuja FCT, 16 staff members of Ministry of Women Affairs and Social Development and of Ministry of Health, 2 Journalists, and 7 residents of the areas where beggars' joints were located. From among the interviewed beggars of Hausa and Yoruba stocks 10 could communicate in English and their local languages, 14 of them spoke pidgin and their local languages, 26 beggars understood only their local languages. Responses from the third category of beggars were achieved with the assistance of a Hausa interpreter who understood both English and Hausa languages. The Yoruba respondents among them were directly interviewed by the researcher in his mother tongue (provided they were willing to give information about their attitudes towards and perception of street begging as some of them were feeling shy). From among the 50 interviewed beggars 36 were female aged 9 to 60, 3 of them, aged 15 to 25, could speak English, 5 spoke pidgin, and 28 spoke Hausa only. There were 21 men aged 12 to 70 years, 7 of them spoke English, 9 used, pidgin and 5 understand only the Hausa language. There was joy visible in the faces of those who could communicate in languages other than their mother tongues.

Social and public health implications of the street beggars' perception of street begging

Every individual will want to play safe in any situation. Beggars in their own perception have a strong belief that they are choosing the right option to cater for their needs. Beggars view begging as a means of survival instead of involving themselves in illegal business and becoming hazardous to the society. Beggars are of the belief that begging is better than stealing. One of the beggars stressed further that "some of the thieves took to stealing as a result of poverty and deprivation, with other option available some wouldn't have taken to this. There are people among them who feel begging is too disgusting for them to venture into. Since stealing is usually done in the dark that will not be disgusting to them, but in my case, I will continue to beg for my needs till the time God will ask me to stop through the provision of a better source of income. So, to me, begging is still honourable when compared to stealing" (Female IDI/Beggar/48 years old/Dutse Alhaji, Abuja FCT, Nigeria).

Another beggar Said: "I met my parents in this begging activities, I was told that I was born into this means of livelihood. I don't know of any other means of making a living than begging, hence my foray into it. For the past 33 years that I have been begging for living, I have stayed in cities like Kaduna, Kano, Ibadan, Ilorin, and Lagos. I have never felt disturbed in the act of begging for living. I left Lagos for Abuja FCT because of rowdy nature of Lagos and that life there is full of risk" (Male IDI/Beggar/59 years old/Garki, Abuja FCT, Nigeria). Corroborating this further, another beggar said: "One of my uncles took to begging in his lifetime. Before his death he was always telling us stories about big cities like Kano, Kaduna, Lagos, Ibadan, etc. The excitement of lifestyles in the cities and what it means to be in the cities has ever remained irresistible to me. Then I believe it is only the act of begging that my uncle took to was what afforded him this opportunity. I then decided that I will take into begging so that I can achieve my desire for adventures just like my late uncle. Since my incursion into street begging I have surpassed my Uncle in terms of travelling in the course of begging. I have been to Kano, Kaduna, Lagos, Port-Harcourt, Benin City, Enugu, Onitsha, Awka, Akure, Abeokuta, and lastly Abuja FCT which I found more accommodating" (Male IDI/Beggar/33 years old/Gwarimpa, Abuja FCT, Nigeria).

According to the words of another participant "street begging is normal if it is not turned into business venture. It is good to seek for help, most especially for the physically challenged ones like for immediate needs only. While it is a fact that Muslims are expected to give food to the poor and to offer the one who asks for something. However, professional begging is seeing as impairing human honor and virtue, shatters personality and leads to the exploitation of benevolent people's pure feelings" (Female IDI/Beggar/62 years old/Maitama, Abuja FCT, Nigeria). Still another participant saw begging as the modest form of letting the society know about the difficulties some people are facing. In his words, "everybody will be pretending as if things are normal, however, it is not. If I have enough (money) that can sustain me why will I need to take to begging? But begging becomes a necessity in the absence of nothing to rely on for sustenance" (Male IDI/Beggar/45 years old/Kado, Abuja FCT, Nigeria). It was equally revealed that "some people have the money to give out to the needy but there is no means of identifying the needy. It is only those on the street begging for living that these people can easily identify and assist. If they refused to come out and beg for help it means inability of the rich to have people to assist and denial of avenue for redistribution of societal wealth that will help to douse socio-economic tensions (Female IDI/Beggar/39 years old/Karamajiji, Abuja FCT, Nigeria).

Factors influencing the prevalence of street begging

Increasing incidence of street begging in Abuja FCT is connected to the socioeconomic reality and environmental conditions bedeviling people. Generally, the problem of street beggars and begging activities cannot be related to a single cause or one factor. Instead, it is a multi-dimensional cause, a combination of factors that often leads to an individual beggar's ending up in the street. One beggar at Utako, Abuja FCT, revealed that after the death of his father, his mother could not cater for them and he resorted to begging to cater for the family with a hope that all will be well. According

to his words, "my mother had given birth to six of us. I am the secondlast child. Our mother could not afford to meet our family's basic needs such as food, clothes, and some other domestic needs. With nonchalant attitude of our relatives about our welfare, I and my other brothers have no option but to take to begging as a way to support the family instead of joining bad gang or stealing" (Male IDI/Beggar/42 years old/Utako, Abuja FCT, Nigeria).

Another participant noted: "I became neglected because my mother got married to another man after my father's death. The burden became unbearable when my mother's new husband handed me over to somebody as a servant. I took to begging for my upkeep because the proceeds from services I was rendering to my master goes to my mother's husband and the man was working me to death. I was still serving the man but moved around in the night to beg to feed myself. I have been on the street since I was barely eight years old. Although it has not been so easy, I manage to feed myself every time. Begging thus becomes viable alternative to stealing because I make money daily. I have trained myself not to take whatever insults coming from people into cognizance. I have witnessed lots of insults and abusive language but I pretend as if I do not understand because what actually matters to me is what I received from begging" (Male IDI/Beggar/51 years old/Wuse Zone 2, Abuja FCT, Nigeria).

In another submission, a beggar noted: "I took my begging to the street when opportunity of having daily three square meals became difficult. Begging became a matter of necessity due to displacement caused by religious conflicts in the north-eastern part of the country. Everybody has to abandon all our possessions including the farmland, with difficulty in the camps where we were housed. I had no option than to take to begging. This town is the third I have visited since I left the (IDP) camp 6 years ago (2014)" (Male IDI/Beggar/67 years old/Karamajiji, Abuja FCT, Nigeria). Another participant said: " there is no business I ventured into without running into debts. I have tried all sorts of businesses without success. The heavy indebtedness forced me to leave home. None of my people knows where I am presently. I refused to communicate home because of the fear that my whereabouts may be made known to my debtors. Having arrived Abuja, I could not venture into trading again and I don't have the energy to take to carrying load (*mai kaya*). Begging thus remains the available option for me" (Male IDI/Beggar/42 years old/Garki, Abuja FCT, Nigeria).

Another beggar revealed: "I don't have helpers or benefactors. I lost my parents in Maitatsine religious crises (of 1980s), since then I have been making ends meet in the beggars' world. I started in the beggars' world by guiding a blind beggar around in the course of street begging at tender age of 5 years. When the beggar became too feeble to cope, he returned back to his hometown in Nguru (Yobe State). I have guided up to 5 blind beggars before I decided to operate alone as a beggar. I have been in this business for more than 4 decades" (Male IDI/Beggar/54 years old/Dutse Alhaji, Abuja FCT, Nigeria). The difficulty in making ends meet during dry season explains why another participant ventured into begging as a supplement. He said: "I take to begging during off-farming season and return back to farm during farming season annually. I always use the proceeds from begging to buy necessary implements for farming and the remaining to take care of myself and my family" (Male IDI/Beggar/65 years old/Wuse Zone 2, Abuja FCT, Nigeria). Insight into physical capability as a causal factor was equally stressed. One beggar explained: "My physique is

a disadvantage. In what ways do you think I can be useful to myself? I am not physically balanced and I was not trained in any form of skills and life must continue. As an individual that detests crime in whatever form, no option is opened to me other than begging for what I need for survival with physical disability" (Female IDI/Beggar/41years old/Gwagwalada, Abuja FCT, Nigeria).

It was also stressed that "people come to beggars joint with food prepared inside the takea-way packs, people do come with food items like *kosai* (bean cake). By nature of their appearance, the patrons cut across the poor, the rich, and not-very-rich, which implies that their needs and rationale for what they are giving out vary" (Male IDI/Trader at Dutse Alhaji/56 years old, Abuja FCT, Nigeria). Medical condition as a factor was adduced by another participant: „I could see that majority of them took to begging because of medical challenge. Truly. some of them are not able in terms of physical strength. However, I still believe that there are things they could do for living rather than street begging but since they have chosen to take to begging there is nothing one can do about it" (Female IDI/Trader at Garki/41 years old, Abuja FCT, Nigeria).

Development and public health implications of street begging

The problem of begging is a social menace which has a negative implications not only for economies of the cities, social and physical environment but also for beggars themselves. The increasing population of beggars in Nigerian cities constitutes an eyesore for its environmental nuisance and health hazards, particularly carrying infectious and contagious diseases. The specific implications, according to one of the participants, are as follows: "Begging has serious implication for the city and national economy because beggars are not economically productive, they contribute nothing to the economy but succeeded in reducing the number of capable hands that would have brought about sustainable development. Their increasing numbers leads to nothing but social relegation of the city as well as stigmatization of the society where they are fund" (Male KII/Official of Health and Human Services Secretariat, Abuja FCT, Nigeria).

It was also stressed that "beggars represent a social threat to the society, especially in the cities. They portray a bad image to outsiders or strangers, while some criminals hid under the guise of beggars to perpetuate their evil deeds. They are at times used as instruments by mischief makers, who use them to vandalize public properties and utilities built with nation's resources. The nefarious activities of those fake beggars, such as criminals, area boys and thugs, constitute one of the sources of civil unrest to the city dwellers" (Female IDI/Trader/56 years old/Resident of Maitama, Abuja FCT, Nigeria). Another submission showed that "the city and national economy become retarded with considerable proportion of beggars' population. Certain population of beggars is often perpetually sick. These ones always suffer from diseases, like cancerous growths on visible parts of their bodies, which they wear like a badge of honour as means of arousing sympathy and legitimatizing their acts in trade" (Male KII/Official of a Non-Governmental Organisation on Rehabilitation of Destitute, Abuja FCT, Nigeria).

It was stressed further that "at most strategic roads, many (beggars) with some form of diseases are carried and put at the centre of the road with men and women with bowls in their hands

soliciting for help. They are controlled by godfathers who are entitled to a 'cut' of their money in return for 'protection'. The godfathers are also responsible for costuming, i.e. fake wounds on appropriate parts of your body; for the lame, wheelchairs, wheelbarrows or skateboards; for the blind, a child to lead you around and collect the day's earnings; and for young women, malnourished looking" (Female KII/Official of Health and Human Services Secretariat, Abuja FCT, Nigeria). Further clarification went as follows: "The mere visibility of these beggars on our street in recent time is becoming a nuisance, street begging is gradually becoming a potential threat to our societal fabric and eroding the idea of self-reliance in our nation. This is because begging is no longer limited to people who in one way or the other had physical challenges and are not capable of working to fend for themselves. Many young and energetic people now see begging as the most convenient and surest way of getting money instead of working to cater for themselves" (Female KII/Official of National Council for the Welfare of the Destitute (NCFWD), Abuja FCT, Nigeria).

Complementing the foregoing, another participant revealed in his interview that "street begging has brought about dependency syndrome on beggars because as soon as they get used to going out and getting what they need for their livelihood, then the question of thinking along the line of being useful to themselves and the society does not arise. When such people progress in life they will find it difficult to do any lawful trade or engage in any activity that can fetch them some money, then the obvious thing for them is fall prey to drug addiction in order to ward away frustration or else they join gangs of armed robbers, thefts, arsonists or religious misguided fanatics and this do not augur well for our national development" (Male KII/Official of Social Development Secretariat, Abuja FCT, Nigeria). It was also stressed that "beggars are constituting a health hazard, which does not speak well about the nation, the squalors where beggars usually stay are always vulnerable to outbreak of epidemics and such disease is likely to spread to the larger community. The fear is this, communicable disease such as tuberculosis could spread through such places. With such occurrence, it is usually difficult for the appropriate authority to render necessary medical assistance to them since they are always wandering about (Male KII/Official of Abuja Environmental Protection Board (AEBP), Abuja FCT, Nigeria).

Another perspective revealed that "harsh weather conditions, including sunburn and colds during nights, are some of the challenges beggars experience on constant basis. This makes them vulnerable to illness. In some of our interactions with these beggars it was obvious that unhealthy urban environment in which these beggars live remains a major cause of health problems among them. Illnesses which beggars had suffered while begging on the streets includes malaria, diarrhea, coughing, and other respiratory diseases" (Female IDI/Resident of Maitama, Abuja FCT, Nigeria). Further information asserted that "adverse weather conditions are unfavorable and associated with airborne diseases, including flu, cough, only to mention a few. Unhealthy lifestyles or behaviour might have direct or indirect consequences in the health and wellbeing of individual causing restlessness, accidents, and untimely deaths among others" (Male KII/Official of Health and Human Services Secretariat, Abuja FCT, Nigeria). Another participant revealed that "harassment from fellow beggars is not left out, they sometimes fight over spaces. Security agencies' harassment

is another area of concern, this often is sequel to the fact that there are restricted areas where beggars are banned from entering. In an attempt to seek for help and beg for alms, many of them ignorantly trespass into those areas. The only option available is for the security agents to swing into action through prompt and often temporary detention to serve as deterrence to others" (Male IDI/Resident of Utako/62 years old, Abuja FCT, Nigeria).

It was also noted that "most often the female beggars are exposed to sexual abuse. As a result of this, some of them have been identified as victims of HIV/AIDS. The chances of contracting AIDS and other Sexually Transmitted Diseases are much higher for this set of people. As a consequence, those in this business and the rest of the population are at risk. Since women and young girls are the most vulnerable, chances are that they end up in unplanned pregnancies, as seen in the case of most female beggars across Abuja FCT. It was also observed that beggars among themselves are multiplying reproductively (unprotected sex resulting in pregnancy among other consequences) due to their exposure (nakedness) to one another even in the open or public hiding places they chose as home as a result of homelessness" (Male KII/Official of Social Development Secretariat, Abuja FCT, Nigeria). Another argument revealed that "increasing cases of most distressing and inhuman acts of trafficking in woman and children in the recent times have placed many beggars on the streets at risk of being kidnapped and forced into the prostitution by individuals. It has also been noticed that most male victims of kidnappers are ending up as instruments in the hands of criminals and robbers, while some fall victims of rituals" (Male KII/Official of Legal Services Secretariat, Abuja FCT, Nigeria).

It was also noted that "some of these beggars are into this business for long period of time, some were born into the business, and interactions with them and also documented information from researches on street begging have shown that if these people are unable to beg or prevented from begging, either by law or government policy, they would resort to illegal activities. The commonest crime being eyed by the beggars in the absence of opportunity for begging include workshop lifting, selling of Indian hemp, among other criminal activities. So, it is apparent that unsuspecting beggars are likely victims of illegal drug trafficking due to promises of better life by group of traffickers" (Male KII/Official of Area Council Secretariat, Abuja FCT, Nigeria). Further submission revealed that "street begging could be risky to life, especially in an area where there is heavy traffic, in areas like Zuba-Kubwa highway, Wuse, Jabi, Gwarimpa, Garki, and in other parts of Abuja. Beggars risk being run over by careless drivers. It is not unlikely that beggars constitute a great percentage of corpses occasionally found on the highways in Nigeria. Some beggars migrate from far and near places to settle down for begging in an area where they drew sympathy from people either through religion, cultural or ethnics beliefs. They migrate mostly in rickety vehicles or through trekking which mostly results in the accidents. Larger percentage of such victims remains unattended to because nobody was ready to take responsibility for the hospital bill and other expenses" (Female KII/Official of Social Development Secretariat of the FCT (Public Health Unit), Abuja FCT, Nigeria).

Strategies employed to combat street begging

The reality of antithetical stance of street begging has made the stakeholders to embark on several approaches to curb its devastating effect. These approaches are similar in certain instances and varied in another, but all were aimed at eliminating street begging and its negative effect on social and economic development of the society. For example, a participant in the study revealed that "in Lagos State, a rehabilitation centre was established at Majidun in Ikorodu and Karama-jiji disability colony, as well as Bwari Rehabilitation Centre in Abuja FCT, where the destitute were being kept. However, information has it that beggars were taken to rehabilitation homes not to take care of them but just to get rid of them from the street. The former President Goodluck Ebele Jonathan rolled out the 64 newly completed and furnished Almajiri Model Schools in 2013 across the states of Adamawa, Borno, Gombe, Bauchi, Yobe, Jigawa, Kaduna, Sokoto, Zamfara, Kebbi, Oyo, Osun, Lagos, Ondo, Ekiti, Edo, Rivers, Kogi, Niger, Katsina, Taraba, and Nasarawa states in order to address the out-of-school children syndrome that is also impeding the growth of the economy. Barely three years after, the *almajiris* (out of school child beggers) abandoned the schools and went back to the streets in search of free money despite the federal government intervention. In spite of the economic recession and the outcome of previous efforts, government is not resting on its oars on the need to take these beggars off the road again" (Male KII/Official of Abuja Environmental Protection Board (AEBP), Abuja FCT, Nigeria).

Specific contribution of the non-governmental organisations (NGOs) on this matter were equally stressed: "Pockets of non-governmental organisations are equally trying to assist these beggars, but funding capacity of some of them could not permit total removal of these people from the street without the support of the governments. So, the role of NGOs in this case is utterly limited to provision of basic needs, which cut across issues of health talk, basic healthcare services, and clothing etc." (Male KII/Official of Abuja Environmental Protection Board (AEBP), Abuja FCT, Nigeria). Using his experience of stark reality in contemporary rehabilitation homes in the country, another participant pointed out that "the existing rehabilitation homes in Nigeria are mockery and insult to human dignity because they lack basic necessities of life and therefore do not implement any an effective strategy for curbing street begging. The rehabilitation processes in Lagos State took another dimension where Lagos State government tried to reconcile the destitute with their families by sending social workers to their states of origin to trace their homes before sending them back. And this has yielded some results because substantial proportions of the beggars have been sent Home" (Male KII/Official of National Council for the Welfare of the Destitute (NCFWD), Abuja FCT, Nigeria).

According to the words of another participant, "state governments in Northern part of the country have tried to use the specific peculiarity of their environment to deal with the issue of street begging within their enclaves. For instance, Kano State government anchored its strategy of dealing with street begging on provision of food for students in the Islamic Schools. This was pilot tested in three local government areas, namely Warawa, Makoda and Ajingi, for a period of one year. The effect of this was reported by scholars to have brought to an end the cases of street begging among children in these local government areas" (Female KII/Journalist (Daily

Newspaper Correspondent), Abuja FCT, Nigeria). It was also noted that „the strategy of dealing with street begging by Jigawa State government was centred on reducing poverty to the barest minimum. Just as it has been widely reported by the mass media, Jigawa State government has the vision of putting in place a social welfare programme of N7,000 monthly survival allowance for the physically disabled in the state to alleviate their plight and keep them off the street" (Male KII/Journalist (Daily Newspaper Correspondent), Abuja FCT, Nigeria). Another participant revealed that "the federal government has at one time or the other sent law enforcement agents to rid the streets of beggars and kept them in the existing rehabilitation centres. Some state governments have followed suit. In May 2007, the Kwara State government under the leadership of Dr Bukola Saraki banned street begging and applied N5, 000 or three months' imprisonment or both as the case may be as penalty for breaking the law. In some states where these beggars are seen freely moving round, there are always specific areas (like Government Reservation Areas/Estates) they are forbidden to enter" (Female KII/Journalist (Daily Newspaper Correspondent), Abuja FCT, Nigeria).

Issues and events noted through observation

Street beggars, including children, the aged, women and men, the disabled, are conspicuous in the streets and public areas begging for alms. Some beggars are blind, some are crippled, deaf/dumb, but there are also beggars without physical disability. They cut across both genders but female beggars, children and adolescent beggars were in sizeable proportion in the study settings. They are mostly between 5–45 years of age, they regularly move in groups of 5–10 with plates or bowls in hands, having un-kept hair, blistered lips, dirty fingers, bare and broken feet, tattered clothes. Common beggars have locations where they resume daily, they are always prompt and punctual, they set out to city centres early before workers set out for economic transactions of the day.

Different categories of beggars are conspicuous in motor parks, religious worship areas, markets, road intersections, venues of ceremonies, among other public places. Many of them were discovered to have migrated from neighbouring countries. The highest incidence of street begging tended to be in the early part of the morning and from late morning to early afternoon, when commuters were in less of a hurry to get to work or return home after a long working day. The beggars in some areas have devised the system of moving round the metropolis in the morning and coming back to converge at places identified as safe haven in the evening to evade harassment of the law enforcement agents as well as that of the Federal Capital Territory administration. The beggars joints are always littered with nylon and papers of what they consumed over the day. Items given to the beggars are not limited to money, they also include food items, such as rice packed in disposable take-away containers. Food items are sometimes presented inside black nylon, gifts presented occasionally include salt and granulated sugar packed in nylon bags.

Discussion

The findings from this study reveal that beggars spend most of their time in the streets and public spaces in many urban areas of Nigeria and in cities of some developing countries, that their constant

appearance in public places is fast becoming nauseating, and that this situation is a reflection of urban complexities worldwide. Our findings totally corroborated the position of Gabriel et al. (2015). These findings also aligned with the views of some previous scholars who maintained that the menace of street begging as a potential threat to the environmental, economic, and social survival of human societies is evident (Igbinovia, 1991; Aliyu, 2006), that the people who engaged in begging recognized it to be a "problem", due to its harsh, humiliating, and frustrating nature (Lynch, 2005). In a similar vein as Jelili (2006), this study discovered that begging has become a global phenomenon which threatens the environment, economic and social survival of humanity. Other points of meeting between the existing literature and the findings of this study is that different categories of beggars are conspicuous in motor parks, religious worship areas, markets, road intersections, venues of ceremonies, among other public places (Jelili, 2006), that the problem of begging was attributed to a number of factors such as poverty (Jelili, 2006; Adedibu, 1989), religion (Hanchao, 1999), physical disability (Jelili, 2006; Adedibu, 1989), and culture (Jelili, 2006). Poverty and physical disability were the most visible factors responsible for street begging in Nigeria (Hanchao, 1999). Therefore, in order to meet their basic needs, some of the poverty-stricken people resort to begging as the sole means of livelihood. Also, it is empirically evidenced that physically disabled people constitute the bulk of the identified beggars in Nigeria (Ogunkan, 2009; Jelili, 2006).

Rapid urbanization and high density of the Nigerian population have caused problems such as suburbanization, hidden unemployment, false jobs, and the development of social problems such as begging in city environments. Since slum dwellers, rural migrants and some refugees are mostly poor and unemployed, some of them make a living by engaging in illegal activities such as theft or smuggling, while some others who suffer from severe fanatical poverty resort to begging. As the population of those involved in begging in the streets continues to be on the increase, the country begins to lose a number of people who otherwise would have contributed to its economic development. This is because they are not economically productive and contribute nothing to the country's economy. As a result of this, the national economy becomes slow in developmental processes because a considerable proportion of beggars are not economically productive in any possible way, thereby depending on the already overstretched workforce. They rather become nuisance to the society by causing discomfort on major roads and in other public places. They obstruct traffic and human free flow and also generate dirty materials – either as waste or as part of their belongings – in their regular routes and stations. Abuja, being the Federal Capital of Nigeria, has the role of showcasing the inherent beauty of the country. It is therefore supposed to be kept clean, made free from all maladies but is faced with the problem of street beggars. The beggars show bad images to outsiders and strangers, especially private investors. They are at times used by politicians as instruments to vandalize public properties and utilities built with nation's resources without realizing the outcomes of such acts.

"Poverty" as one of the factors that pushed people into begging and the rate of its occurrence was exposed in several studies which showed the perpetuation of poverty in various communities and the eventual transformation of poverty into a kind of subculture. Evidence of this emanated

from the statement of one of the beggars that he was born into the act of begging. Others narrated that their relations made them took to begging at one point in time. The implication of this is that the poor have ended up being trapped by their poverty, hence their inability to think of any novel idea that would enhance their sustenance other than begging in the streets. With poverty as a sub-culture, people found it difficult to manage risk, they have failed to see „risk as a way of breaking the vicious circle of poverty". Failure to take risk has entrenched and sustained their status of people with low level of education, low self-esteem, poor health, lack of skills, absence of support mechanism, remoteness from market, lack of physical asset or borrowing power, malnourishment, hence the difficulty to triumph over poverty. As a result, the poor are trapped in their situation with little chance of escaping it. This vicious circle of poverty is maintained across genera-tions. Therefore, in order for the poor to meet their basic needs, they have to resort into begging.

Conclusions

It is apparent that begging has become a social deviance in Nigeria because it contradicts the norms and values of the society. Beggars continue to plague the commercial centres, major roads and streets in the course of pursuance of their chosen means of livelihood. Similarly, begging across the streets of Nigeria tends to be worrisome, thus demanding continuous attention despite the earlier efforts of the government and the media to tackle the problem. All efforts to solve this problem have proved futile as beggars are on the rise in population and can be seen in public places, com-mercial centres, and neighborhoods – even worse – on commercial vehicles. The study found that a large number of street beggars feel indifferent towards begging, hence their continued involve-ment in begging activities as their major means of livelihood. Begging thus flourishes because people tend to be generous. A fact that cannot be denied is that begging will continue to thrive if nothing is done to curb this menace. Curbing the menace, however, depends on how cities and public places are organized. A less organized commercial or public place, where informal activi-ties are predominant, tends to attract more beggars who demonstrate their poverty and relative deprivation in whatever way they can as major causes of act of begging. Continuous absence of any means of livelihood will encourage many people to resort to the begging life. In line with the existing format, some may enter into the act temporarily while others may engage in it perma-nently. Nevertheless, it is observable that begging activities have attracted substantial proportions of people in urban centres. The act possesses the psychological effect of stripping persons of their self-respect and dignity. In this regard, it appears that the factors that lead someone to engage in begging tend to be the very factors that actually reinforce such a practice. From observations and interviews it is apparent that the participants continue to beg because the factors that facilitate this practice (i.e. unemployment, poor educational level, disrupted family backgrounds) remain unalleviated, therefore continuously supporting the practice of begging. Necessary measures like awareness programmes, among others, need to be conducted for the poor in order to help them realize how shameful it is to beg.

Recommendations

The following accommodations were generated from the study as steps towards curbing the menace which street begging constitutes:

1. Poverty alleviation programmes should be established that would have direct bearing on beggars and different categories of the needy. Sustainable and effective rehabilitation schemes should be implemented that aiming at reducing begging among the poverty ridden able-bodied people, especially women, who are not catered for.

2. Other religious groups (Christians and other religious bodies) can also function by constituting themselves as NGOs and establish committees to donate a certain percentage of their revenues to charity services, especially to those who genuinely deserve such service or help. They could have their own rehabilitation schemes/centres separately or jointly with similar religious bodies.

3. Islamic groups, especially in the North, should advise strongly their people who have their children and wards in different Qur'anic schools and those willing to do so, that they should see the upbringing and education of their children as their social responsibility. As a matter of fact, they should see the help coming to any Qur'anic schools or similar organizations as a privilege.

4. Street begging deserve a collaboration of the government, Nigerian populace, counselors, philanthropists, and NGOs in order to fight poverty and provide mass and free education devoid of any form of discomfort.

5. The workshops can be planned for beggars in all states intimating them on the need to be off the streets, inviting resource persons to teach various trades and liaising with the federal, state, and local governments to provide funds for a takeoff projects such as shoemaking, weaving, soap making etc.

6. There should be a special department for the destitute in the Ministry of Social Welfare, funded by Government in order to organize and manage rehabilitation centres in all the states. The rehabilitation centres should serve three main functions such as physical restoration, educational rehabilitation, and psychosocial rehabilitation.

Acknowledgment

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Citation

The International Community's Response to the Ghouta Chemical Attack of 2013

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Keywords:	Ghouta chemical attack, nonproliferation, Syrian uprising, Arab Spring, Middle East

Abstract	This paper brings to the fore several sociopolitical and legal dimensions related to the international response to the Ghouta chemical attack of August 2013 that completely redefined the way we approach the Syrian conflict in general. This deadly chemical assault should be seen as one of the most important events that defined the way the international community has dealt with the Syrian Arab Spring, for, according to several influential accounts, the magnitude of this attack clearly transcended the inviolability of the nation-state. Yet, despite gathering compelling *prima facie* evidence that this attack was linked to Bashar al-Assad's loyalists, the expected full-blown military retaliation against his regime did not occur. The Syrian regime did not face any severe consequences for its actions except for being exposed to the discomfort of temporary international sanctions that obliged the regime to relinquish its chemical weapons arsenal under international supervision. We know today that despite the promised full cooperation from Syrian officials, the mandate to relinquish all illegal weapons of mass destruction was fulfilled only to a limited extent.

Introduction

As of today, the Syrian conflict is slowly but surely heading to its inevitable conclusion. Still, no matter what the future holds for this country, Syria has suffered an unimaginable scale of destruction and displacement that was caused by multiple actors during the last eleven years. In the end, there are no winners, only losers, of this conflict. Assad, having defeated his political enemies, did not win the war but survived it. Yet he is emerging from this confrontation as possibly the biggest loser, for his political credibility is virtually non-existent due to his regime's war crimes and various human rights abuses. This is particularly true due to his regime's involvement in the Ghouta chemical attack that happened on 21 August 2013 and accounts for one of the deadliest chemical weapons assaults in recent history and one of the most blatant examples of intentional human rights abuses orchestrated in recent decades (Burke, 2017).

The main goal of this paper is to scrutinize the nature of the policy-making mistakes committed during the negotiating process between American, Russian, and Syrian officials to equip

future decision-makers with better policy-making suggestions to deal with similar challenges in the future in a more effective manner. I intend to focus here on the international community's response to the Ghouta chemical attack of 2013. This attack and the international response to it, or lack thereof, can be seen as one of the most negative outcomes of this conflict from the international community's perspective. Moreover, this inaction has contributed significantly to the growing disillusionment as to the role of the international community and the United Nations in both Syria and the broader region.

Subsequently, I argue that an inadvertent consequence of the lack of an adequate response to the perpetrators of this chemical weapons attack ultimately killed the spirit of the Arab Spring in Syria, for it softened the moderate rebels' resolve, strengthened Assad's position in relation to his political opponents, and encouraged the jihadist forces to consolidate their gains in Syria. The lack of a more robust international response also produced more disillusionment among both the opposition fighters and potential recruits, for it gave them the impression that joining the Islamic State in Syria and Iraq or the al-Nusra Front (groups still not accused of genocidal actions in mid-2013, whose "full" radicalization, according to Human Rights Watch (2017), happened at the end of the year) would yield more results, for it was apparent that the Free Syrian Army (FSA)'s actions no longer enjoyed Western powers sufficient support. One can also argue that an unintended consequence of this far-reaching restraint of Western powers in Syria also resulted in the further deterioration into full-blown civil war in both countries (Syria and Iraq) in the following years. It may have also inspired Putin to intervene in September 2015 on behalf of Syria's dictator – in this instance, a fullyearned pejorative (Washington Post's Editorial Board, 2020). I also maintain that had the international community pursued different goals and objectives in response to the Ghouta attack, some of the abovementioned negative consequences might have been avoided, and the local conflict zone in Syria would not have deteriorated into multiple military confrontations between various small and more sizable groups. However, there was no political will to intervene against the Syrian regime in 2013 due to the fear that the local balance of power was already very shaky. Back then, the moderate fighters had given their all in their fight against Assad, and they had made several noticeable advances. Still, their resolve had been significantly weakened by more than two years of intense fighting during the early stages of the uprising. That is why it was expected that Assad's removal from power at that stage of the uprising would not yield the desired outcome in the long run. There was simply no guarantee that the moderates would be capable of stopping any future jihadist takeover of Syria in the following months or years.

Methodology

This interdisciplinary research hopes to provide the reader with a clear and impartial language of analysis, capable of embracing a more contemplative, evolutionary manner of investigation that is adjustable to the everchanging circumstances of the constantly fluctuating situation in the modern conflict zone. It is supported by a wide array of theoretical foundations, methodologies, fields of inquiry, and paradigms ranging from various disciplines such as the Theory of International

Relations, international law, geopolitics, military studies, conflict resolution strategies, and continental philosophy. It relies heavily on the author's commitment to a systematic collection and analysis of collected data, verifying, and synthesizing all the gathered information through verifiable sources, testdriving the results of this work by relating this debate to the discussions on the scope and scale of the international community's responsibility to bring peace and security back to the Syrian conflict zone after Ghouta attack of 2013, and in relation to the selected other chemical weapon's attacks that happened in this country between 2013 and 2019 (Pietrzak, 2021, pp. 43–76, 101–154).

Why we should assign such significance to this singular chemical attack when there had already been so much blood spilled in Syria

Naturally, the Ghouta attack was not the first time that the Assad regime decided to treat its fellow citizens as cannon fodder, for there are countless examples suggesting that the Syrian president committed various crimes against humanity before 2013, such as persecuting his political opponents and forcing his fellow citizens to endure all sorts of suffering, illtreatment, discrimination, and denials of freedom. So, on this basis, one could ask why this situation was any different from previous assaults inflicted on the civilian population of Syria by the Assad regime. On this occasion, the situation was different, as the magnitude of this attack clearly transcended the inviolability of the nationstate, for it was probably one of the deadliest chemical attacks since the Iran-Iraq War (1980–1988). It resulted in the loss of a significant number of lives (depending on the calculations, between 281 and 1729 casualties (Baker et al., 2013; Chulov et al., 2013; Borger, 2013)), and those people were killed with illegal weapons of mass destruction forbidden by the international community. Even though there was no explicit admission of guilt, many Western political commentators quickly "connected the dots" and made an educated guess suggesting that it was Assad's loyalists who were directly responsible for the use of deadly sarin gas in the attacks (White House, 2013). Despite the clear declarations that such or any similar attack would be seen as crossing a red line, the international community did not respond adequately to this blatant example of human rights violations, as gassing civilians is strongly forbidden by international law (Pietrzak 2019, pp. 33–94; Pietrzak, 2021, pp. 155–178).

Yes, the Syrian regime has never officially claimed any direct or indirect responsibility for the Ghouta attack (Higgins, 2014). Still, the intent here is clear, for it relates to the basic military principle of using all means necessary to halt the enemy's advances towards the capital. We need to remember that the situation in Syria in 2013 was much different than in 2015, for the regime was significantly weaker back then and was trying to close all potential gateways that might lead the FSA to taking the capital. If we apply this military rationale to these deliberations, he who takes the capital city is the ultimate winner of any war. Losing Damascus was something that Assad could not afford in 2013, for his political legitimacy was based on keeping a solid grip on power in Syria and in the capital city. His Machiavellian advisors must have persuaded him to do everything in their power to protect his rule, even if it meant using chemical weapons against fellow

citizens. The fact that the strategically important region of Ghouta ended up in the hands of the FSA in the first place must have been such an unexpected outcome that it must have caused the regime a lot of distress. That the Syrian army was not able to win it back in a conventional manner may also suggest that the perpetrators of the chemical attacks (if they were indeed related to the Assad regime) must have been strongly interested in changing this situation at any cost. As much as Syrian or Russian propaganda argued the contrary, it was difficult to frame the narrative in a way to suggest that the FSA would want to attack their own positions in Ghouta, especially since they had fought such a long time to reach that point. So, considering all those deliberations, we can make an educated guess and put forward a working hypothesis that the Assad's loyalists were behind these attacks, for they were desperate enough to pursue this strategy at any cost, even at the expense of a significant number of civilian lives.

How Assad got away with the Ghouta chemical attack

The magnitude of the Ghouta chemical attack was such that it made headlines and caused significant global outrage among world leaders, including US President Barack Obama, British Prime Minister David Cameron, and French President Francois Hollande, who declared that they would seriously consider retaliatory military action against the Syrian regime. Given the depravity Assad had displayed and the moral outrage at using chemical weapons to kill the innocent, there was a strong case for permitting the expected military intervention. Furthermore, the vast majority of Western decisionmakers were not so keen to intervene in Syria before 21 August 2013. But on this occasion the situation was different, as the events in Ghouta were not just about another conflict in the Middle East – they were about the use of chemical weapons and about making sure that we as an international community would preserve our capability of deterring their use elsewhere in the future. So, as a matter of principle, it was in the international community's interest to respond to these attacks with a full retaliation for an unchecked use of deadly chemical weapons in one place in the world that would ultimately produce similar misuses of illegal chemical weapons elsewhere. According to the Geneva Protocol of 1925[1], the use, possession,

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[1] Even though the Geneva Protocol of 1925 was signed prior to Syrian Arab Republic (re-)gaining independence from France on 17 April 1946 (*de jure* Syria was recognized as a parliamentary republic on 24 October 1945), the country became a party to the Protocol for the Prohibition of the Use in War of Asphyxiating, Poisonous or Other Gases, and of Bacteriological Methods of Warfare of 17 December 1968. Still, Syria did not fully ratify this law until late 2013, and from legal perspective it opens the issue of this country' adherence to this law to various interpretations between 1968 and 2013. This ambiguity was ultimately cleared when Syria's officially acceded to the Chemical Weapons Convention (on 14 September 2013) and became its 190th State Party (on 14 October 2013). But the controversy was still in place in the direct aftermath of the chemical attack in Ghouta in August 2013.When we look at this controversy through the prism of the English School it is good to point out that Linklater and Suganami (2006) distinguish between at least two strong voices in this debate: a pluralist international society that suggests a limited degree of civility between independent political communities, and a solidarist international society that postulates an extended degree of civility in similar situations. Whilst English School pluralist theorists claim that Syria has been bound by this Protocol only inadvertently as a result of various agreements concluded by this country by reason of notification given by its government to the Secretary-General of the United Nations, the English School solidaristswould argue that Syria was inadvertently bound to this legislation in a very direct manner even before 2013, for the Geneva Protocol of 1925 is legally binding to all

and manufacture of chemical weapons is prohibited. Every member of the international community should comply with the relevant treaties preventing their use. Naturally, this piece of legislation is selectively interpreted, for even permanent members of the UNSC have had in their possession large stockpiles of chemical weapons. Still, the main emphasis in this debate is directed towards the concept of their use in military conflict rather than their possession. Still, despite his previous declarations, President Obama made it clear that the US would not respond in a unilateral fashion against the Syrian regime to deter this chemical weapons aggression (Richinick, 2013), and he called on the international community to authorize a collective retaliatory action against Assad at that point. From a legal perspective, the only international body that could authorize such a collective intervention was the United Nations Security Council (UNSC). Still, one of its permanent members, the Russian Federation, was also a great ally of Assad and had vetoed similar initiatives in the past. In th end, because of the potential Russian veto (Davison, Landis, 2018; Deher, 2018), the permanent five members of the UNSC also decided to take more conciliatory measures against the Assad regime. Those measures forced him to give up his chemical weapons arsenal and placed his regime under international supervision until this task was completed. This outcome was achieved predominantly thanks to the diplomatic intervention of Russian Foreign Minister Sergei Lavrov, who outmaneuvered his American counterpart in a last attempt to defend Assad in a meeting with US Secretary of State John Kerry, suggesting that the Syrian president would be ready to surrender his chemical weapons stockpiles in exchange for averting US retaliation. This was an unprecedented turn of events, as instead of punishing Assad for the actions of the loyalist forces under his command in the Ghouta region, the US and Russia decided to make a deal with his regime to offer him what later turned out to be impunity in exchange for relinquishing control of Syrian chemical weapons. This, in essence, meant something else from a criminal law perspective, for it introduced into international law the notion of plea bargaining, which usually involves the defendant's pleading guilty to a lesser charge, while in exchange, the prosecution (in this case the international community) would recommend some leniency in sentencing. However, in essence, this was a very lenient sentence that involved giving up the right to possession of the illegal weapons of mass destruction that should not have been in Assad's arsenal in the first place. One should not be surprised if the opponents of this "plea deal" were not excited about it because despite "having his fingers all over" the chemical weapons attack, the Syrian regime was suddenly, out of the blue, offered a generous "Get Out of Jail Free" card, without even admitting any wrongdoing. Furthermore, the message that Assad received in the aftermath of the 2013

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countries of the world without any exception. This has to do with the qualified progressive interpretation of the peaceful coexistence among nations principle that places mutually recognized limits on the use of force both in the international and domestic realm, simply because unequivocal restraint in respect of the use of chemical weapons is expected of all states in an international system of states, without any exception. The very fact that the Syrian government did not ratify this protocol until 2013 suggests that it was aware of the international community's legal standing in this respect. For more information in this respect, see Trapp (2014, pp. 7–23), Trapp (2017, pp. 363–378), Bain (2010), and *Convention on the Prohibition of the Development, Production, Stockpiling, and Use of Chemical Weapons and on their Destruction.* United Nations Treaty Collection, Chapter XXVI: Disarmament.

Ghouta attack was that the international community let him get away with the crime in exchange for his chemical weapons arsenal and that he could still "enjoy" the "luxury of pounding his foes city by city", leaving them little space to retreat or regroup, for he would not be held accountable for the unjust imprisonment or torture of his political opponents that happened prior to 2013, if he only promised not to use chemical weapons again, at least not so often.

Naturally, the opponents of the post-Ghouta attack negotiation with Assad emphasized that this deal did not go far enough since it created conditions of impunity for any perpetrator of similar future attacks. It was also stressed that by agreeing to such a solution, global decisionmakers agreed to a silent conspiracy to pretend that nothing significant happened at Ghouta if the Assad regime plays by the rules and shows a readiness to relinquish its chemical weapons. Subsequently, it was also maintained that letting Assad get away with this crime seemed like a fundamentally wrong decision from an ethical standpoint as it allowed the responsible party to go unpunished for the crimes committed against the Syrian people. But clearly, Moscow and Washington were driven by different intentions during the post-Ghouta attack negotiations with the Syrian regime. The Russians wanted to protect the friendly despot from the Middle East at all costs, whilst the US government was interested in securing the destruction of the rest of the chemical weapons in Assad's arsenal or at least placing them under international supervision so no Syrian would be exposed in future to chemical attack.

The paradox of the situation back then was that the parties considering retaliation against the Syrian authorities in response to the use of chemical weapons would most probably have utilized NATO's experience in former Yugoslavia, for that is practically the best-known point of reference in such situations. But this would have meant that such an operation would have had a very militaristic character that would not have prioritized saving Syrian lives but rather would have entailed a limited bombing campaign against military targets, governmental buildings, or Assad's private residence and bunker. However, from the perspective of the Obama administration, dropping a limited number of bombs on Syrian positions was not a viable option. Neither the US government nor the international community had the intention to deploy 100,000 pairs of boots on the ground to remove Assad from power and to bring the real perpetrators of the attack to justice. Implementing such an idea would have meant opening Pandora's box, as George W. Bush did in Iraq in 2003. Such an action could not have produced any meaningful outcome that would have satisfied the expectations of those who advocated securing more tangible support for the moderates. Also, any irresponsible use of the US's retaliatory arsenal might have created more harm than good. For these reasons, there was no point in pretending that Washington had obtained some miraculous cure that would have solved all the problems of the Syrian people and removed their leader from power. Instead, what Obama and his Russian counterpart achieved, was to put some of the most dangerous weapons of mass destruction in the world under international supervision. This also meant securing the destruction of chemical agents that were destined to be misused, as, by mid 2013, the Syrian conflict zone had seen a vast influx of jihadist fighters who had already openly started taking advantage of local chaos to lay the foundations for a mini jihadist state.

The US response to the Khan Shaykhun chemical attacks of 2017

From the perspective of hindsight, we know that Assad's promises and explanations were largely disingenuous. Soon afterward, Syria became the site of a number of regime chemical attacks, at least up until early 2019.[2] Morgan Ortagus from the US State Department claims that "the Assad regime has used chemical weapons on its own people at least 50 times since the conflict began" (Ortagus, 2020). Still, if we were to compare the magnitude and the scope of the Ghouta chemical attack to any other chemical attacks after 2013, it would be to those that occurred in the town of Khan Shaykhun in the Idlib Province in 2017 (that killed at least 86 people, for regime hands were all over that attack again). A day later, the newlyelected US President Donald Trump criticized the Syrian regime for the attack and decided to authorize a swift retaliatory action against the Syrian regime with 59 Tomahawk cruise missiles that were fired against the Shayrat Airfield, where the warplanes used in these chemical attacks were located. Trump presented this action as a decisive action against a political player who was already persistent in overusing the chemical agents he found at his disposal at the expense of his fellow citizens to save his position. However, we need to say that this response was proportional but still inadequate, for this action achieved nothing of substance for the region's security. To anyone who compares this act of retaliation with previous US interventions in the region in the last twenty years, it must seem a somewhat conservative improvisation compared to what the US Army was really capable of. Also, this response had nothing to do with the concept of humanitarian intervention because of its retaliatory character: it did not intend to save civilian lives. It just showed that Trump was not interested in doing anything beyond striking an unknown military object of minimal strategic importance.

Clearly, the Obama administration had achieved more in 2013 by restraining from using military force than Trump in 2017 by responding unilaterally with "a couple of cruise missiles attacks", for, in essence, Trump prioritized this action's retaliatory character over the humanitarian needs of saving the lives of people who might have otherwise been subjected to chemical weapons in the following years. Naturally, the very fact that this attack has occurred suggests that despite the promised full cooperation from Syrian officials in 2013, the mandate to relinquish all illegal weapons of mass destruction was not entirely fulfilled, for very similar chemical attacks kept happening in Syria until at least the beginning of 2019. But, when we consider the full scale and scope of all of the prevented chemical attacks that might have otherwise happened with the use of a hundred tons of deadly chemical agents, it has to be admitted that there was merit to offering Assad a "plea deal" in 2013, for this decision has saved hundreds of lives. Thanks to that, much

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[2] See the reported chemical weapons attacks in: Al-Hasakah on 28 June 2015, Mare' on 1 September 2015, Sheikh Maqsood on 7 April 2016, Eastern Ghouta on 15 June 2016, Aleppo on 10 August 2016, Dandaniya on 25 August 2016, Kafr Zita on 1 October 2016, Sheikh Maqsood on 8 October 2016, Sheikh Maqsood on 25 November 2016, Wadi Barada on 8 January 2017, Al-Lataminah between 25 and 30 March 2017, Hbit on 3 April 2017, Khan Shaykhun on 4 April 2017, Douma on 11 January 2018, East Ghouta on 22 January 2018, Douma on 1 February 2018, Saraqeb on 4 February 2018, Aranda, Afrin on 16 February 2018, Douma on 26 February 2018, Douma on 7 April 2018, Aleppo on 24 November 2018, and Kabana on 19 May 2019. For more information in this respect, refer to similar reports prepared by Organization for the Prohibition of Chemical Weapons (OPCW), United Nations Human Rights Council (UNHRC), Human Rights Watch (HRW).

larger humanitarian disasters in the making were averted as tons of chemical weapons did not end up in the hands of, for instance, Abu Bakr al-Baghdadi or any other radical from ISIS or al-Nusra (Prendergast 2019, pp. 336; Ruthven, 2014).

Discussion

The Syrian conflict has caused catastrophic casualties, one of the worst humanitarian disasters in the 21st century. The ultimate responsibility for the cataclysm of this senseless war lies on the shoulders of many, not only the regime, the opposition forces, and the jihadists. Still, it is also shared with their foreign handlers who support them from afar, either by sending arms and ammunition or providing diplomatic coverage for specific actions on the ground. When it comes to the Ghouta chemical attack of August 2013, the Syrian regime's fingers are all over this deadly assault. Still, Bashar al-Assad did not face any severe consequences for his actions except for being exposed to the discomfort of temporary international sanctions that obliged his regime to relinquish its chemical weapons arsenal under international supervision.

The international community decided not to pursue any collective retaliatory actions against the culprits of this transnational crime. The logic behind this action can be partly explained by the need to remove these deadly weapons from the Syrian theater of war so they would not end up in the wrong hands of a less predictable government. The application of this logic was heavily criticized, especially given that it was reported that the regime had used chemical weapons on several occasions after 2013 (Human Rights Watch, 2013, 2015). This is, however, the only tip of the iceberg, for ultimately, the members of the international community have proven to be very reluctant to chase Bashar al-Assad to "the gates of hell" to bring him to justice because he happened to have a powerful Russian friend. If it had not been for Putin, the Syrian leader would have attempted to flee his country in the manner of Ukrainian President Victor Yanukovych, who fled Ukraine in 2014, as he would have been afraid of facing the same fate as Muammar Gadhafi or Saddam Hussein. However, Assad did not have to "worry too much" about his safety, for Russia had blocked every UNSC suggestion of the necessity of implementing the socalled collective selfdefense action of the former Yugoslavia type. Effectively, instead of punishing one of the most significant human rights abuses in the region, Assad's rule was artificially extended, which happened at the expense of the Syrian society. The Assad example illustrates that even if you are a human rights violator, when you have such influential friends as Russia and President Putin, you needn't fear for your safety. They seem to be inclined to protect your interest no matter what. You can sleep tight, as nothing wrong will happen to you.

This, naturally, opens up the question of protecting fundamental human rights and analyzing the situations in which they are so openly violated. Unfortunately, despite this system's complexity and our legislation's strength, we still suffer from a lack of the ability to use clearly defined retaliatory measures against those who violate international law. This means that there is still an explicit limitation of our UN-based global security system, for it is clear that international legislators have put too much emphasis on developing a very comprehensive set of laws and regulations

preventing countries from waging wars against each other and protecting the state sovereignty of any given country, but too little has been done to create conditions to protect the human rights of endangered populations in civil war scenarios. Indeed, the way in which the international community responded to the Ghouta crisis and the Syrian conflict, in general, can be partly explained by the way the international legal system works, for it is still heavily influenced by Max Weber's doctrine that the state owns a monopoly on violence, which is supported by the principle of nonintervention in the internal affairs of independent international actors. This legal, institutional basis is underpinned by the UNSC's position as the ultimate arbiter that is legally allowed to decide when the nonintervention doctrine should be bypassed and under what circumstances it should be respected. In this sense, UNSC is solely responsible for sanctioning coercion in the global environment and has a comprehensive mandate to decide what measures should be taken to restore the rule of law in the conflict zones of the contemporary world. So, naturally, we need to indicate the existence of the Responsibility to Protect (R2P) Doctrine[3] (one of the most recent additions to how humanitarian response law functions), for it reinterprets the traditional noninterventionist standpoint of the international community to a large extent. But the use of R2P is still rather selective because such influential states as Russia and China show a farreaching skepticism to the R2P's arbitrary use in the international realm.

Even if the UNSC fails to find a way to deal with a particular global issue at hand (especially if it happens to be as dynamic, complex, and elusive as the Syrian conflict), this organization should still be seen as the only body capable of authorizing an intervention aimed at protecting human rights in any given country, at least for the time being, for even though the story of the Syrian conflict and the international community's response to the use of prohibited chemical weapons has no happy ending, the UN-based collective security system is not a dysfunctional relic of the past, for there is a way to change it either through evolution or revolution. We surely can learn a precious lesson from our policymaking mistakes in Syria.

Disclaimer

This paper was written prior to the outbreak of Russia's War in Ukraine in 2022. Therefore, it does not compare the situation in both war zones. However, it still can be used as a helpful point of reference in a broader debate on the scope and scale of the international community's responsibility for bringing peace and security back to the contemporary conflict zone affected by hypothetical chemical weapons attacks. Given that Putin's war in Ukraine does not look like a victorious campaign by any standard, and considering that the international community had shown a farreaching restraint when it comes to bringing the regimes that directly benefited from the use of chemical

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[3] The Responsibility to Protect (R2P) Doctrine is the latest, modest but surely advantageous, legal innovation in this respect that was introduced by international legislators to prioritize human rights protection over the laws protecting the territorial integrity and sovereignty of any given state, especially in instances in which any given rogue regime attempts to hide under the shield of sovereignty (Genser, Cotler, 2011; Thakur, Maley, 2015, pp. 3–78).

weapons to justice, we can make an educated guess that President of Russian Federation and the commanders under his command may have the incentive to resort to the weapons of mass destruction to pursue particular military objectives if their army continues to underperform.[4]

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[4] For more information in this respect, please see: Pietrzak, P. 2022. "A Comparative Study of Russia's War in Ukraine (2014-, including its 2022 escalation), Russia's aggression in Georgia (2008), and Russia's Military Operations in Syria (2015-)" *the 7th International Symposium of the Middle East "Political and Social Stability in the Middle East*: Edited by Gündoğdu, Emre, Turan, Yunus Bildiriler | and | Pietrzak, P. (2022). The Putinization of the situation of women and children during the 2022 Russian invasion of Ukraine. *In Statu Nascendi Journal of Political Philosophy and International Relations: Special Issue: Gender Equality in Politics and International*, 5 (2), 19–76.

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Citation

Ukraine's Balance Policy between European Union and Russia

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Abstract   Having declared independence in 1991, after the dissolution of the Soviet Union, Ukraine gained strategic importance in terms of its geographical location. It is regarded a "buffer zone" for both the European Union (EU) and Russia. There is a division within the country into the pro-Western and pro-Russian options. Ukraine's aspiration for the UE membership has faced Russia's objection since time immemorial. In the past, Ukraine preferred to pursue a balance policy between Russia and the EU. Ukraine's attempt to approach the West with the Orange Revolution, its inclusion in the European Neighbourhood Policy, its participation in the Eastern Partnership program were perceived as a threat by Russia. The Ukrainian crisis, in particular, brought these two countries face to face. This crisis also deeply affected both the EU's energy policy and its relations with Russia. After all the developments that followed, the issue of Ukraine's membership in the EU remains uncertain.

Introduction

Ukraine is a very important country from a geostrategic point of view. Being a "buffer zone" between Russia and the EU makes the country valuable both for the EU and Russia. Ukraine had remained under the rule of the Soviet Union until it gained independence in 1991. Although Ukraine wished to establish close relations with the European Union (EU) after becoming an independent state, the Russian factor prevented this, as for Russia, Ukraine is of particular importance, both strategically and because of the Russian population that inhabits it. Russia, one of the biggest trade partners of the EU, carries the energy supplies to the UE countries via Ukraine. While Ukraine's

foreign policy is sometimes close to that of Russia, sometimes it follows the EU preferences. Stuck between these two options, Ukraine is nearly doomed to a balance policy.

While one side of Ukraine aims to integrate with the West and develop relations with the EU, the other side wants to maintain relations with Russia. Based on this, there is a division within the country. It is possible to see this division especially during the election periods and in the foreign policy decision-making processes. With the Orange Revolution, Ukraine took steps to become a member of such international organizations as the EU and NATO. The Orange Revolution and the Ukraine crisis proved to be important for the general course of the EU–Ukraine relations. Especially with the Ukraine crisis, the EU and Russia have come face to face one on one. This crisis has affected both the EU's energy policy and its relations with Russia. Moreover, important are the Association Agreement signed between Ukraine and the EU and the Eastern Partnership realised within the scope of the European Neighbourhood Policy.

Russia and Ukraine are two different nations with mutual historical and cultural ties. Ukraine, which gained independence after 1991, has since followed an unstable domestic and foreign policy in the process of becoming a nation-state. While Ukraine wants to achieve full independence, Russia sees Ukraine as a dependent post-Soviet Union territory. Ukraine sometimes has followed a pro-Western policy and sometimes a foreign policy in the orbit of Russia, thereby making effort to maintain its independence between these two balances. This balance policy caused it numerous problems with Russia. Future will show the effects of this balance policy. It should be emphasized that Russia is ready to realize its own wishes with military operations, if it deems them necessary.

This study is based on the literature review. It discusses in general terms the change and transformation of Ukraine's relations with the EU and Russia, from the past to the present. First examined are the geostrategic importance of Ukraine, the division of Ukraine, the Orange Revolution, the Ukraine crisis, the post-independence developments in the country, such as Russia's annexation of Crimea. Afterwards, the EU specific relations are analysed, including the Ukraine's EU Policy, the European Neighbourhood Policy and, finally, the EU–Ukraine Association Agreement. The scope of the discussion has been confined to the specific events in the triangle of Ukraine, Russia, and the EU. The main problem raised here is the balance policy followed by Ukraine, with particular emphasis on the developments which took place in 2014 and later, making Ukraine to follow pro-Western policies.

Ukraine's geostrategic importance

After the collapse of the Soviet Union, Ukraine declared independence in 1991 and started to exist as a new actor in the international system. In addition to being one of the largest countries in Europe, with an area of 603,000 square kilometres, it is the second most important country in Eastern Europe after Russia. Due to its geographical location, it has a key importance for both Russia and Europe. Russia has always seen Ukraine as a buffer zone or an important transit area. From this point of view, it should be noted that the word 'Ukraina' in the Russian language conveys the meaning of a "border country, end country" (Bilener, 2004, p. 311). From the perspective of

the EU, the situation is not much different. The EU also sees Ukraine as a buffer zone. To summarize, the EU considers Ukraine a grey area protecting it against a possible danger from the east, while Russia regards it as a buffer zone against possible attacks from the west. It is also obvious that Ukraine, which is stuck between two powers, has no alternative but to pursue a policy of balance (Keskin, 2017, p. 105).

Ukraine has always maintained its importance, from the distant past to the present. It was its large territory and its economic potential that played a role. As it is known, during the Cold War period, while the Soviet Union was more active in the Black Sea and its coasts, the USA could not be as effective as the Soviets in that region. In the process that started after the collapse of the Soviet Union, especially the countries around the Black Sea regained their value once again. A critical period has begun for Ukraine, which Russia describes as a strategic barrier. It concerns particularly the energy transmission lines (Dural, Emiraliyev, 2015, p. 105). As far as the natural resources are concerned, it is known that approximately 5% of the mineral resources existing in the world are located in Ukraine. Especially, the reserves of the coal, oil and natural gas, iron ore, and the mineral rock deposits in the Donbas basin are very important for the country (Ukrainetreak.com, 2022).

With the independence of Ukraine as one of the best industrially developed countries of the former Soviet Union, the Donbas mines have become very important not only for Ukraine itself, but also for all the countries around it. However, it should be known that the scarcity of energy resources is one of the main problems of this country (Bilener, 2004, p. 311). Ukraine acts as an energy corridor in the eyes of Russia. Ukraine is indispensable for Russia, which has invested in the energy sector and developed its economy in this way. However, it should not be forgotten that Ukraine could not save itself from being dependent on Russia in terms of oil and natural gas. For this reason, it was inevitable to establish a relationship of interdependence between the two countries. Ukraine's dependence on Russia in terms of oil and natural gas will bring some problems for Ukraine in the future (Sonmez et al., 2015, p. 657).

While Ukraine was shaping its foreign policy with its break from the Soviet Union, it did not completely ignore its cultural, economic, political, and historical relations with the Soviet Union, while at the same time trying to establish closer ties with the western community. In this context, the EU and NATO have been important institutions for Ukraine. The balance policy that Ukraine has established between the EU and Russia has sometimes been negatively reflected in its domestic and foreign policy. It is possible to say that a transformative policy has been followed in the country on the axis of Eurasianism and Westernism (Akdemir, 2014, pp. 61–62).

Ethnic and ideological structure of Ukraine

Ukraine has a population of approximately 43 million according to 2022 data (DW, 2022). Approximately 77% of this total population is of Ukrainian origin, while 17% is of Russian origin. The remainder consists of very few Tatars, Jews, Moldovans, Belarusians, Romanians, Poles, Bulgarians, and Hungarians. There is a division within the country, mostly between Russians and

Ukrainians. As to the religious structure of this population, the Orthodoxy is dominant, but there is a social structure consisting of the Catholics (Stork, 2015, pp. 28–29).

Considering this information, it is possible to roughly distinguish two parts of Ukraine – the east and west ones. Eastern and Western Ukraine is separated by the Dnieper river. Although it is not meant to constitute a sharp border, such a distinction is made due to the country's *de facto* divided ethnic structure. While Eastern Ukraine is a predominantly Orthodox and Russian area, Western Ukraine is a predominantly ethnic Ukrainian region where the Catholics live. Another difference is that mineral resources are predominantly found in the east and its economy consists mainly of heavy industry, while the west is a complete agricultural region (Bilener, 2007, p. 116). In addition to this separation into the east and west, the Crimean peninsula constitutes a special region. More than half of the Crimea region is populated by the Russians. The Crimea region was taken from Russia in 1954 as a gift on the 300th anniversary of the Pereyaslav Treaty and also as a sign of goodwill, and became an autonomous region belonging to Ukraine (Tecer, 2014, p. 110). The country as a whole is almost entirely Slavic. When the historical evolution of the Russia and Ukraine is analyzed, it can be seen that the citizens of these two countries are two communities close to each other both in terms of culture and the language they use. Moreover, there are those who define Ukrainians as "little Russians" (Bingol, 2014, p. 18).

People of Russian origin living in the eastern part of the country introduce themselves as Eurasians. Even in the elections held in the country, the easterners vote for parties that make pro-Russian policies. However, they openly oppose he Ukraine's westward shift, that is, its membership in such organizations as the EU or NATO. On the contrary, the Western part considers themselves an indispensable part of the Eastern European tradition. In accordance with this, the inhabitants of this region fully support westernization and support parties advocating integration with the West. At the same time, they consider themselves Europeans (Bişkin, 2010, p. 45).

The main reason underlying the existence of such a polarization within the country is that one side lived under the Russian and the other under Austrian rule for a long time throughout history. The problem of reconciliation between these two separate groups constitutes one of the most complex problems that Ukraine has experienced in the postindependence nationstate forming process. As a matter of fact, the two regions supporting different political parties has been a determining factor in the shaping of political life (Bilener, 2004, pp. 333–334). In this context, the internal dynamics of the country has been an important element of power in determining the state's structural organizations and foreign policy preferences. It is an undeniable fact that the basic values of the societies living in the country have an impact on the shaping of the discourse and practices in the country's foreign policy. In this direction, western Ukraine, which identifies its core values with the West and Europe, on the one hand, and eastern Ukraine, which shares its history with Russia and Eurasia, on the othand, laid the groundwork for political polarization in the intellectual field, specific to domestic politics (Tecer-Çağri, 2014, pp. 110–111).

Russia and the EU have different views of the recognition of Ukraine's independence. First of all, since the independence of Ukraine was not immediately accepted by Russia, bilateral relations between these two countries did not become official at once. Russia accepted Ukraine as a sister

country and evaluated it as an autonomous region under Russia. The EU, on the other hand, assumed Ukraine as an independent state and pursued a policy in that direction (Keskin, 2017, p. 110).

Ukraine, which became independent in 1991, attempted to solve the problems that emerged in relations with Russia, while at the same time tried to pursue independent policy towards the West. Ukraine adopted three main lines of foreign policy: First, the Eurasian paradigm advocating the adoption of a policy around Russia and the Commonwealth of Independent States (CIS), second, the Euro-Atlantic paradigm aiming at Europe and the Atlantic region, and third, a policy in line with the Ukraine's basic interests. The latter is the Southeast paradigm that advocates regional cooperation with various interested countries (Turan, 2004, p. 380).

When a general analysis is made, it is possible to summarize main priorities of the Ukraine's foreign policy. It is aimed at taking various steps to strengthen the fully independent position of the country and to integrate its national identity by founding the political institutions on a democratic basis. In addition, the main priorities include: harmonizing the country with Euro-Atlantic institutions, making efforts to ensure the interests of the country in the global arena, creating a comprehensive cooperation environment with Russia, and strengthening ties with the neighbouring countries (Buyukakinci, 2004, pp. 408–409).

Turning point for independent Ukraine: The Orange Revolution

After gaining independence in 1991, Ukraine's first president was the pro-Western Leonid Kravchuk. In this period Kravchuk, like many other post-Soviet state leaders, focused on liberal reforms in politics and economy. However, due to the economic and political chaos that resulted from these reforms, Leonid Kuchma, who was thought to be pro-Russian in the first place, was appointed as the new head of state in 1994 to replace Kravchuk. Despite being known as pro-Russian, Kuchma did not hesitate to implement a multi-vector policy when necessary and occasionally pursued anti-Russian policies. In the first period, therefore, a balance policy was applied towards both the West and Russia (Tezer, 2014, p. 111). During the Kuchma period, Ukraine received the third largest amount of foreign aid from the USA. In addition, Ukraine signed the Partnership for Peace Treaty with NATO and developed the relations with United Kingdom. The vision of joining the EU was for the first time put forward during the Kuchma period (Kuzio, 2006, p. 91).

The discourse and practices of Kuchma in the following periods were described as soft authoritarianism from the Soviet Union period. In this context, opposition movements have emerged in the country, corruption reduced the influence of civil society, and interventions in the media were undertaken. Finally, after the emergence of the cassette tapes containing Kuchma's statements about the murder of an opposition journalist, a political crisis arose and the Kuchma era came to an end (Sarikaya, 2010, p. 3).

The 2004 presidential elections of independent Ukraine were of critical importance for the future of Ukraine. Although the course of relations between Ukraine and Russia improved before the Orange Revolution, some difficulties were experienced during this election period. The first of the two important candidates in the election was the pro-Russian Victor Yanukovych,

while the second was the pro-Western Viktor Yushchenko. The Moscow government clearly supported Yanukovych, and the governments of Western Europe supported Yushchenko. The problems experienced during the election period have been an indicator of the conflict caused by the division within the country (Keskin, 2017, pp. 98–99).

Under normal circumstances, after the second round elections, it was announced that the Russian supporter Yanukovych won the election. However, this situation was not accepted by the public. When it was announced that irregularities were discovered in the elections, the people revolted. The people, who could not accept the situation, used the color orange as a kind of symbol for themselves and their future. The analyzes revealed that the elections were devoid of justice and fairness, were not democratic and were not conducted according to current international standards. With the election results being deemed invalid, a vote was held again. The pro-Western Yushchenko won there-election (Sarikaya, 2014, pp. 55–57).

It would be very appropriate to say that the Orange Revolution is a clear artifact of the division existing in the country. The people living in the east of the country, predominantly Russians, did not support the revolution and did not show up, while those living in the west of the country were very active here. What should be emphasized is that the people's revolt and pouring into the town squares was not a bloody struggle, it was carried out with dances and music. In addition, it should be underlined that the USA had an influence on these election results. The supporters of Yushchenko were also presented with a financial aid package by the USA. Although this incident reminded the rivalry of Russia and the USA during the cold war, the West became the winner in 2004 (Erbil, 2010, pp. 151–154).

Yushchenko was considered by both the EU and the USA as a manager capable of establishing a liberal democracy system. Because of this, he succeeded in getting the support of the West. He thought that the Ukrainian language should be spoken all over the country and announced this language compulsory. Thus, Ukraine aimed at breaking away from the Russians, adopting its own national identity, and carried out policy in this direction. Yushchenko was the country's third elected head of state, serving a total of five years. After being elected president, he elected Yulia Tymoshenko as prime minister. However, as a result of the unpleasant events between the two in the future, Yuriy Yekhanurov succeeded in sitting in the prime minister's seat a year later (Benli, 2016, pp. 86–88).

When Yushchenko came to power, he clearly stated that Ukraine should break away from its multi-dimensional perception of politics. Yushchenko stated that the priority for Ukraine's security and future is integration into the union, and that the foreign policy orientation in the next period is to become a member of the EU and NATO (Bajor, 2017, pp. 13–14). The Orange Revolution has been called the victory of the people's power throughout the country. The new government that came to power declared war against corruption in the country. Some work has been done to combat corruption. When the foreign policy administration of the country in the previous periods was analyzed, many inconsistent and contradictory statements and activities in this direction were revealed. Therefore, the first thing to do was to draw closer to the EU by forming a policy in a definite and determined line (Kurth, 2005, pp. 150–151).

The events that took place under the name of the Orange Revolution were written as a minus in Russia's record. Yushchenko and Tymoshenko, whom he appointed as prime minister, preferred policies aimed at the admission of Ukraine to the EU and its participation in organizations such as NATO. For these purposes, they excluded Russia. However, it is a fact that this situation activated Russia and returned to Ukraine in the form of heavy sanctions (Tuysuzoglu, 2011, p. 67). The election of Yushchenko as the head of state also negatively affected the course of relations between Ukraine and Russia. In the year Yushchenko started his presidency, Russia made a counter move and cut off the natural gas for Ukraine. As a result of the negotiations, the contract, at twice the cost of the gas purchased from Russia, was signed by Ukraine (Kerem, 2022). At this point, it is important not to forget the Ukraine's dependence on Russia when it comes to energy. Russia's use of natural gas as a power factor against Ukraine, whenever it considers it appropriate, makes Ukraine's job more difficult. Likewise, the natural gas cuts cause the trust in the pro-Western administrations to be damaged in the eyes of the public, but it also brings problems in domestic politics (Bişkin, 2010, p. 64).

To make a general assessment, in addition to the problems such as political instability, domestic problems, the economy not developing at the desired level, the reforms not being implemented as expected during Yushchenko's tenure, the interventions of foreign powers in Ukraine in line with their own interests have complicated the country's situation even more. Moreover, the fact that Yushchenko could not achieve the desired success in terms of integration with the West caused disappointment in the eyes of the public (Bişkin, 2010, p. 63).

2014 Ukraine crisis and its effects

With the new election held in Ukraine in 2010, the person who managed to sit in the chair of the president was the pro-Russian Yanukovych (Kerem, 2022). The main tools of the EU's policies to improve its relations with the surrounding countries include the Partnership and Cooperation Agreements. November 2013 was a critical period for the EU–Ukraine relations. That year, the country has almost become confused with the announcement of President Yanukovych that he will postpone the EU–Ukraine Association Agreement. The idea that EU values would be ignored and instead pursued different authoritarian policies worried the public. Thus, various protests began to be held in Kiev. People wanted to further their relations with the West. This event, which is also referred to as the Euromaidan Movement in the literature, was recorded as the first civil resistance mobilized against Ukraine's interest in the EU (Keskin, 2017, pp. 88–89).

Yanukovych stated that he would not sign the Association Agreement with the EU and decided to start the membership negotiations to the Eurasian Economic Union led by Russia. Thereupon, the Russian leader Vladimir Putin and the Ukrainian President Victor Yanukovych came together. Putin offered Ukraine a contract worth 15 billion dollars of economic aid based on the purchase of government bonds and a reduction in natural gas price, in order to solve the country's economic problems. Thus, demonstrations and protests across the country intensified (Alkan, 2015, p. 91). Before 2014, there were already some problems in the relations between Russia and Ukraine,

which included Ukraine's ties with NATO and the EU, the status of Russia's Crimea-based Black Sea Fleet, and the transit of Russian gas to Europe via Ukraine. In addition to these problems, ex-president Yanukovych's follow-up policies in favor of the Moscow government and establishing political and economic ties with it triggered the Honor Revolution (Congressional Research Service, 2021, pp. 14–15).

Citizens gathered in the capital Kiev, most of whom were Western Ukrainians, believed that the basic policy to be carried out for the future of the country should be pursued with participation in such organizations such as NATO and the EU. On the contrary, Eastern Ukrainian citizens were in favor of keeping in closer contact with Russia. As a result, these events came to an end with the dismissal of Yanukovych in 2014 (Saglam, 2014, p. 235). As a result of these developments, although Yanukovych tried to reduce the public's reaction, he was not successful. For this reason, Yanukovych had to resign and later took refuge in Russia. Subsequently, Petro Poroshenko was appointed as the new head of state, replacing Yanukovych (Keskin, 2017, pp. 88–89).

The protests, which started in Kiev, first took place after the rejection of the partnership agreement. Later on, problems such as the violation of various human rights, corruption, government repression, and violation of democracy were added. With the spread of the protests to other cities of the country, the government enacted harsh legal regulations. This situation caused the crisis to flare up from time to time. As a result, many people were injured and about 100 people died (Bingol, 2014, pp. 16–17).

In a sense, it is possible to read the Association Agreement as a move made to prevent the relations with Russia from getting worse than they were. To look at it from another perspective, there are also those who see this move as more beneficial for Ukraine. Namely, it is known that the Association Agreement, which is planned to be made between Ukraine and the EU, will not provide economic gain to the country in a short time. With this agreement, the EU has some expectations that it will be very transparent about capital and adhere to the democratic innovations along with the fight against corruption. But the Ukrainian government and the political elite are not very willing to implement these reforms (Ozdal, 2013, pp. 6–9).

While the Euromaidan event was successfully launched in the regional and global arena, things took a different turn with the annexation of Crimea by Russia in 2014 and the support of some separatist forces that broke out in the east of the country. Many people were injured and many died in the conflict between the protesting groups and the Russian supporter separatists (Keskin, 2017, p. 89). The violent acts that started in the Donbas region, where the Russian population is dense, gradually turned into a serious conflict with the use of heavy weapons. After the annexation of Crimea by Russia, the protests spread to regions such as Donetsk and Luhansk. Some of these regions have passed under the control of the separatists (Ministry of Foreign Affairs of the Republic of Turkey, 2011). In summary, the Ukraine crisis, which emerged after the failure to sign the Association Agreement with the EU, became an international problem with the annexation of Crimea by Russia.

Russia's annexation of Crimea on the axis of Ukraine policy

To briefly analyze Russia's Ukraine policy, the Russians consider the Ukrainian people as a separate tribe of themselves. There are even those who define Ukraine as an artificial state. The Russians do not want a pro-Western administrator to come to power in Ukraine and pursue a pro-Western policy. They firmly oppose Ukraine's wishes to become a member of organizations such as NATO and the EU.

Russia is struggling to have a say over Ukraine, as in the history of the Soviet Union. Russia offers the CIS instead of NATO, and the Eurasian Economic Common Area instead of the EU. Thus, Russia is trying to include Ukraine in these projects (Bişkin, 2010, p. 80). The basic policy of Russia against Ukraine has been shaped in the context of the Near Environment Doctrine. In line with this policy, Russia aimed to be an effective power again in the former Soviet Union geography (Keskin, 2017, p. 111). However, in Russia, the desired level of success was not achieved in the context of the Near Environment Doctrine during the Boris Yeltsin period. It is possible to say that a success was achieved with the coming of Putin to the presidency in 2000. During his tenure, Putin used the energy card and the presence of the Russian minority in the former Soviet Union countries as an important tool in foreign policy. Based on this, the intervention against the Crimea, where the Russian population is in the majority, is considered a success in Russia in this sense (Oztekin, 2019, p. 77).

Ukraine experienced some problems, especially with Russia, after gaining independence. At the beginning of these problems are the status of Crimea and the ownership of the Black Sea Fleet, the control of nuclear weapons in Ukraine remaining there from the Soviet Union times and the transfer of these weapons to Russia. The development of the minority rights of the Russian population living in Ukraine, Russia's approaches towards the recognition of Ukraine's independence, and different perspectives on Ukraine's integration into the CIS are some of the other important problems (Turan, 2004, p. 369).

Crimea has lived under the domination of different civilizations from the past to the present. The last time during the Soviet Union, Nikita Khrushchev left this region to Ukraine as an autonomous region in 1954 (Keskin, 2017, p. 92), on the occasion of the 300th anniversary of the Pereyaslav Treaty as a sign of friendship and brotherhood. Crimea, which was not a problem at that time, later became a very important region in the global arena (Buyukakinci, 2004, p. 405).

Ukraine's separation from the Soviet Union and gaining an independent state identity caused inevitably some problems between the two countries to occur. Crimea, where the Black Sea Fleet is located, is one of the issues that seriously confront Ukraine and Russia. More than a half of the Crimea population are Russians. Therefore, Russia wanted to take back Crimea (Turan, 2004, p. 368). Crimea is also very important from a strategic point of view. The Russian military base is located here. Sevastopol is located right in the center of the Black Sea region. The Crimean Peninsula, which is symbolic for Russia, also has an indispensable value in serving the interests of the country. Sevastopol port provides much more possibilities when compared to other ports. It can accommodate military ships of larger size (Akman, 2014, pp. 10–11).

When discussing the agreements to be made, the idea of partitioning this region, which is normally within the borders of Ukraine, between Ukraine and Russia, was put forward. The country that owns this region will gain in the long run from both the Black Sea and the oil flow to be transferred from the Caspian basin. The problem of the Black Sea Fleet includes the following details: the division of warships between the two countries, the issue of defining the sovereignty of Crimea, the clarification of the basic legal status of the Russian military base located in and around the Crimean port of Sevastopol (Buyukakinci, 2004, pp. 413–414). In 1997, Ukraine and Russia signed an agreement to clarify these issues. With this treaty, the Black Sea Fleet was divided in half between the two countries. Russia leased the ports in Sevastopol for a period of 20 years. Subsequently, it was decided to deduce the rental price from Ukraine's debts to Russia. It was agreed that Crimea is under the auspices of Ukraine (Turan, 2004, pp. 379–380). But in February 2014, Russia annexed Crimea using military force. With this incident, Russia has clearly violated its sovereignty. After the annexation of Crimea by Russia, a referendum was held on the status of Crimea. As a result, Russia achieved its goal and tied Crimea to itself (Sonmez et al., 2015, p. 663).

The regional crisis, which started in the last quarter of 2013, acquired an international dimension with the occupation of Crimea by Russia. The West, especially the EU and the USA, reacted strongly to this move of Russia, announcing that various sanctions would be applied directly against Russia. In fact, the Western countries have stated that they will not recognize the treaty that includes Crimea as a protectorate of Russia. As a result, the West and Russia came face to face in this incident and a great crisis was experienced (Erol, 2014, pp. 2–3).

After the Crimean crisis, the European Council of Heads of State and Government held an extraordinary meeting. At this meeting, Council President Herman Van Rompuy declared that Russia harmed Ukraine's sovereignty as well as its territorial integrity. In addition, he said that the decision taken did not comply with the Ukrainian Constitution. At this meeting, it was stated that the visa exemption negotiations planned to be held between Russia and the EU were cancelled, and the studies for Russia's inclusion in the G-8 Summit will be carried out at a later date (Ozdal et al., 2014, p. 12). The EU could not make quick and effective decisions concerning the Ukraine crisis in the first place. There are many reasons for this. Namely, some foreign policy decisions require the approval of all member states. Therefore, the decision-making mechanism moves slowly in these situations. The approaches of the EU members differed in the Ukraine crisis. For example, while countries such as Lithuania and Poland supported the idea that severe sanctions should be imposed on Russia, countries such as Germany and England pursued a more moderate policy by supporting the idea that sanctions should not be rushed and the problems should be resolved through diplomacy (Bayrakli, 2014, pp. 3–4).

As a result, within the framework of the developments in Crimea and the events in the Donetsk and Luhansk regions, Russia supported the separatist groups and recognized the republics established in these regions. As it is known, Ukraine has tried to maintain a balance policy between the West and Russia for many years. As a result of the latest developments, Ukraine has abandoned this balance policy and decided to pursue a pro-Western policy (Kahraman, 2019, p. 56).

After the events in the east of Ukraine and the annexation of Crimea, some changes were needed in the security policy in Ukraine. In the National Security Strategy document released in 2015, Western norms and institutions were emphasized and Ukraine's desire to develop good relations in cooperation with NATO was revealed. In the continuation of the document, it is mentioned that Russia poses a threat to the territorial integrity of Ukraine. Therefore, the necessity of strengthening the defense of Ukraine was emphasized (Bajor, 2017, p. 14–15).

When we look at the chain of events that took place during and after the Orange Revolution, President Yanukovych's escape from Ukraine, the change of government, the occupation of Crimea and then joining Russia gave a positive impetus to the EU's Ukraine policy in general. As a result of these events, first the political part of the Association Agreement, which was planned to be made in 2014, was signed, and then it was decided that the economic part would be signed in the next period. The EU has once again become a source of hope for Ukraine and a new step towards its integration into the union has been taken (Dural, Emiraliyev, 2015, p. 123).

Ukraine's integration policy towards the European Union

After Ukraine became independent in 1991, it wanted to improve bilateral relations with the EU. First, in 1994, Ukraine declared integration with the European institutions as its first foreign policy strategy. Subsequently, the Association and Cooperation Agreement between the EU and Ukraine was signed in 1998. This treaty deals with social and economic issues. Strategic partnership was mentioned at another summit held that year. While Ukraine wanted to join the EU, the EU stated that they should not act prematurely regarding the membership request, citing the main problems of the country (Bayrakli, 2014, p. 3).

While Ukraine wanted to get closer to the EU after gaining independence, the Russian factor created an obstacle to this. Therefore, it was almost inevitable for the country to adopt a policy of balance. As mentioned before, the geostrategic importance of Ukraine and its role as a buffer between Russia and the EU make this country particularly important. However, from the point of view of the EU, if Ukraine's membership request is answered positively, the buffer zone will disappear and it will join the EU. Thus, the possibility of the EU and Russia to come into conflict will increase, which will pose a major security threat to the union (Sari, 2015, pp. 38–40). In summary, the EU countries have pursued a policy of balance between Russia and Ukraine for a long time. When it comes to energy, EU countries do not want to have Russia against them because of their commitment to Russia. Therefore, it is argued that Ukraine's integration with the European Union rather than its participation in the Union is preferred, because, in order to ensure the security of the EU countries, first of all stability in Ukraine must be ensured. From this point of view, the EU is trying to create a safe buffer zone (Bişkin, 2010, p. 83).

Since its own resources are insufficient to meet its needs, the EU satisfies its energy needs by import. It is a known fact that almost half of the total energy consumed by the EU is imported and this rate will gradually increase in the future. Therefore, the need for oil and natural gas is increasing day by day. This means that the dependence on Russia will increase. In order to reduce it,

one of the energy policies developed by the EU is to improve relations with the former Soviet Union countries. Ukraine is a good example. One of the most important factors that makes Ukraine valuable is the transportation of Russian energy resources to the EU via Ukraine (Yildirim, 2010, p. 58).

Ukraine is recognized as an energy corridor by the EU. The rate of natural gas going to Europe via Ukraine is 80%. This shows that if there is a possible natural gas cut, this will put the EU in serious trouble (Saribay, 2019, pp. 105–106). For example, in 2006, the Russian company Gazprom increased the price of natural gas it transported to Ukraine. As a result of the disagreements between the two countries, Russia cut off the gas flow. The fact that the incident occurred in January had a profound effect in the winter conditions. Ukraine has tried to make up for this shortcoming by confiscating the natural gas that passes through its own country and thus reaches the EU states. The tension, at first between the two countries, later acquired an international dimension. A consensus was reached in the negotiations that followed (Bilener, 2007, pp. 125–126).

The EU has shaped its energy policies towards Ukraine with its strategies towards the former Soviet Union countries. Some of these key policies are: TRACECA (Europe–Caucasus–Asia Transport Corridor), TACIS (Technical Assistance to the Commonwealth of Independent States), INOGATE (Interstate Transport of Oil and Gas to Europe), and ENP, which replaced TACIS in 2007 (European Neighbourhood Policy). Through such programs, the EU has aimed to accelerate Ukraine's transition to a free economy and, in addition, to democracy (Keskin, 2017, p. 107).

Ukraine on the European Union path: European Neighbourhood Policy and Eastern Partnership

In 2004, 10 new members were added to the EU body. With the accession of new countries, the European Commission has presented a document titled "Wider Europe and the Neighbourhood: A New Framework for Our Relationships with Our Neighbours in the East and the South". In this document, the possible problems that the Union will face with the new members have been analyzed and therefore the need for some new effective strategies related to those regions has been emphasized. The economic problems in new places, the deficiencies in the institutional field and the prevention of conflicts were discussed. Ensuring security in neighbouring countries has been one of the main objectives of the Union (Sonmez, 2014, p. 116).

With the enlargements in 2004 and 2007, the EU expanded its borders to the East and to some CIS countries. In 2004, the EU developed the European Neighbourhood Policy (ENP) for the new neighbouring countries joining the union, because the EU is likely to be involved in the problems that neighbouring countries will experience. The main objective of this policy is to increase security, establish friendship relations, and achieve stability and prosperity between the EU, whose number of members increases and expands, with its neighbours. This policy aims at a higher level of trade liberalization as well as gradual incorporation into the single European market (Baltali, 2016, pp. 24–25). Another aim of the European Commission in 2009 within the framework of the European Neighbourhood Policy was to deepen the systematic cooperation between the European Union and its eastern neighbours (Azerbaijan, Armenia, Belarus, Moldova,

Georgia, and Ukraine) and to implement and support fundamental reforms in the political and economic systems of these states. (Malskyy, 2021, p. 60).

The implementation of the ENP is coordinated through the action plans prepared by the EU and the neighbouring countries in its immediate vicinity and within the framework of three principles. These principles are conditionality, differentiation, and joint ownership of the process. Action plans are not legally binding. They are prepared for a short period of several years. They include the innovations to be organized by the neighbouring countries, which are shaped by the principle of differentiation, that is, due to the different characteristics of 16 countries, which exhibit different approaches and include common interests. In summary, action plans are strategic documents prepared for particular countries (Ergan, Seyhun, 2019, p. 165).

While implementing the Neighbourhood Policy, The EU strictly adhered to the principles of democracy, respect for human rights, and the rule of law. The Neighbourhood Policy means "more than partnership less than membership" and covers 16 countries in total (Tassinari, 2011, pp. 40–41). It is possible to list these 16 countries as follows: The southern neighbours are Morocco, Algeria, Jordan, Israel, Lebanon, Syria, Egypt, Tunisia, Palestine, and Libya, the eastern neighbours are Ukraine, Azerbaijan, Georgia, Belarus, Armenia, and finally Moldova. The point to be noted here is that although Cross-Border Cooperation within the scope of the Russian Neighbourhood Policy is involved in activities, it is not a part of the European Neighbourhood Policy (European Commission, 2021). ENP supports regional cooperation initiatives such as Eastern Partnership, Mediterranean Union, and Cross-Border Cooperation (The EU Neighbourhood Portal, 2021). The Eastern Partnership is recognized as part of the ENP. It is possible to evaluate the Eastern Partnership as a special approach that includes the eastern borders developed by Europe after 2009 (Euronews, 2013).

The 6 countries included in the Eastern Partnership are the former Soviet Union states of Armenia, Azerbaijan, Belarus, Ukraine, Moldova, and Georgia. This initiative constitutes a union based on common values. The Eastern Partnership initiative has come to the fore with the aim of economic integration, political cooperation, and strengthened sector cooperation. Here, the EU adopts approaches to increase cooperation opportunities between itself and the state it partnered, and to bring its partners closer than they are in terms of multidimensional exchange and cooperation (Keskin, 2017, p. 57–58). The Eastern Partnership, which includes Ukraine, is a policy carried out to ensure a stronger social structure, governance, and economy (The EU Neighbourhood Portal, 2021). The economic ultimate goal of the Eastern Partnership is to gradually adapt the countries to the Union economy through deep and comprehensive free trade agreements. This partnership offers visa liberalization and the opportunity to travel more easily. It envisages the cooperation in various fields, such as energy, governance, culture, transportation, environment, and economy (Ozerdem, 2012, p. 18).

In 2015, the EU renewed its Neighbourhood Policy. The reason for this is that extremism is becoming more frequent including developments such as terrorism, violations of international law, incitement to conflict, human rights violations and increase in refugee flows, significantly influenced by Russia's aggressive policy that led to the illegal annexation of Crimea and the Russian-Ukrainian armed conflict in Donbas (Vovk, 2021, p. 72).

The EU wanted to strengthen its foreign relations by including Ukraine in the Eastern Partnership program. After all, perhaps the most important of the countries included in the program for the EU is Ukraine. The geographical importance of the country, the facts that it acts as a corridor between Russia and the EU, and that it is the largest country in the program make it valuable. This partnership was implemented in Brussels in 2008 (Senay, Kocak, 2014, p. 18).

European Union – Ukraine Association Agreement

Before the association agreement with the EU, Ukraine wanted to solve some problems in its internal affairs. They considered one of the most important of these the fight against corruption. After the 2014 Honor Revolution, the Ukrainian government included the fight against corruption among its main objectives. Ukraine's score in the NGO Transparency International's Corruption Perceptions Index has gradually improved. According to 2020 data, it was ranked 117th among 180 countries. This was a success. Especially, the United States of America and other international stakeholders support Ukraine's anti-corruption reforms (Congressional Research Service, 2021, p. 8).

The Ukrainian crisis broke out when the Association Agreement with Ukraine, which was planned to be signed, was rejected by the then President Yanukovych. Ultimately, the Association Agreement with the EU was signed in 2014 under the new president Poroshenko (Keskin, 2017, pp. 88–91). This treaty provides both political and free trade opportunities. In cooperation in sectors such as energy, education, and transportation, Ukraine has been one step closer to the EU. In this direction, economic relations develop with the Deep and Comprehensive Free Trade Agreement (DCFTA), which is a part of the Association Agreement. This agreement also eliminates import tariffs as well as prevents other trade restrictions. Thus, Ukraine and EU markets will be integrated (European Parliament, 2014).

Thanks to DCFTA, the country's economy was expected to get closer to the EU and benefit from its renewal and development thanks to the reforms to be made. The possibility of foreign investment to come to the country could increase, business areas could be expanded and access to the Ukrainian market could be simpler (Delegation of the European Union to Turkey, 2016). The DCFTA section of the Association Agreement was applied provisionally from 1 January 2016. The Partnership Agreement provided a close bond of partnership based on respect for democratic principles, common values, good governance, the rule of law, fundamental freedoms, and human rights. This is an arrangement that aims at political unity and economic integration. It can bring many more developments (Delegation of The European Union to Ukraine, 2016).

The Association Agreement signed between the EU and Ukraine consists of two chapters. The political part of the agreement was signed by the Prime Minister of Ukraine Arseniy Yatsenyuk at the summit meeting held on 21 March 2014. The economic part of the agreement was subsequently signed by the President of the country, Petro Poroshenko, at the meeting held on 27 June 2014. This treaty is the largest international legal document in the history of Ukraine. It is also the largest to-date agreement concluded by the EU with a third country (Government Portal, 2022).

During the Volodymyr Zelenski period, negotiations with the EU at the level of leaders began to yield positive outcome. According to the results of an analysis performed by the Ukrainian national platform, the Eastern Partnership Civil Society Forum gave Ukrainians the opportunity to access the EU programs, participate in small and medium-sized enterprises, educational initiatives, and cultural programs, enhanced development of infrastructure of Ukrainian cities in projects aimed at developing research and innovation, increased academic mobility, supported trade and visa liberalization, and made many other positive contributions (Vovk, 2021, pp. 80–81).

As a result of these arrangements, when the latest situation of the relationship between Ukraine and the EU is examined, approximately 3 million Ukrainian citizens have travelled to the EU without a visa since June 2017. More than 15 billion euro have been spent on supporting Ukraine's reform process since 2014 (The Diplomatic Service of the European Union, 2021). As to the trade volume between Ukraine and the EU in the recent past, there has been a decrease in export and import rates in 2020, especially due to the COVID-19 crisis. Between January 2020 and December 2021, the EU imports from Ukraine increased by around 55%, while imports increased by around 17% (Eurostat, 2022).

Conclusions

The balance policy followed by Ukraine has been instrumental in the country's rapprochement with Russia on the one hand, and with the EU on the other. The existing division of the people in the country has always been a determining factor in the elections to be held or in the determination of the policies to be carried out. The distinction between those in power who are pro-Russian or pro-EU has caused foreign policy preferences to change from time to time. For example, while the Yanukovych period was dominated by the Russian sympathies, the desire to pursue a pro-Western policy increased with the coming to power of Yushchenko. The country's desire to improve its relations with the EU or Russia has been a problem in itself. Russia responded to Ukraine's request for the EU membership by annexing Crimea. For this reason, the EU has imposed various sanctions on Russia.

Since 2014, the Ukrainian government has prioritized closer integration with the EU and NATO. The constitutional amendment of 2019 is an example. In addition, President Zelenski's first foreign visit was to Brussels. Here he made firm statements, including a statement reconfirming his strategic route to achieve full membership in the EU and NATO (Congressional Research Service, 2021, p. 25).

Ukraine has not only improved its relations with the EU, but recently also with NATO. It developed its defence plan in line with the NATO standards. An excellent example of the Ukrainian cooperation is the creation of the Lithuanian-Polish-Ukrainian Brigade known as LITPOLUKRBRIG together with the EU member states. It is named after the Great Hetman Konstantin Ostrogsky, and includes units from the Lithuanian, Polish, and Ukrainian armed forces. In addition, it is important to pay attention to the growth of the European countries share in regional development. The share of Ukrainian arms and military equipment exports increased from 3% in 2013 to 16% in 2020 (Vovk, 2021, p. 81).

Today, as a result of the Ukraine's pro-Western policies, and especially its desire to become a member of NATO, Russia attacked the territory of Ukraine and killed thousands of innocent people. Russia does not want a NATO member state in close vicinity to its own territory. Especially, it strongly opposes the requests to enter NATO by the countries belonging to the former Soviet Union and publicly threatens them. Such threats were made against Bosnia and Herzegovina.

In addition to these developments, at the Brussels Summit in June 2021 the NATO member countries announced that they are significantly concerned about the international processes related to the systematic competition of assertive and authoritarian groups for security in the Euro-Atlantic region. They aimed at drawing attention to the increasingly aggressive policies of Russia and China (Vovk, 2021, p. 70). Explaining these decisions, they especially pointed to the military exercises carried out by Russia on the Ukrainian border and to modernizing the arms industry. Nuclear weapons tests have been effective. In addition, Russia has been actively developing weapons in recent years. Belarus and the EU carried out their military exercises directly on their borders.

Shortly after this summit, an article was published in July 2021, expanding on Putin's earlier claims. He argued that Ukraine has ties to Russia and that Russians and Ukrainians are "one" (Congressional Research Services, 2021, p. 14).

Especially in the first months of 2022, the accumulation of military vehicles and equipment on the Russian-Ukrainian border, in addition to the establishment of a mobile hospital and blood center, brought serious concerns. While the European and American media talked about Russia's invasion of Ukraine being prepared, the Russian media described it as an ordinary military exercise. But the statements made by Russia were once again justified. On 24 February 2022, Russia started the war by attacking Ukraine.

Ukraine is an indispensable value for both the East and the West. Both its location and being on energy transmission lines make it valuable. Russia, one of the EU's largest trading partners, meets the EU's energy needs through Ukraine. There is a dependency on Russia, especially in the field of oil and natural gas. It seems that the energy factor constitutes one of the basic criteria that will determine the future of the country. Today, the embargoes that the big states of the EU, such as Germany and France, apply against Russia in energy and other commercial areas are deeply shaking the economic security of Russia. As a result of these embargoes, the Russian stock market remained closed for about three weeks. On the other hand, one Euro saw approximately 114–115 Russian ruble levels. In addition to all these sanctions, the EU imposes heavy economic sanctions to prevent this unfair war by confiscating the properties of various Russian oligarchs. To make a general assessment, the EU carries out more moderate policies for Ukraine. For example, it tries to attract the country to its side with the financial aid it provides in the economic sense. Russia, on the other hand, has been implementing harsher policies against Ukraine, and this has moved to the extent of war. Russia sees Ukraine as the territory of the former Soviet Union. In addition, Russia sees security according to a model of a *matryoshka* doll and wants to dominate the geographical regions close to itself.

While Ukraine aims to join the EU, the EU sees Ukraine not as a candidate country, but as a valuable neighbouring country with which it can establish close relations. As a result of this war,

Ukraine's membership process has started. The EU Commission President Ursula Von der Leyen delivered the same form to Ukrainian President Vladimir Zelenski during her visit to Kyiv on 8 April. In parallel, the EU includes Ukraine in the Eastern Partnership initiative according to the European Neighbourhood Policy. The EU – Ukraine Association Agreement, which was signed afterwards, is another important step. In a way, the EU's acceptance of Ukraine as a candidate country may cause it to conflict with Russia. Therefore, the reaction of the EU towards Russia's policies against Ukraine, perhaps, in the long run, will cause the EU to change its ideas for the inclusion of Ukraine in the Union. Considering all that has happened from the past to the present, it is highly uncertain where Ukraine will position itself in the future at the last stage.

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Citation

Local Government and Primary Health Care service delivery in South-Western Nigeria 2010–2015

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Keywords: local government, Primary Health Care, service delivery, south-western Nigeria

Abstract Primary Health Care (PHC) is implemented by the local governments in Nigeria based on the notion that healthcare service delivery is efficient when it is closer to people. With the adoption of analytical research through secondary sources of data, this study assesses the local government performance in PHC service delivery and examines the challenges it faced in the south-western Nigeria states of Lagos, Ogun, and Ondo in the period of 2010–2015. The findings showed various PHC programmes implemented by the local governments of the selected states, which include Maternal and Child Reduction, Investment Case and *Eko* Free Malaria in Lagos state, *Araya* and *Gbomoro* in Ogun state, as well as the Mother and Child Hospitals and *Agbebiye* in Ondo state. However, findin gs showed similar challenges encountered by the local governments, which include multiplicity of stakeholders in the disbursement of PHC funds, lack of fiscal decentralisation of revenue to the local government, diversion of PHC funds as compared to other projects, and poor community participation in PHC, irregularity of or interference in the local government elections by the state government, exclusion and deviation from the key principles of PHC and lack of continuity in PHC programmes implemented. The general conclusion from the study is that the local government performance in PHC service delivery is weak. In order to enhance the present local government performance in PHC, the study recommends for the application and implementation of local government constitutional role in the management of the PHC service delivery.

Introduction

The argument in favour of the local governments stems from the notion that the autonomy and citizen participation in service delivery will promote good governance. The extent of the division of power has important implications for the functioning of local governments in the service delivery (Okojie, 2009; Arowolo, 2010; Abe, Monisola, 2014). Decentralisation provides opportunity for the local government to implement social services in urban areas, communities, and villages. The local governments possess political power to make bye-law and draft policies, fiscal power to collect and use revenue, and administrative power to provide and maintain social services (Abbas, Ahmed, 2012; Agba, Akwara, Idu, 2013). When social services are decentralised to the local governments, the quality of citizens' welfare improves.

Local government is a practical tool for rural change and development through social service delivery. The proximity of local government to the grassroots provide necessary conditions for valuable and viable delivery of social services required by the citizens (Adeyemi, 2013; Agba, Ogwu, Chukwurah, 2013; Ejue, Madubueze, 2014; Odalonu, 2015). Among other functions of local government there is the implementation and maintenance of Primary Health Care (PHC) in order to improve the welfare of the people. In particular, health, education, adequate nutrition, and sanitation are elements of PHC which also determine the Human Development Index (HDI). As a philosophical framework intended to guide the development of health care service delivery, PHC is designed to improve the health of citizens in order to attain the state's welfare (World Bank, 2011; Alenoghena, Aigbiremolen, Abejegah, Eboreime, 2014).

The acceptance of PHC as the basis for strengthening the health care system and improving health care service delivery was established through the Alma Ata Declaration in 1978 by the World Health Organisation in the present-day Kazakhstan. PHC is the basis of health care. It also ensures continuity of care. It is the first step to health care which provides community health care services (Reid, 2008; Abdulraheem, Olapipo, Amodu, 2012). The idea of introducing PHC is to care for common health problems in the community by providing preventive, curative, and rehabilitative services and bringing health care to the reach of the people (World Health Organization, 1978; Olise, 2007).

The National Health Policy of 2004 and 2016 viewed the PHC as an instrument of health policy implemented at the local government level in the community health centres and health posts. The division of the local government into 7 and 15 health districts/wards provides the opportunity for the citizens to maximise the benefits of the health care decentralisation, where the local people participate in PHC service delivery through the establishment of the Village Development Committee (VDC) and District Development Committee (DDC) (Gupta, Gauri, Khemani, 2004; Federal Ministry of Health, 2010; Abdulraheem et al., 2012). PHC service delivery focuses on prevailing health challenges in the community such as the maternal and child healthcare, malaria, typhoid and fever, as well as the method of prevention and control such as promoting adequate nutrition, prevention and control of locally endemic and epidemic diseases, immunisation against infectious diseases, and provision of essential drugs (World Health Organisation, 1978; Adeyemo, 2005; Mike, 2010; Alenoghena et al., 2014).

In Nigeria, local governments' performance in PHC service delivery has been well documented and the result of health care services rendered at the grassroots level have been criticised. Studies showed that local government performance in PHC service delivery is characterised by in appropriate organisation which results in poor health care, lack of appropriate strategies to identify targeted beneficiaries, lack of funds, and shortcomings in the way resources are allocated, expensed, and managed (Adeyemo, 2010; Agba et al., 2013; Jamo, 2013; Ejue, Madubueze, 2014). Also, extant literature showed that PHC facilities in Nigeria are in deplorable state as medical equipment are either absent or obsolete, medical personnel are inadequate, especially in rural areas, as well as the roles overlap among the levels of government with regard to the finance and implementation of PHC (Gupta, 2004; Abdulraheem et al., 2012; Obansa, Orimisan, 2013). However, there is a dearth of empirical research on local government and PHC service delivery in south-western Nigeria with specific reference to the period of 2010–2015.

Therefore, the objectives of this study are to assess the performance of local governments in PHC service delivery in south-western Nigeria in the period of 2010–2015 and examine the challenges they faced. The significance of this study is that it provides evidence for the evaluation and assessment of the existing PHC local government programme in Nigeria and also serves as blueprint for the realisation of effective and efficient performance of local governments in PHC service delivery. In addition to the introduction, this study conceptualises local government and PHC, and offers general overview of the PHC service delivery by the Nigeria local government. The subsequent sections describe the study area and methodology, explain the performance assessment and challenges faced by the local governments in PHC service delivery in the selected states, discuss the findings and offer conclusions.

The local government in Nigeria

The importance of local government in a democratic system cannot be overemphasised. As a government that is closer to the people, the local government is a form of local administration which maintains law and order, provides social services, and encourages the participation of people, thereby promoting grassroots development (Oviasuyi, Idadasiraojie, 2010). Goss (2001) claimed that the local government acts in a geographically defined area with a substantial degree of autonomy, separate legal entity, and power to provide certain public services, as well as power to collect tax and generate revenue. Jamo (2013) viewed the local government as a territorial sovereign entity that regulates its own affairs. In essence, local government is a basic instrument for rural transformation and development through the delivery of welfare services to rural and urban communities.

The political power of the local government empowers the representatives with the control of local affairs and also encourages active participation of the people in political activities (Sunday, Chinedum, 2014). The local government is mostly accessible to the people and it is also the first point of service delivery to the people. For example, King (1988) compared the relationship between the local government and the nation-state to that between a cell and the human body. According to him, the smallest cell, if unhealthy, could spread disease to the body. In essence, dysfunctional

local government in a nation-state could results in inadequate and poor social welfare services, exclusion of the local people from governance, and unresponsive government, all of which reduce state legitimacy and good governance. The local government serves as an instrument for the delivery of social services, it facilitates provision of social welfare and enables the locals to participate in the government (Chapman, 2010; Arowolo, 2010).

The local government is one of the levels of the government in a federal system, which is endowed by law with the control over local affairs (Onah, Amujiri, 2010). It is a segment of a constituent state that is established by law to provide social services and hold public affairs in its jurisdiction. As one of the levels of government which addresses the needs and aspirations of the citizens, local government extends administrative and political control to rural communities and also enhances the participation of people in governance at the grassroots level (Adesopo, 2011; Amujiri, 2012). In other words, local government is the basis of local authority with the power to act independently of external control from other levels of government.

Primary Health Care (PHC)

Primary Health Care (PHC) as a concept was formed by 134 countries, including Nigeria, in the Declaration of Alma Ata, Kazakhstan, on 12 September 1978. The international conference which was organised by the World Health Organisation (WHO) described the PHC as an attainment of health which is based on:

> (…) practical, scientifically sound, and socially acceptable methods and technology, made universally accessible to individuals and families in the community through their full participation and at a cost which the country can afford to maintain at every stage of their development in the spirit of self-reliance and self-determination.
>
> (World Health Organization, 1978)

The WHO further identified five universal principles of PHC which are essential for health care, namely: equity, community participation, use of appropriate technology, self-reliance, and intersectoral collaboration. In other words, PHC is a grass roots approach which addresses the major health problem in the community through the provision of rehabilitative and curative services, as well as equitable health care for the people (Adeyemo, 2005; Olise, 2007; Abdulraheem et al., 2012). Primary Health Care, according to Abiodun (2010) is the provision of community healthcare which includes immunisation, maternal healthcare, child healthcare, and control of local endemic diseases, including malaria, tuberculosis, typhoid, diarrhea, as well as prevention of HIV/AIDS infection. Ajayi (2014) argued that PHC is the first stage of health care in the national health system, as well as the first stage of continuing healthcare system which brings healthcare as close as possible to the reach of the people at home and workplace.

Fundamental to the principle of PHC is the notion that major diseases in rural communities are preventable. This is essential for the functional PHC service delivery and constitutes a shift from centralised to decentralised healthcare provisions for rural areas where community diseases

are frequent (Paina, Peter, 2012). The PHC framework recognised the importance of healthy lifestyles as a means of disease prevention through supportive care for individual's health condition in the community. PHC is functional in health system where its values and principles are adopted into policy and implemented in practice (Eguagie, Okosun, 2010). To this end, the World Health Organisation (1978) outlined the following objectives of PHC:

a) accessibility and availability of health services to the reach of the people at home and work place;

b) prevention of major health problem that cause death and disease at a cost that the community can afford;

c) community must have the ability to maintain and effectively used the technology deployed, and

d) community must fully participate in the planning, delivery and evaluation of health services.

Reid (2008) described PHC as a unit of healthcare system which provides health services to the community. The minimum PHC service delivery identified by World Health Organisation (1978) includes safe water and basic sanitation, health education, and the method of preventing and controlling prevailing health challenges, growth monitoring and adequate nutrition, treatment of common diseases, provision of essential drugs, immunisation against infectious diseases, maternal and child healthcare including family planning, special care for high risk and referral support, and community mental health care. According to Obioha and Molale (2011), the essence of PHC service delivery is to ensure that health is affordable, accessible, and acceptable to the community. PHC service delivery is based on community participation through the establishment of village health committee which comprises local residents chosen without regard to political affiliations, sex, age or religion (Federal Ministry of Health, 2010). As a form of accountability mechanisms, the community is expected to actively participate in planning, organising and managing PHC service delivery in their respective villages (World Bank, 2010; Arowolo, 2010). Through this process, social, political and economic conditions of the community subsequently improve, as health status increase.

Moreover, referral system is one of the major factors that determine the functioning of PHC service delivery in the local government. Referral system in PHC is a bottom-top approach usually from the lowest level of care to the highest. Referral system is activated when the patient requires protracted inpatient care, expert advice or technical examination that is not available at the health centre. Eshemokha (2019) claimed that a two-way referral system is an organised practice in PHC where there is a relevant feedback communication from the higher health centre that receives the patient, to the lower health centre after the patient has been treated. A two-way referral system promotes idea exchange, knowledge transfer between health care providers, and also improves health care service delivery which decreases morbidity and mortality rates (Enabulele, Enabulele, 2018).

Primary Health Care service delivery by the Nigerian local governments

In Nigeria, issues related to health care as part of the welfare function of the state is enshrined in the concurrent legislative list. This implies that all the tiers of government are responsible for the management and functioning of health care service delivery. In practice, the National Health Policy provides guidelines on how this is effected by dividing the health care system into tertiary, secondary and primary health care with the federal, state, and the local governments in charge of each level, respectively. Before the introduction of PHC and during the independence in 1960, Nigeria operated a health care system which focused on curative medicine rather than preventive medicine (Aregbeshola, Khan, 2017). Between 1975 and 1980, Nigeria developed National Basic Health Services Scheme (NBHSS) which was regarded as the basis of PHC approach. The scheme focused on the provision of health facilities, training of health workers and community participation, intersectoral cooperation and the use of local technology in the provision of health care (Obionu, 2007; Mike, 2010; Fatusi, 2015). In 1985, PHC which was modelled after the Alma Ata Declaration was first adopted in fifty-two local government areas, while in 1988 the comprehensive national health policy, focused on PHC, was introduced.

The 1988 PHC programme put emphasis on preventive medicine and health care at the local government level, exclusive breast feeding, free immunisation for children, compulsory recording of maternal death, and a campaign against HIV/AIDS (Uneke, Ndukwe, Oyibo, Onwe, 2010; Aregbeshola, Khan, 2017). In 1992, Nigeria established the National Primary Health Care Development Agency (NPHCDA) for the purpose of continuing and sustaining the PHC agenda (Fatusi, 2015; Lambo, 2015). With the return of democracy in 1999, the constitution as amended empowers the local government to provide and maintain PHC service delivery. PHC service delivery is politically headed by supervisory councillor for health and administratively by health coordinator. The health coordinator reports to the supervisory councillor, while the supervisory councillor reports to the chairman of the local government who is elected by the people (National Primary Health Care Development Agency, 2004). The roles of each level of government in the functioning of PHC service delivery are explicitly stated in the 1999 Constitution. The federal government is assigned the responsibility of overall policy formulation and evaluation, the state government provides logistical support such as personnel training, planning and operation, whereas the local government is responsible for the execution and provision of PHC service delivery (Federal Ministry of Health, 2004; National Primary Health Care Development Agency, 2007).

The three types of health care that are recognised in Primary Health Care system are the Basic Health Clinic (BHC), the Primary Health Centre (PHC), and the Comprehensive Health Centre (CHC). The BHC is expected to serve communities with a population of 2000 to 5000 people, the PHC should serve communities with a population of 5000 to 20,000 people, whereas the CHC is expected to serve communities with a population of more than 20,000 people (Ogunniyi et al., 2000; Federal Ministry of Health, 2010). The BHC consists of a small health facility with limited resources and staff, which comprise Community Health Extension Worker (CHEW) who offers treatment of simple ailments and refers the serious health cases to the PHC and CHC. The PHC is managed by a Community Health Officer (CHO) or an experienced nurse,

with more staff and beds (usually 10) for admitting maternity and adult health cases which are referred from the BHC. The CHC, which is controlled by a doctor, has at most about 30 beds for admitting maternity, paediatric, and adult health cases, including patients referred from the PHC. In essence, the CHC is expected to have four PHC in its catchment area, while the PHC is expected have two BHC in its catchment area.

The performance of PHC service delivery in Nigeria largely depends on community participation and a support from community leaders. With the establishment of the National Primary Health Care Development Agency (NPHCDA) in 1992, community participation was first institutionalised through the creation of a Health District (HD) which was made up of committees, such as the Village Development Committee (VDC) and District Development Committee (DDC). The VDC consists entirely of the community members and is coordinated by the village head. The DDC is made up of a chairman of the VDC in the district and the representatives of the health sectors in the community with explicit duties and responsibilities of managing health activities at the village level (World Health Organisation, 1992; Ogunniyi et al., 2000). The introduction of the Ward Health System (WHS) and Ward Minimum Health Care Package (WMHCP) in year 2000 and 2001, respectively, utilised the existence of electoral ward for the delivery of PHC. Unlike the HD, which made use of a district difficult to demarcate, the WHS was based on the division of local government into 10 to 11 political wards as the basic unit for the delivery of the PHC services.

The WHS facilitate political and community support through the establishment of Ward Development Committee (WDC) and Health Facility Committee (HFC) which consist of selected community residents (National Primary Health Care Development Agency, 2004). In general, the responsibilities of the VDC, WDC and HFC include creation of demand, ensuring proper conduct of health services, community support, and participation in the implementation of PHC programme. The WHS which represents the current national health strategy makes use of a ward as the smallest geographical political structure comprising 10,000 to 30,000 population for the delivery of PHC services in a village health post located at a place usually donated by the community and managed by a Village Health Worker (VHW) (Eshemokha, 2019). The WMHCP introduced in Nigeria include control of transmittable diseases, mother and child care, adequate balanced diet, non-transmittable diseases, health education and community participation (National Primary Health Care Development Agency, 2007). The WMHCP represents the least of health care provision and treatment that PHC centres in Nigeria should provide to the citizens.

In order to avoid fragmentation and ensure integration of PHC, Nigeria formulated the Primary Health Care Under One Roof (PHCUOR) policy in 2011. The essence of the PHCUOR is to avoid duplication of functions and multiplicity of stakeholders in federal, state, and local governments in the management of PHC (Aregbeshola, Khan, 2017). The 2016 national health policy, which is the focus of the existing health care system, emphasised the importance of PHC to protect, prevent and restore the health of citizens in order they thrived in well-being. The policy is a legal framework for the organisation, provision and management of PHC service delivery in Nigeria. However, several challenges have hampered effective implementation of PHC at the local government level. Olukoya, Coker, Osibogun and Oshin (2014) maintained that delay in budget approval

and release of incomplete funds is among other factors that impede local government performance in PHC service delivery.

Local government performance in PHC service delivery is also undermined by structural and institutional weaknesses in health sector, poor management services, inadequate staff and funds. Olaniyan and Lawanson (2010) and Odalonu (2015) revealed that the introduced WMHC Ps are not effectively implemented as most wards in Nigeria offer little basic health services as a result of inadequate health personnel, medical equipment and pharmaceuticals needed to provide effective PHC service delivery. While the prevalence of fake drugs and substandard products make it complex, local governments lack technical and managerial capacity to manage PHC which resulted in inadequate and poor infrastructural facilities and obsolete equipment, particularly in rural areas and villages (Owoeye, Adedeji, 2013; Alenoghena, 2014). More so, PHC system is facing the challenges of gross mismanagement, corruption at the local government level, inadequate health professionals, as well as dearth of data which render planning, policy implementation and health care system weak (Sanda, 2014; United States Agency for International Development, 2014; Oyeneyin, Aladenola, 2019). It is on this basis that this study evaluated the performance and examined the challenges of PHC service delivery in south-western Nigeria in the period of 2010–2015.

The area of study and methodology

The performance of local government in Primary Health Care (PHC) service delivery in Nigeria varies across states. The study area focused on the South-West which was purposively selected out of the six geopolitical zones in the country. The South-West comprises six states out of the thirty-six states in Nigeria. In order to ensure proper and adequate representation of samples, three states were selected from the South-West through simple random sampling technique – Lagos, Ogun, and Ondo states. While these selected states have different historical background in culture, values and native language, similar characteristics of these states are that the indigenes are mainly from Yoruba race which is among the major ethnic groups in Nigeria, and speak Yoruba and English as official languages.

The state capital of Lagos is located at Ikeja. The state was created on 27 May 1967 through the Transitional Provision Decree No. 14. Lagos state is divided into three senatorial districts, 20 Local Government Areas (LGAs) and 47 Local Council Development Areas (LCDAs). The state shares boundaries with Ogun state and the Benin Republic. The state capital of Ogun is located at Abeokuta. The state was created on 3 February 1976 from the old western region. Ogun state is divided into three senatorial districts, 20 Local Government Areas (LGAs) and 37 Local Council Development Areas (LCDAs). The state shares boundaries with Lagos and Oyo states, and the Benin Republic. Ondo state capital is located at Akure. The state was created on 3 February 1976 from the old western region. Ondo state is divided into three senatorial districts and 18 Local Government Areas (LGAs). The states hares boundaries with Ogun, Osun, Ekiti, Kogi, and Edo states.

This study made use of analytical research design which is relevant for the understanding of cause-effect relationships between two or more variables (local government and PHC). Analytical

research design involves critical thinking and evaluation of the fact where the researcher explains why and how a particular phenomenon functions. The research design is appropriate for assessing the performance and examining the challenges of local government in PHC service delivery through the use of existing data which remove vagueness in deduction and conclusion. In essence, secondary data from desk review, official documents and scholarly works formed the basis of analysis and discussion. Local government performance assessment and challenges in PHC service delivery was systematically addressed under the sub-themes of three of the selected states.

Performance assessment and challenges of Primary Health Care service delivery in Lagos state (2010–2015)

The Lagos state board of PHC was created through the health sector reform law of 2006. In compliance with part six of the health reform, a PHC board of 12 members was inaugurated in February 2009 for the purpose of planning, budgeting, monitoring, and evaluation of PHC programme, as well as retreating, promoting, training, and staff development of PHC employees (Lagos state Ministry of Health, 2010). Lagos state has over 329 PHC facilities excluding private health providers and the health policy thrust includes free community-based PHC services, provision of comprehensive secondary healthcare services, and institution of the health sector reform programme (Lagos State Ministry of Health, 2010; Mohammed, 2020). Minimum health package of care in Lagos state include control of transmittable diseases (malaria, tuberculosis, HIV/AIDS), child survival (immunisation and diarrhea diseases), maternal and newborn care, nutrition, non-transmittable diseases prevention, health education, and community mobilisation (Lagos State Ministry of Health, 2012).

The period under review witnessed the launch of some PHC programmes in Lagos state. In 2012, for example, the state launched Maternal and Child Reduction programme for the purpose of reducing high maternal and infant mortality rates in line with the Millennium Development Goal 4, 5 and 6 (Lagos State Ministry of Health, 2012). In order to make health care accessible to the citizens, the state government embarked on a programme called Investment Case. This programme was initiated to reduce disparity in health care and also seek to extend coverage of essential health services to the citizens (United Nations International Children Education Fund, 2012). Also, the Eko Free Malaria programme was adopted in Lagos as a medical treatment for malaria and the provision of each household with at least two insecticides nets (Baje, 2014). The *Eko* Free Malaria programme is aimed to lessen the disease burden of malaria. The period under review also experienced the continuous implementation of school health programme. The programme was designed for school pupils to promote healthy lifestyle and obtain adequate benefit from education where the environment is conducive for learning (Ileyemi, 2022).

The environment of Lagos state poses significant challenges to PHC service delivery. Being the most populous state in Nigeria, Lagos has the PHC facilities pressed for space as a result of large number of patients. The World Bank (2011) and Mustapha et al. (2012) revealed that most health centres in Lagos cannot provide 24 hours service as a result of irregular supply of

electricity and water, as well as lack of drug in health centres and poor transparency and administrative mechanism for purchasing and dispensing of drugs. Moreover, fraudulent practice persists among the nurses to purchase drugs on private basis and sell them to patients at high prices (Onwuzoo, 2021). As argued by Otokpa (2018) and Olanipekun (2013), most PHC facilities and equipment are locked up and not in use after commissioning, referral system is less functioning and majority of workers are ad-hoc private trained health workers. Moreover, the National Bureau of Statistics (2014) showed that private health centres provide about 60–70% of health services in the states, most of which are unregulated.

Community participation in PHC service delivery in Lagos state is below expectation. Abimbola et al. (2015) claimed that community participation in PHC is weak because of the limited knowledge of the community who perceived the PHC facilities as government owned properties which reflect in the preference for informal health providers. Aregbeshola, Onigbogi and Khan (2017) and Uzochukwu et al. (2018) were of the opinion that interference from the federal and state governments have contributed to inaccessibility of funds by local government for the implementation of PHC. Similarly, Olukoya, Coker and Osibogun (2014) maintained that the long waiting period when the budget is announced and when funds are released make it difficult for local government to plan for PHC progamme. In addition, the roles of PHC stakeholders are not aligned, coordination system is weak, and there is a lot of data which resulted in weak performance in the planning and policy formulation of health system in Lagos state (United States Agency for International Development, 2014).

Performance assessment and challenges of Primary Health Care service delivery in Ogun state (2010–2015)

With the exclusion of private health facilities, there are over 200 PHC centres owned by Ogun state which provide mother and child health services and simple health care (Ayinla, 2017). Among others, Ogun state health policy thrust is based on improving the public health institutions and enhancing their utilisation to promote quality life, on renewing and strengthening the delivery of PHC for the purpose of promoting child survival strategies such as immunisation, creating alternatives for health care fund through the Ogun state health insurance scheme, and enhancing public/private participation in health care service delivery (Ogun State Ministry of Health, 2010). The state minimum health package of care include prenatal care, immunisation, promotion of health activities like nutrition services, health education, behavioural change in communication relating to transmittable and non-transmittable diseases, simple health care services such as deworming and anti-malaria treatment, tuberculosis treatment under Directly Observed Treatment Scheme (DOTS), and support for HIV/AIDS treatment (Ogun State Ministry of Health, 2010).

The period under review witnessed some implementation of PHC service delivery in Ogun state. In conjunction with the African Health Markets for Equity (ALME), Ogun state launched the *Araya* (Good Health) programme in 2014 in order to facilitate better health care for the people. The programme which was a re-launched Community-Based Health Insurance Scheme

(CBHIS) was designed to provide access to PHC for certain groups of people, such as the pregnant mothers, children under age of five and the elderly people aged 70 and above (Pharm Access Foundation, 2015). Moreover, *Araya* was a pro-poor health care programme which subsidized cost of health care for the citizens (Channels Television, 2016). Also in 2014, the state government launched *Gbomoro* (Child Sustenance) programme as a cash transfer scheme for pregnant mothers to be used as transport allowance for every antenatal visit to health centres in order to increase access to basic health and nutrition (PM News, 2014; The Nation Newspaper, 2014).

Onohwosafe (2014) showed that only a quarter of the state health facilities have minimum requirement health care package and only about 10% of the households have one mosquito net. Suleiman and Onaneye (2014) claimed that the population that lack basic PHC services reside in rural areas, which constitutes about 40–50% of the total population. Corroborating this viewpoint, Israel and Sunday (2013) argued that the proportion of PHC facilities that provide basic emergency services, including obstetric, is low in the *Odogbolu* (rural) local government areas, relative to health facilities and services available in *Ifo* (urban) local government areas. Ogun state also faces the challenge of shortage of medical personnel to meet the citizens' demand for health care. A survey of health care personnel in 2012 indicated one doctor per 2992 patients and one nurse per 1411 patients (National Bureau of Statistics, 2014). In the same vein, Olatunji (2021) argued that only about 215 nurses are available in the state to manage about 448 health facilities.

The public-private partnership is weak and the major services provided by public and private health centres are clinic-based with little extension to home and communities (Adeneye, Musa, Afocha, Adewale, Ezeugwu, 2021). Many PHC facilities in Ogun state are not properly sited and the referral system is weak, which consequently diminished the continuum of health care system. The proliferation of medicine vendors and drug hawkers further increase the problem of irrational use of drugs in the state (Premium Times, 2012; Omonona, Obiasesan, Aromolaran, 2015). Moreover, the approved funds for PHC are often not used for the intended purpose. Adeneye, Musa, Afocha, Adewale and Ezeugwu (2021) showed that the PHC funds are diverted to other projects which consequently reduces the local government performance in PCH service delivery. Other challenges confronting local government performance in PHC service delivery in Ogun state include bureaucratic bottleneck and lack of transparent procedure in the disbursement of PHC funds which resulted in mismanagement and poor delivery of PHC programmes (Onohwosafe, 2014; Tijani, Okareh, Soladoye, Adegboyega, 2015).

Performance assessment and challenges of Primary Health Care service delivery in Ondo state (2010–2015)

The Ondo State Primary Health Care Development Board (OSPHCDB) was signed into law in 2012 with the aim to develop and ensure adequate functioning of the PHC in the state. The health policy of the state put emphasis on the eradication of diseases to enable the citizens live a social, economic, and productive life, and thereby attaining the national target of increasing the life expectancy of the citizens (Ondo State Ministry of Health, 2010). About 75.2% of the health facilities are used for PHC and 21.0% of them are used for secondary health care (Ondo State Ministry of Health, 2010).

Before 2010, the World Bank claimed that Ondo state had the worst maternal and child health indices in south-western Nigeria due in part to high rate of maternal mortality and morbidity (Mimiko, 2017). In response to this, the state embarked on several PHC programmes in 2010. For example, the Mother and Child Hospital was initiated as a free medical care for women and children between age zero and five in order to reduce delay in health care provided at health centres (Fatusi, 2013; Gbadamosi, 2018). The Mother and Child Hospital was established to help the state accomplish the Millennium Development Goals (MDGs) which focused on the reduction of mother and child mortality (Mimiko, 2016). In 2014, the state launched the *Agbebiye* (Safe Motherhood) policy as a free medical care programme for pregnant women and children below age of five in order to reduce mother and child mortality rate in the state (Fajimbola, 2012; Oyeneyin, Aladenola, 2019). More so, the programme was used to discourage and stop traditional and medical practitioners from carrying out pregnancy delivery in their homes, and also to provide financial remuneration and skills acquisition for traditional birth attendants on every pregnant woman who is referred to the government hospitals where there are skilled birth attendants (Mimiko, 2016; Oyeneyin, Osunmakinwa, Olagbuji, 2021).

Owoeye and Adedeji (2013) maintained that rapid urbanisation in Akure has largely resulted in crowded dwellings, high pollution rate, poor household facilities, and a lackadaisical attitude of people toward unhygienic environment. This condition has led to increase in the spread of diseases such as malaria, typhoid fever, diarrhea, cholera, dysentery, and other transmittable diseases prevalent in the state (Owoeye, Sogbon, 2012). Moreover, the state health system and governance strategies are weak due in part to lack of continuity in the PHC programme, lack of accountability and transparency in PHC fund, and inadequate allocation of funds for health care which resulted in poor delivery of PHC services at the local government level (Owoeye, 2013). The World Health Organisation (2011) reported that Ondo state health care system lacked effective integration and linkages in the health services.

The cost of healthcare services in Ondo state government hospitals is higher compared with the private health facilities. Owoyemi (2014) showed that the cost of health care services and hospital admission in Ondo state has been on increase and patients often have little or no money left to procure required drugs. Meanwhile, most of the free health care schemes which provide succour and relief to mothers and children only function at the Mother and Child Hospital and are not applicable to patients in general hospitals (Adedeji, Folorunsho, 2014; Gbadamosi, 2018). Also, the Mother and Child Hospital scheme was managed and controlled directly by the office of the governor and not the state ministry of health which raises the concern for transparency and accountability in health care services provided in the state (World Health Organisation, 2011). Other challenges of local government in PHC service delivery in Ondo state, as noted by Owoeye (2013), include multiplicity of PHC stakeholders with, overlapping responsibilities from the state and local governments, lack of local government autonomy, inadequate health facilities and weak community participation, diversion of the PHC funds to other projects and poor monitoring of the PHC funds by the local government.

Discussion of findings

This study assessed the local government performance in PHC service delivery, and examined the challenges of local government in the performance of PHC service delivery in south-west Nigeria. Based on the analysis of the objective from the three selected states, it is necessary to discuss some the findings of the study. One important findings of the study which similarly impedes the performance of local government in PHC programme in the selected states is the lack of local government autonomy. In Nigeria, the constitution stipulates that local government elections are to be conducted by the State Independent Electoral Commission (SIEC). However, local government elections are hardly conducted and tenure for local government chairmen differs from state to state. In some states where local government elections are conducted, the executive governor of the state plays the role of a godfather who anoints a preferred candidate that wans the chairmanship election. Where the governor's candidate does not win the election, councillors impeachment power is used by the state governor to intimidate the local government chairman to the extent he could no longer perform his constitutional duties. In many states where local government elections are not conducted or postponed, the state governor established caretaker or transition committees for the local government (Nwanna, 2014; Ojo, 2021).

The removal of the Ondo state governor in 2009 based on the court of appeal judgment regarding the 2007 governorship election led to the replacement of another governor who nullified the local government election that was conducted in 2007 and established caretaker committees to oversee local government administration. The local government election that was later conducted in 2011 was fuelled by violence, rigging and snatching of ballot box which paved the way for the ruling political party to install their preferred candidates (Wilson, 2013). In Lagos and Ogun states, the 2012 local government elections were described as fraudulent by the opposition political parties and also recorded low turnout as voters boycotted the election as a result of imposition of candidates. In some cases, voters were denied the right to vote for their preferred political parties (Olatunji, 2013). In essence, irregularity of or interference in the local government elections affect legitimacy of the local government chairman or appointed caretaker chairman to implement PHC programmes and also reduce community participation in PHC service delivery since the elected local government chairman or the appointed caretaker chairman are alien to the people.

Findings from this study also revealed the lack of local government financial autonomy as one of the major bane confronting the performance of local government in PHC service delivery. Local government financial autonomy includes fiscal autonomy to impose and collect tax, constitutional inclusion in federal allocation and 10% of state internally generated revenue (Nwanna, 2014; Abdulhamd, Chima, 2015). However, these three sources of revenue hardly complement the performance of local government in PHC service delivery. Page and Wando (2022) claimed that tax and rates collected by local governments and federal government allocation to local government are diverted to state government projects as against the provision of health facilities in the local government. Moreover, the State Joint Local Government Account (SJLGA) established in section 162 (6) of the 1999 constitution as amended adversely affected the performance of local government in the provision of service delivery as funds and allocation meant for local government are

delayed or inadequate. Although the local government now receives federal allocation directly, state governments often demand expensive charges which consequently affect the provision of social service in the local government (Page, Wando, 2022). Studies by Owoeye (2013) and Tijani et al. (2015) corroborated that delay, mismanagement and unintended use of PHC fund in Ondo and Ogun states resulted in poor provision of PHC service delivery in the local governments. Similarly, it was revealed that local government dependence on Lagos state government resource allocation impedes the functioning of the PHC where most health facilities in rural areas are unable to carry out administrative activities due to insufficient funds (Mustapha et al., 2012; Olukoya et al., 2014).

Another findings from this study which limit the performance of local government in PHC service delivery in the selected states is the exclusion and deviation from the key principles of PHC. While it is necessary that programmes are initiated and developed in line with the frameworks of PHC, exclusion and deviation from key principles of PHC could result in inadequate and poor provision of PHC service delivery. This study identified various PHC programmes implemented in the local government of the selected states which include Maternal and Child Reduction, Investment Case and *Eko* Free Malaria in Lagos state, *Araya* and *Gbomoro* in Ogun state, as well as the Mother and Child Hospitals and *Agbebiye* in Ondo state. However, these programmes are limited in totality as key principles of PHC like essential health care, equity, community participation, use of appropriate technology, and intersectoral collaboration are missing. Essential health care is scarce in PHC facilities, there is concentration of PHC facilities in urban areas to the disadvantage of the rural areas and community participation in PHC service delivery is weak (Owoeye, 2013; Isreal, Sunday, 2013; Abimbola et al., 2015).

More so, technological equipment is obsolete or lacking and the health care collaboration with other sectors like the economy is weak, as households make use of quacks nurses who provide care as result of lack of resources to attend PHC facilities or purchase drugs (Olaniyan, Lawanson 2010; Otokpa, 2018). Similarly, the findings showed that PHC programmes are not implemented to provide for continuity and consolidation of health care service delivery. In the states like Ondo and Ogun, where different political parties have governed, several PHC programmes were discontinued and abandoned without completion, while new programmes which are totally different from successive administration are initiated. In other words, abandonment and discontinuation of PHC projects and programmes consequently affect service delivery and community participation.

Conclusions

As a grassroots health care system, PHC promote healthy lifestyle and ensures that diseases, injury, and short-term health issues and most chronic conditions are managed at the local government level. In Nigeria, local government is accountable for the implementation of PHC service delivery which includes healthcare (illness diagnosis and treatment plan, immunisation, pregnancy care, delivery and postnatal care, drug dispensing and dosage administration), growth monitoring and adequate nutrition, safe water, sanitation, health education, special care for high risks, and referral support. Since most of these provisions are available in the PHC centres, local government

performance is a major factor in determining the quality and standard of health care service delivery in Nigeria. This study assessed the performance of local government in PHC service delivery, and examined the challenges of local government in PHC service delivery in the south-western states of Lagos, Ogun, and Ondo in the period of 2010–2015.

This study found out that while there are various established PHC programmes in the selected states, the local governments performance are similarly affected by implementation gap in the delay of PHC funds, diversion of PHC funds to other projects, poor community participation, lack of financial autonomy of local government, as well as multiplicity of the PHC management bodies in the states and local governments. The study concluded that the local government performance in PHC service delivery is weak as a result of the lack of local government autonomy, exclusion and deviation from the key principles of PHC and lack of continuity in PHC programmes implemented by the local government. As regards the continuity of government PHC programmes most of the programmes are no longer in existence, lack adequate facilities and have obsolete medical equipment. More so, lack of local government autonomy and state government diversion of local government and PHC funds to other projects, as well as lack of accountability and transparency in PHC department, has further weakened local government performance in PHC service delivery. Drawing from this conclusion, the study recommended that local government should be accorded constitutional role in the management of PHC service delivery. This will enable the local government to control and monitor PHC fund solely for efficient service delivery without interference from the state government. This will also enable the application of local government autonomy where PHC funds will be directly accessible to the local government for efficient service delivery. The stakeholders involved in the disbursement of the PHC funds should be streamlined in order to reduce delay, resource leakages, and less time-consuming process in the disbursement of PHC by the local government.

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Citation

Znaczenie pomocy rozwojowej w polityce Królestwa Hiszpanii w latach 1995–2020

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Słowa kluczowe: Hiszpania, Maghreb, pomoc, Unia Europejska

Abstrakt Zakres przedmiotowy artykułu obejmuje zagadnienia związane z hiszpańską pomocą rozwojową, realizowaną zarówno przez organy krajowe, jak i w ramach Unii Europejskiej. Pomoc ta koncentruje się przede wszystkim na regionie Maghrebu, Afryki Subsaharyjskiej oraz na państwach Ameryki Łacińskiej. Hiszpania angażuje się w prace Banku Światowego, Afrykańskiego Funduszu na rzecz Rozwoju (FAD – Fondo Africano de Desarrollo) oraz Agencji Narodów Zjednoczonych ds. Uchodźców Palestyńskich na Bliskim Wschodzie (ang. UNRWA; hiszp. Agencia de Naciones Unidas para los Refugiados de Palestina en Oriente Próximo). Diametralna zmiana sytuacji zdrowotnej na świecie sprowokowała sprzeczne działania. Z jednej strony pojawiły się wyzwania, którym można sprostać tylko globalnie. Wzmocnieniu uległy sieci współpracy na poziomie regionalnym – na przykład w Afryce. Z drugiej strony nie brakowało reakcji o charakterze protekcjonistycznym, a nawet nacjonalistycznym.

The Importance of Development Aid in the Policy of the Kingdom of Spain in the Years 1995–2020

Keywords: Spain, Maghreb, aid, European Union

Abstract The objective scope of the article covers issues related to Spanish development aid, implemented both by national authorities and within the European Union. It focuses primarily on the Maghreb region, Sub-Saharan Africa and Latin America. Spain is involved in the work of the World Bank and the African Development Fund (FAD – Fondo Africano de Desarrollo) and the United Nations Agency for Palestinian Refugees in the Middle East (UNRWA – Spanish: Agencia de Naciones Unidas para los Refugiados de Palestina en Oriente Próximo). The dramatic change in the health situation in the world has provoked contradictory actions. On the one hand, there have been challenges that can only be tackled globally, there has been a strengthening of cooperation networks at the regional level - for example in Africa, even nationalist.

Wprowadzenie

Celem artykułu jest porównanie programów pomocy rozwojowej, w realizację których była zaangażowana Hiszpania. Oprócz analizy zakresu działań wskazane było porównanie odbiorców pomocy. Zastosowano przede wszystkim metodę historyczno-porównawczą.

Sformułowano następującą hipotezę badawczą: hiszpańska pomoc rozwojowa koncentruje się na regionie Maghrebu. Pytania badawcze ogniskują się wokół dwóch zagadnień: kooperacja Hiszpanii z Unią Europejską oraz samodzielne kształtowanie polityki zagranicznej i roli lidera w regionie. 1) Jakie znaczenie przy kreacji pomocy rozwojowej miały wydarzenia arabskiej wiosny?; 2) Jaki jest wpływ Unii Europejskiej na Hiszpanię i jej działania?; 3) Jakie są możliwe scenariusze na przyszłość?

W artykule zasadne było zastosowanie metody wnioskowania, w której można czerpać z wiedzy już istniejącej, tworząc przy tym tzw. nową wiedzę – wywnioskowaną lub pośrednią. Definicja wnioskowania w najprostszym ujęciu to proces myślowy polegający na tym, że przyjmuje się jako podstawę rozumowania pewne zdanie (twierdzenie) jako prawdziwe i za tym pośrednictwem dochodzi do przeświadczenia o prawdziwości innego, nowego zdania (wyprowadza się nowe prawdziwe twierdzenie) (Cieślarczyk, 2003, s. 55). W rezultacie im więcej mamy potwierdzonych jednostkowych zdań o faktach, zdań obserwacyjnych, tym bardziej ich uogólnienie, zdanie teoretyczne, tj. hipoteza, jest wiarygodne. „Prawdopodobieństwo wniosku uzyskanego w drodze indukcji niezupełnej, głoszącego, że przedmiot klasy a (którą w pewien sposób obierzemy) ma cechę b, będzie tym większe, po pierwsze, im więcej przedmiotów danej klasy przebadamy i stwierdzimy, że wszystkie one mają tę samą cechę, po drugie, im bardziej różnorodne będą te przedmioty, po trzecie, im bardziej będą się różniły warunki, w których dokonujemy obserwacji" (Krajewski, 1998, s. 79). „Jeżeli poprzednik jest uogólnieniem następnika, wtedy tego typu redukcję nazywa się »indukcją«; jeżeli natomiast to nie ma miejsca, wtedy mówimy o redukcji nieindukcyjnej" (Bocheński, 1992, s. 103). W konsekwencji na podstawie dokumentów oraz programów regulujących funkcjonowanie i dystrybucję pomocy rozwojowej można wyciągnąć wnioski, że mimo problemów ekonomicznych zaangażowanie w pomoc państwom Maghrebu, Sahelu i Ameryki Południowej jest ważnym elementem polityki zagranicznej Hiszpanii. Jedną z przesłanek motywującą do podjęcia niniejszego tematu były zapisy Agendy 2030 oraz strategie hiszpańskiego MSZ.

Wstęp do zagadnienia polityki rozwojowej

W interpretacji Unii Europejskiej politykę rozwojową można zdefiniować jako trzon polityki zewnętrznej UE. „Jej celem jest ograniczenie, a ostatecznie wyeliminowanie ubóstwa i ma ona kluczowe znaczenie dla UE w kontekście Agendy 2030 ONZ na rzecz zrównoważonego rozwoju. Wśród jej celów wymienić należy wspieranie zrównoważonego rozwoju, obronę praw człowieka i demokracji, osiąganie równości płci, propagowanie pokoju i inkluzywnych społeczeństw oraz rozwiązywanie problemów dotyczących ochrony środowiska i klimatu" (cyt. za: https://www.europarl.europa.eu/facheets/pl/sheet/163/ogolny-przeglad-polityki-rozwojowej). Pomoc rozwojowa może być definiowana jako instrument polityki zagranicznej. „Instrumenty polityki zagranicznej

odpowiadają za komponenty finansowe i operacyjne polityki zagranicznej UE. Pomagają uporać się z sytuacjami kryzysowymi i zapewnić pokój, bezpieczeństwo, przestrzeganie prawa i porządku" (cyt. za: https://ec.europa.eu/info/departments/foreign-policy-instruments_pl).

Większy zakres oddziaływania ma pomoc humanitarna, w ramach której „podejmuje się działania wychodzące naprzeciw potrzebom powstałym w wyniku katastrof spowodowanych przez człowieka oraz w rezultacie klęsk żywiołowych. Dyrekcja Generalna ds. Europejskiej Ochrony Ludności i Pomocy Humanitarnej Komisji Europejskiej finansuje pomoc humanitarną oraz koordynuje politykę i działania państw członkowskich. Parlament i Rada działają jako współprawodawcy w dziedzinie kształtowania polityki UE dotyczącej pomocy humanitarnej a także uczestniczą w globalnej debacie na temat skuteczności operacji humanitarnych" (cyt. za: https://www.europarl.europa.eu/factsheets/pl/sheet/164/pomoc-humanitarna).

W konsekwencji wszelkie działania Hiszpanii, zarówno pośrednie w ramach UE, jak i bezpośrednie (przez własne organów), stanowią element jej polityki rozwojowej, a w szerszym znaczeniu – polityki publicznej.

Polityka Unii Europejskiej – zarys

Jednym z wiodących instrumentów finansowych, w którym uczestniczyła także Hiszpania, był Śródziemnomorski Program Pomocy w Rozwoju Gospodarczym – MEDA. Na adresatów pomocy początkowo wybrano NGO[1], władze lokalne, a także agencje państwowe. Powołano również Europejski Komitet Ekonomiczno-Społeczny, czyli spotkania rad społeczno-gospodarczych w wymiarze raz na sześć miesięcy.

Program MEDA został ustanowiony w czerwcu 1995 roku. Nabrał mocy prawnej w wyniku przyjęcia przez RUE rozporządzenia o nr 1488 o finansowych i technicznych środkach pomocy dla reform struktur gospodarczych i społecznych w ramach Partnerstwa Eurośródziemnomorskiego z dnia 23 lipca 1996 roku. Celem programu MEDA było wzmocnienie stabilności politycznej i demokracji w zakresie przestrzegania pokoju oraz bezpieczeństwa, wspieranie stworzenia SWH, a także ustanowienie związków kulturowych i społecznych (Rozporządzenie Rady WE, 1996).

Podczas konferencji w Marsylii zadecydowano o jego kontynuacji, ustanawiając MEDA II (27 grudnia 2000 roku na podstawie rozporządzenia nr 2698). MEDA II przypominał programy działające na rzecz krajów Europy Środkowej i Wschodniej, jak PHARE czy TACIS. Obejmował zarówno współpracę bilateralną, jak i wielostronną w regionie. Dystrybuując pieniądze, brał pod uwagę czynniki takie jak wielkość populacji kraju, dochód *per capita*, gospodarczą zdolność absorpcyjną, tempo wprowadzania reform strukturalnych, postęp w negocjowaniu eurośródziemnomorskich umów stowarzyszeniowych. Na podstawie artykułu 5 sformułowano trzy kryteria brane pod uwagę przy rozdzielaniu środków finansowych. Były to: priorytety beneficjenta, zdolność absorbcji kapitału oraz postęp na drodze reform strukturalnych. Celem był długoterminowy wzrost gospodarczy, rozwój społeczny i współpraca między państwami (art. 2). Rada Unii

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[1] NGO (ang. *non-governmental organization*) oznacza organizację pozarządową.

Europejskiej przyjmowała kwalifikowaną większością głosów trzyletnie programy na poziomie krajowym i regionalnym. Inicjatorem działań była Komisja Europejska. Granica finansowania wynosiła 80% wartości projektu. Resztę trzeba było pokryć z własnych źródeł.

MEDA I obowiązywał w latach 1995–1999. Odnosił się do czterech obszarów: reform strukturalnych (15%), przemian gospodarczych (30%), finansowania projektów – równowaga społeczno-ekonomiczna (41%), finansowania projektów regionalnych (14%). Sformułowano trzy rodzaje pomocy: 1) granty na rozwój infrastruktury (np. północnych obszarów wiejskich w Maroku) oraz pomoc techniczna; 2) pożyczki (np. subsydiowane na ochronę środowiska – *subsidised loans*) ze stopą 3% i niskim ryzykiem; 3) bezpośrednie przekazywanie rządom funduszy dla zrównoważenia budżetu bądź finansowanie importu strategicznie ważnego dla danego kraju.

Podczas spotkania ministrów w Walencji, w kwietniu 2002 roku, utworzono w ramach EBI specjalny oddział ds. modernizowania zasobów, zwłaszcza z sektora prywatnego. Poparto także ideę stworzenia Banku Eurośródziemnomorskiego, mającego za zadanie pogłębienie współpracy ekonomicznej i prowadzenie działań na rzecz wolnego przepływu usług. Wśród pozostałych priorytetów znalazło się: zbudowanie rynku zbytu na artykuły rolne z krajów północnej Afryki, usprawnienie działania MEDA, pogłębienie współpracy w transporcie, turystyce i telekomunikacji. W Neapolu w grudniu 2003 roku zaakceptowano stworzenie Eurośródziemnomorskiej Karty dla Przedsiębiorców, której celem miał być rozwój małych i średnich przedsiębiorstw.

Z kolei w ramach EBI w marcu 2002 roku powstał program FEMIP[2] – Instrument Eurośródziemnomorskiego Partnerstwa i Inwestycji – który przekazał pomoc dla prywatnego sektora. Udzielał wsparcia w formie pomocy technicznej, prywatnego kapitału i pożyczek. Do grudnia 2008 roku przekazano 8,5 mld euro. Na VII Konferencji *Badania, Rozwój i Innowacja, Klucz do Zrównoważonego Rozwoju*, która odbyła się w dniach 14–16 marca 2010 roku w Tunisie, sformułowano główne wyzwania. Wyszczególniono m.in.: podniesienie znaczenia badań i rozwoju oraz innowacji, stworzenie nowego planu działania mającego na celu powstanie innowacyjnych firm w regionie. Konferencji przewodniczył Muhammed Youini, tunezyjski Minister ds. Rozwoju i Międzynarodowej Kooperacji, oraz wiceprzewodniczący EBI, odpowiedzialny za FEMIP, Philippe de Fontaine-Vive. Działając zgodnie ze swoim przeznaczeniem, Europejski Bank Inwestycyjny udzielał państwom Maghrebu niskooprocentowanych pożyczek. Liderem w odbiorze, tudzież wykorzystywaniu pomocy, była Tunezja. Porównując wysokość wsparcia *per capita* (w latach 1995–2002), Tunezja otrzymała 113 euro, Maroko 42,5 euro, a Algieria 36 euro. Lider przeznaczał środki głównie na reformy strukturalne i rozwój sektora prywatnego. Z kolei Algieria i Maroko preferowały inwestycje w budowę infrastruktury obszarów wiejskich, a także rozwój transportu.

Państwa Maghrebu są również beneficjentami pomocy rozwojowej. W 2002 roku dwa z nich znalazły się w pierwszej dziesiątce pod względem uzyskanych funduszy (Tunezja na 8. miejscu – 261 mln USD, a Maroko na 9. – 226 mln USD). W roku 2005 Maroko ulokowało się na 3. miejscu

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[2] FEMIP (ang. *Facility for Euro-Mediterranean Investment and Partnership*) oznacza Instrument Eurośródziemnomorskiego Partnerstwa i Inwestycji. W 2005 roku Komisja zapowiedziała utworzenie Eurośródziemnomorskiego Banku Rozwoju, który miał zastąpić FEMIP. Za jego pośrednictwem państwa otrzymywały średnio pożyczki w wysokości 2 mld euro rocznie.

z kwotą 258 mln USD, a w 2006 roku kraj ten znajdował się na 2. miejscu ze wsparciem wynoszącym 319 mln USD (Bagiński, 2009). Wzrost środków związany był z rozszerzeniem UE w 2004 roku, bowiem środki przekazywane dla państw Europy Środkowo-Wschodniej trafiały odtąd do państw afrykańskich.

Hiszpańskie inicjatywy w dziedzinie pomocy rozwojowej

Rok 2015 był wyznaczony jako termin realizacji Milenijnych Celów Rozwoju (MCR), będących pierwszym zbiorczym programem walki z ubóstwem i głodem na skalę globalną. Osiągnięto znaczne, choć nierównomierne postępy w realizacji milenijnych celów rozwoju. Zatwierdzono także trzy umowy znaczące dla polityki rozwoju: Agenda na rzecz Zrównoważonego Rozwoju 2030 (hiszp. Agenda 2030 para el Desarrollo Sostenible), Agenda Działań z Addis Abeby w sprawie finansowania rozwoju (hiszp. Agenda de Acción de Addis Abeba sobre Financiación del Desarrollo – AAAA) i paryskie porozumienie w sprawie zmian klimatu (hiszp. Acuerdo de París sobre cambio climático) (V Plan Director, 2018).

W 2017 roku Hiszpania zatwierdziła Narodowy Plan Działań na rzecz Biznesu i Praw Człowieka (hiszp. Plan de Acción Nacional de Empresas y Derechos Humanos) we współpracy z Sekretariatem Stanu do spraw Współpracy Międzynarodowej oraz Ameryki Łacińskiej i Karaibów (hiszp. Secretaría de Estado de Cooperación Internacional y para Iberoamérica y el Caribe – SECIPIC) oraz z Ministerstwem Spraw Zagranicznych i Współpracy (hiszp. Ministerio de Asuntos Exteriores y de Cooperación – MAEC). Wskazano w nim na następujące cele: wzmocnienie narzędzi promujących i ułatwiających wdrożenie hiszpańskiego zobowiązania do ochrony praw człowieka przed jakimkolwiek negatywnym wpływem; monitorowanie zobowiązań podjętych w ramach współpracy międzynarodowej i unijnej; wzmocnienie przewagi konkurencyjnej hiszpańskich firm.

W ostatnich latach podstawą dla realizacji hiszpańskiej pomocy rozwojowej był plan działań (V Plan Director de la Cooperación Española 2018/2021 – V PD). Wyróżniono w nim państwa najsłabiej rozwinięte oraz kraje o niskich i średnich dochodach, które są traktowane preferencyjnie (m.in. pomoc budżetowa i kredyty niskooprocentowane). Z kolejnymi 12 krajami o średnich dochodach stosunki były stopniowo przebudowywane. Najważniejsza była współpraca techniczna, pożyczki i dialog polityczny. Dla uchodźców z Sahary Zachodniej uruchomiono specjalne programy pomocy humanitarnej. W V PD Etiopia, Mali, Mauretania, Mozambik, Niger i Senegal oraz Haiti to kraje najsłabiej rozwinięte, z poważnymi brakami, niskim poziomem rozwoju. Oficjalna pomoc rozwojowa, którą otrzymują, jest jednym z ich głównych źródeł finansowania zewnętrznego i stanowi znaczący procent ich dochodów. Są to kraje wrażliwe na wahania cen surowców. Ich handel obejmuje podstawowe produkty konsumpcyjne. Nękane są katastrofami klimatycznymi, konfliktami zbrojnymi, nielegalnymi migracjami, napięciami politycznymi i słabościami instytucjonalnymi. To sprawia, że generalnie są bardziej uzależnione od pomocy rozwojowej niż od innych form finansowania, takich jak środki wytworzone wewnętrznie.

Pomoc finansowa jest realizowana przede wszystkim za pośrednictwem Programu Masar (hiszp. Programa de Acompañamiento a los procesos de gobernanza democrática en el mundo árabe; arab. *droga*). Został on przygotowany przez hiszpańskie MSZ oraz przez Hiszpańską Agencję ds. Kooperacji Międzynarodowej dla Rozwoju (AECID), Casa Árabe i Casa Mediterráneo. Jego cele to: walka z korupcją, tworzenie nowych miejsc pracy, równość kobiet i mężczyzn, przestrzeganie praw człowieka, proces demokratyzacji, modernizacja, budowanie państwa prawa, przeciwdziałanie radykalizacji młodzieży i ryzyku wykluczenia społecznego oraz promocja kultury pokoju. Wprowadzono także inne rodzaje interwencji, które nie są bezpośrednio związane z reformami politycznymi i społecznymi (gospodarka wodna czy walka ze zmianami klimatycznymi). W związku z problemem migracyjnym powstał również Plan GRECO (hiszp. Programa Global de Regulación y Coordinación de la Inmigración y Extranjería en España). Jego priorytetem było realizowanie działań w poszczególnych krajach:

– Maroko – promowanie praw kobiet poprzez dialog społeczny, wsparcie Trybunału Konstytucyjnego, wsparcie modernizacji administracji publicznej, respektowanie praw człowieka w więzieniach,

– Mauretania – walka z niewolnictwem oraz biedą,

– Tunezja – wsparcie obszarów wiejskich.

Algieria (od IV planu generalnego [2013–2016]) przestała być krajem priorytetowym dla oficjalnej pomocy rozwojowej. Hiszpańska współpraca została przeprojektowana tak, aby Algieria stała się częścią krajów arabskich, w których oferowany jest Program Masar. W roku 2015 rozdysponowano następujące środki wśród krajów Mghrebu: Algieria – 2,06 mln euro; Libia – 0,23 mln euro; Maroko – 14,13 mln euro; Mauretania – 14,72 mln euro; Tunezja – 2,91 mln euro.

Oprócz Ministerstwa Spraw Zagranicznych tematyką współpracy międzynarodowej w omawianym zakresie zajmuje się wspomniana AECID (hiszp. Agencia Española de Cooperación Internacional para el Desarrollo). Głównym efektem prac tej agencji są plany współpracy. Pierwszy został opracowany na lata 2001–2004. Wśród obszarów priorytetowych dla współczesnej hiszpańskiej polityki znalazły się państwa z obszaru Morza Śródziemnego: Maroko, Mauretania i Sahara Zachodnia. Kraje te wskazano w grupie 23 państw świata jako tzw. *país de asociación = país prioritorio*. Podstawę prawną funkcjonowania AECID stanowi art. 1 „Ley 28/2006, de 18 de julio, de Agencias Estatales para la mejora de servicios públicos", który również powołał te agencje. Z kolei art. 17 wskazuje na strukturę organizacyjną: „La Dirección de Cooperación con América Latina y el Caribe"; „La Dirección de Cooperación con África y Asia"; „La Dirección de Cooperación Multilateral, Horizontal y Financiera"; „La Dirección de Relaciones Culturales y Científicas"; „La Secretaría General"; „La Oficina de Acción Humanitaria"; „Dirección General de Planificación y Evaluación de Políticas para el Desarrollo del MAEC (DGPOLDE)" (BOE, 2011). Zgodnie z ustawą 40/2015 o reżimie prawnym sektora publicznego, AECID została zobligowana do zatwierdzenia zmiany statusu prawnego przed październikiem 2019 roku, aby przyjąć formę organu autonomicznego. Zgodnie ze statutem agencja została utworzona w celu promowania pełnego korzystania z rozwoju, rozumianego jako podstawowe prawo człowieka, przy czym walka z ubóstwem jest częścią procesu budowania tego prawa (PD, 2021). Zasadniczo głównym

celem pomocy jest rozwój kraju, a w przypadku pożyczek udzielenie warunków preferencyjnych, które są poddawane przeglądowi przez Komitet Pomocy Rozwojowej. Pomoc może być udzielana bezpośrednio krajom partnerskim lub przez wielostronne instytucje rozwoju (OMUDES).

W 2021 roku hiszpańska współpraca rozwojowa opierała się na zasadzie jedności, solidarności władzy i skoordynowanych działań globalnych pod przywództwem Narodów Zjednoczonych. Organizacja Narodów Zjednoczonych podkreśliła konieczność współpracy, aby stworzyć silniejsze systemy opieki zdrowotnej, ochrony socjalnej, które działają dla wszystkich, a także zobowiązanie do ekologicznej naprawy świata (Comunicación Anual, 2021). Podstawą dla działań było uchwalenie „Estrategia de Respuesta Conjunta de la Cooperación Española a la crisis de la COVID-19". Hiszpańska polityka skupiła się na działaniach na rzecz krajów i społeczności, które najbardziej cierpią z powodu nierówności i ubóstwa. Zgodnie z Hiszpańskim V PD (Planem Działań na rzecz Wdrażania Agendy 2030), pomoc ma być wykorzystywana do promowania realizacji celów zrównoważonego rozwoju i przyczyniania się do eliminacji ubóstwa, zmniejszania nierówności, obrony praw człowieka i podstawowych wolności oraz promowania wzrostu gospodarczego, ochrony planety i walki ze zmianą klimatu. Inicjatywy są realizowane zarówno przez administrację centralną, jak i na poziomie regionalnym przez rządy Wspólnot Autonomicznych oraz uniwersytety, sektor prywatny, podmioty lokalne oraz organizacje pozarządowe. AECID ma 48 jednostek współpracy zagranicznej (UCE) rozmieszczonych w Ameryce Łacińskiej i na Karaibach, w Afryce i Azji. Spośród nich 31 to Biura Współpracy Technicznej (OTC), 13 to Centra Kultury (CC), a 4 – zlokalizowane w Boliwii, Kolumbii, Gwatemali i Urugwaju – to Centra Szkoleniowe (CF). Organ zarządzający hiszpańską polityką międzynarodowej współpracy na rzecz rozwoju został utworzony 11 listopada 1988 roku jako Jednostka Prawa Publicznego przy Ministerstwie Spraw Zagranicznych i Współpracy. Łącznie agencja zatrudnia ponad tysiąc pracowników, zarówno w swojej centrali, jak i w centrach za granicą. Organami zarządzającymi AECID są: Prezes i Rada Prezesów. Członkowie Rady powoływani są przez ministra spraw zagranicznych i współpracy, a ich głównym zadaniem jest zatwierdzanie celów i planów działania oraz budżetu. Podczas Szczytu Organizacji Narodów Zjednoczonych w sprawie przyjęcia Agendy Zrównoważonego Rozwoju 2030, który odbył się we wrześniu 2015 roku, polityczni przedstawiciele państw członkowskich zobowiązali się do wyeliminowania ubóstwa, co jest pierwszym z 17 Celów Zrównoważonego Rozwoju. Strona hiszpańska uznała ten cel za swój własny i umieściła go jako centralny element działań, jak pokazują programy współpracy opracowane z Organizacją Narodów Zjednoczonych. Hiszpania była również jednym z głównych promotorów Milenijnych Celów Rozwoju (MCR) dzięki utworzeniu MDG-F, którego wkład sfinansował 130 wspólnych programów w 50 krajach, wspierając prawie dziewięć milionów osób. Różnorodne wymiary ubóstwa wymagają skoordynowanych działań w celu zwalczania przyczyn na różnych frontach. Hiszpania mierzy się z tym wyzwaniem dzięki takim instrumentom, jak Fundusz Współpracy na rzecz Wody i Sanitacji (FCAS), w który zainwestowała 800 mln euro, aby towarzyszyć krajom partnerskim w Ameryce Łacińskiej w budowie kluczowej infrastruktury do walki z ubóstwem. Ponadto aktywnie uczestniczy w międzynarodowych inicjatywach, takich jak Globalny Fundusz na rzecz Walki z AIDS, Gruźlicą i Malarią czy GAVI Alliance, mających na celu poprawę stanu zdrowia osób najbardziej poszkodowanych.

Tabela 1. Porównanie wybranych programów pomocy rozwojowej

Nazwa programu	Odbiorcy	Data obowiązywania
MEDA I	państwa basenu Morza Śródziemnego	1996–1999
MEDA II	państwa basenu Morza Śródziemnego	2000–2006
FEMIP	państwa basenu Morza Śródziemnego	2002–
Program Masar	kraje Maghrebu i Afryki Subsaharyjskiej	2010–
Agenda 2030	kraje Maghrebu i Afryki Subsaharyjskiej	2015–

Źródło: opracowanie własne.

Najnowsze inicjatywy

W kwietniu 2021 roku Hiszpańska Rada Ministrów wyraziła zgodę na zatwierdzenie Strategii Działań Zagranicznych na lata 2021–2024 (Estrategia de Acción Exterior 2021–2024). Wspomniana Strategia Działań Zagranicznych zawiera uporządkowany, sektorowy i geograficzny wyraz priorytetów i średnioterminowych celów działań zagranicznych, a także wykaz celów organów, agencji i podmiotów publicznych do realizacji za granicą. Strategia została przygotowana zgodnie z zapisami art. 35 ustawy 2/2014. Po raz pierwszy został do niej dołączony raport ekonomiczny, który w sposób szacunkowy określa ilościowo środki, jakie zostaną przeznaczone na realizację zaplanowanych w strategii działań. Raport ten został przedstawiony w Komisji Delegatury Rządu ds. Gospodarczych 17 marca 2021 roku. Strategia opiera się na czterech kierunkach działania:

I. Promowanie praw człowieka, demokracji, bezpieczeństwa, feminizmu i różnorodności jako punktów odniesienia dla działań Hiszpanii na świecie.

II. Zdecydowana promocja nowego globalnego modelu społeczno-gospodarczego, opartego na zasadach integracji, sprawiedliwości i równości.

III. Zdecydowana obrona bardziej zrównoważonej, nadającej się do zamieszkania planety.

IV. Aktywizm na rzecz poprawy globalnego zarządzania poprzez promowanie większej integracji regionalnej oraz odnowionego i wzmocnionego multilateralizmu.

Zapowiedziano również wdrożenie Planu Działań na rzecz Transformacji Cyfrowej MAUC, ze szczególnym uwzględnieniem modernizacji służb konsularnych, reformę systemu udziału obywateli hiszpańskich za granicą, opracowanie planu działań na rzecz poprawy wizerunku kraju, opracowywanie konkretnych inicjatyw promujących dyplomację publiczną, kulturalną i edukacyjną oraz naukową i technologiczną, sprzyjających bardziej strategicznym i skoordynowanym działaniom, monitorowanie i opracowywanie Planu Działań na rzecz Wdrażania Agendy 2030, opracowanie nowej wizji współpracy hiszpańskiej, która obejmuje zatwierdzenie nowej ustawy o współpracy międzynarodowej na rzecz zrównoważonego rozwoju, wzmocnienie i modernizację współpracy finansowej oraz opracowanie Wspólnej Strategii Reagowania Współpracy Hiszpańskiej na Kryzys Covid-19, przestrzeganie zobowiązania do przeznaczenia 0,5% dochodu narodowego brutto na oficjalną pomoc rozwojową, przygotowanie i monitorowanie VI Planu Współpracy Hiszpańskiej na lata 2022–2025, inauguracja Dorocznego Forum Współpracy Rozwojowej, reaktywacja

i wzmocnienie instrumentów formułowania i wewnętrznej koordynacji przewidzianych w ustawie 2/2014 z dnia 25 marca o działaniu i służbie zagranicznej państwa, a w szczególności Rady Polityki Zagranicznej i Rady Wykonawczej ds. Polityki Zagranicznej, promowanie bardziej wszechstronnej współpracy z firmami hiszpańskimi poprzez wspieranie ich w działaniach zagranicznych.

W zakresie terytorialnym strategia zawiera następujące priorytety: wzmocnienie spotkań bilateralnych z Niemcami, Francją, Włochami, Polską i Portugalią, wykorzystanie ich potencjału oraz pogłębienie mechanizmów regularnej współpracy, rozwój nowych stosunków współpracy ze Zjednoczonym Królestwem w ramach umowy po brexicie i zawarcie umowy między UE a Zjednoczonym Królestwem w sprawie Gibraltaru, promowanie strategicznych relacji dwustronnych z grupami subregionalnymi (Benelux, Grupa Wyszehradzka, kraje bałtyckie, kraje EFTA), wdrożenie wielowymiarowej strategii mającej na celu wzmocnienie stosunków między UE a Ameryką Łacińską i Karaibami, w tym dalsze wysiłki na rzecz ratyfikacji umowy UE–Mercosur i modernizacja umów z Meksykiem i Chile, wzmocnienie Konferencji Iberoamerykańskiej, poszukiwanie wyjścia z kryzysu w Wenezueli, promowanie i monitorowanie bieżących inicjatyw mających na celu ułatwienie dostępu do finansowania dla krajów o średnich dochodach w regionie oraz utrzymanie solidarności w UE w odpowiedzi na kryzys zdrowotny i gospodarczy wywołany przez COVID-19, wzmocnienie dialogu ze wszystkimi krajami regionu oraz prowadzenie konsultacji politycznych i spotkań na wysokim szczeblu z krajami Maghrebu, zwłaszcza z Marokiem i Algierią, poprzez konkretne strategie współpracy z obydwoma państwami, poprawa południowego sąsiedztwa UE i Unii dla Śródziemnomorza, promowanie wysiłków ONZ na rzecz osiągnięcia rozwiązań politycznych w Saharze Zachodniej, Libii i Palestynie, wzmocnienie stosunków transatlantyckich zarówno na szczeblu europejskim, jak i dwustronnym, wzmocnienie działań w dyplomacji parlamentarnej, naukowej, klimatycznej i kulturalnej, otwarcie Instytutu Cervantesa w Los Angeles, wzmocnienie współpracy z krajami Sahelu oraz wspieranie ich procesów rozwoju gospodarczego i społecznego, konsolidacji instytucjonalnej, wdrożenie Programu Działań III Planu dla Afryki i wdrożenie jego procedury oceny.

Strategia przygotowana przez Ministerstwo Spraw Zagranicznych, Unii Europejskiej i Współpracy (Ministerio de Asuntos Exteriores, Unión Europea y Cooperación – MAUC) to plan oddziaływania na arenie światowej poprzez cztery zasady: 1) „Więcej Europy", z bardziej zintegrowaną, autonomiczną UE, wiodącym graczem na świecie; 2) „Lepszy multilateralizm"; 3) „Strategiczna dwustronność" w ustalaniu priorytetów stosunków dwustronnych; 4) „Zaangażowanie i solidarność" poprzez nową wizję współpracy na rzecz rozwoju.

Podsumowanie

W obliczu globalnych wyzwań i powszechnych zagrożeń Hiszpania angażuje się w cztery kierunki działań: a) promowanie praw człowieka, demokracji, bezpieczeństwa, a także różnorodności jako punktów odniesienia dla działań Hiszpanii na świecie; b) dyplomacja ekonomiczna w celu zdecydowanego promowania nowego globalnego modelu społeczno-gospodarczego, opartego na zasadach integracji i sprawiedliwości; c) dyplomacja klimatyczna na rzecz zdecydowanej

obrony zielonej planety; d) dyplomacja wielostronna w celu poprawy globalnego zarządzania i promowania większej integracji regionalnej oraz odnowionego i wzmocnionego multilateralizmu.

Wbrew pozorom hiszpańska pomoc rozwojowa koncentruje się na regionie Afryki Subsaharyjskiej, Ameryki Łacińskiej i Południowej, a dopiero później na regionie Maghrebu. Taka hierarchia dotyczy przede wszystkim zagadnień związanych z walką z głodem oraz z ubóstwem. Przewartościowanie w dystrybucji pomocy ma miejsce w zakresie podniesienia poziomu edukacji oraz jakości wymiaru sprawiedliwości. W tych sektorach dominującym odbiorcą jest region Maghrebu. Wydarzenia arabskiej wiosny zdynamizowały działania na rzecz państw arabskich. Konieczne okazało się większe zaangażowanie w promocję demokracji i praw człowieka. Niestabilna sytuacja w Algierii oraz w Tunezji czy wojna domowa w Libii ukazały, że dotychczasowa pomoc była niewystarczająca, a siła oddziaływania radykalnych odłamów islamu (dżihadyzmu salafickiego) jest coraz większa. Działanie Unii Europejskiej jest kompatybilne z polityką Hiszpanii. Niemniej jednak w przyszłości może wyodrębnić się sojusz iberyjski (hiszpańsko-portugalski) dążący do pewnego uniezależnienia swojej polityki od odmiennych geopolitycznie państw Unii Europejskiej.

Prezydencja włoska w G-20 zorganizowała w maju 2021 roku szczyt, który zakończył się deklaracją rzymską, w której podkreślono potrzebę wzmocnienia Agendy 2030 i znaczenie wielostronnej współpracy w celu zaspokojenia potrzeb finansowych krajów o niskich i średnich dochodach. Tymczasem na spotkaniu G-7 uzgodniono Deklarację Zatoki Carbis 12 czerwca 2021 roku, w której – oprócz wskazania na potrzebę odpowiedzi na problemy związane z pandemią – wezwano do lepszej koordynacji międzynarodowych instytucji finansowych. Również w Deklaracji Andora na XXVII Iberoamerykańskim Szczycie Szefów Państw i Rządów z 21 kwietnia 2021 roku ogłoszono wezwanie do wzmocnienia współpracy instytucji finansowych z mechanizmami oraz elastyczne traktowanie długu zewnętrznego (Ayuso, 2021). Kilka krajów afrykańskich odczuje pogorszenie sytuacji humanitarnej w 2022 roku. Szczególnie napięta jest sytuacja między rządem etiopskim a Ludowym Frontem Wyzwolenia Tichittu, który uniemożliwia dostęp do pomocy humanitarnej w kilku regionach północnej Etiopii. Oprócz tego napięcia „hydropolityczne” między Addis Abebą a Kairem o przepływ Nilu, chroniczna przemoc w Sudanie Południowym i części Somalii, niepewność sukcesji w Czadzie, kryzys przesiedleńczy w Demokratycznej Republice Kongo, rozszerzenie terroryzmu od Sahelu do północnego Mozambiku (Soler i Lecha, 2021).

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Cytowanie

Social Media and Political Participation among Youth in South-Eastern Nigeria: A Case Study of 2015 and 2019 General Elections

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Keywords: social media, south-eastern Nigeria, political participation, general elections

Abstract The study examines the role of social media and political participation among youth in south-eastern Nigeria during the 2015–2019 general elections. Both primary and secondary data were used. The instruments used for data collection were a validated questionnaire and guided interview. The data were analyzed using content analysis. Against this backdrop the Public Sphere and Political Campaign Theory was adopted as a framework of analysis. The findings of the study show that the social media have a very crucial role to play in the promotion of accountability in any democratic society. It was also discovered that for twenty years now, the democratic journey has remained tortuous because of the reckless pursuits of power by the political class. It was concluded that the Nigerian social media need to overcome some of the above mentioned challenges that limit their performance as a credible institution entrusted with the role of serving as the watchdog of the society without flouting the media ethical standards and squander imperatives for objectivity. The study recommends a need to address good governance that would position fundamental governance and create an enabling environment for self-participation. Electorates should critically analyze the situation and make inquiries before voting for a candidate who will not bring about growth and development in the country.

Introduction

In the 21st century, all forms of media and their tools are considered important factors that promote democracy and good governance. Through the media, the voice of the people, as well as their thoughts on political issues, is resonated. There is also an apparent synergy between the new media tools available today and the political life of people, and it typically sets the stage for a potent, interactive, and virulent version of political communication (Chinedu-Okeke, Obi, 2016).

"Information is power". This is a very popular, almost cliché statement. Access to information enables people to be aware of events, learn new ways of solving their problems, survey the environment, and get involved with happenings around them. Information also helps people make decisions about issues, based on the facts that are available to them. All these attest to the importance of information in the lives of people all over the world, and all through the ages. Access to information through the mass media has become a very intrinsic part of societies. The mass media is saddled with the responsibility of collating information, digging for facts, makings sense of events, and transmitting this information to a mass audience. Generally, this is done through either the print or electronic media or broadcast media (Olorunnisola, Douai, 2013; Momoh, 2019).

As digital media have become increasingly ubiquitous, there are increasing concerns over how, and to what social and political ends, youth engage with media Howell (2013), notes that there is particular interest in understanding how participation in mediated environments online fosters civic engagement, knowledge, and civic participation. This work attempts to investigate the trends concerning participation in digital environments, in order to consider the implications for youths to practice citizenship through internet and social media literacy, and how participation in media spaces is negotiated by youth in relation to political practices and its subsequent consequences (Abdulyakeen, 2021).

The use of social media in politics has continued to grow in Nigeria in recent time. Traditional media have been in the vanguard of political communication, mediating even the interpersonal model. With increasing knowledge of the computer and the internet and invention of many devices in Information Communication Technology (ICT), politicians as well as the electorate embrace the use of blogs, websites and other social media platforms for communicating political issues. There is an increase in the use of the internet in Nigeria.

According to the National Information Technology Development Agency (NITDA, 2015), Nigeria has a population of 178,516,904. The population change is put at the rate of 2.8%. The internet penetration (% of population with access to the internet) of 37.59% has been ranked 8 in the world as of July 2014. The internet users have meteorically risen to 67,101,452, with user growth at 16% and growth of new users placed at 9,365,590, out of the 210,948,420 internet users in Africa per International Telecommunication Union (ITU). The leading global networking site Facebook has 14 million users in Nigeria as of 15 January 2015 out of 35,930,391 users in Africa which means 2.0% penetration rate of Nigerian population. Twitter boasts of 1.8 million users in Nigeria, while YouTube has 800,000 Nigerian accounts (Antoci, Sabatini, Sodini, 2012; Grow Ward, 2013; Kreiss, 2014). The social media is not only empowering people but it is also democratizing human relations. Necessity of social interactions, determined by the requirements of a mixed economy and rapid migration to capitalist economic order has enhanced patronage of the social media by individuals, governments, and corporate organizations. The use of the internet by politicians to communicate with their constituencies has further extended the concept of "mediatization" of politics in Nigeria (Ajayi, Adesote, 2015).

Before the advent of the new media, political campaigns and other electioneering activities blossomed in the traditional media. But the arrival of new media, and lately social interactive

media, has greatly affected the way the game of politics is played, and many democracies across the globe are also affected. Since 2008, when Barrack Obama broke new ground by using social media in his political campaigns in ways never seen before, many politicians have toed along this line. In Africa, Goodluck Jonathan of Nigeria quickly comes to mind and Muhammadu Buhari. Jonathan on Wednesday 15 September 2010 took the extraordinary step of announcing his bid for the highest political office in the land on Facebook. He informed his 217,000 fans on the world's most popular networking platform of his intent: twenty four hours later, 4,000 more fans joined his page. By the day of the election, on 16 April 2011, he had over half a million followers (Odoemelan, 2011; Adeyanju and Haruna, 2012). Same goes for Buhari and Osinbajo of the APC during the just concluded general elections where the social media became a political coliseum for them and their competing opponent and incumbent, the PDP. In addition to the approximately 14 million registered Nigerians on Facebook and 1.8 Million on Twitter, almost every institution involved in Nigeria's 2015 general elections conducted an aggressive social networking outreach, including the Independent National Electoral Commission (INEC). Political parties, candidates, media houses, civil society groups, and even the police.

Olorunnisola and Douai (2013) observed that during the elections in Nigeria, many Nigerians were armed with their blackberries and Twitter feeds. They explained that a 33 year old IT consultant and activist Gbenga was one of such Nigerians. His team had designed a smart phone application called Revoda which allowed voters to instantly upload reports of delayed voting materials and intimidating gangs at their local polling stations to their database; a daily summary was then sent to Nigerian election officials and Western observers as well as posted on their Revoda website. This allowed many people within and outside Nigeria to follow the process. Photos, pictures, details and videos from polling stations were quickly uploaded to Facebook and YouTube.

The research is important because there is a consistent demand for the detachment of youth from social media servitude, and inclusion in governance as measured by improved social service delivery and accountability from government officials The elected officials will continue to get away with not serving the people campaigned and sworn an oath to serve, while federal (national) and state level issues affect all citizens.

Sumera, Zaeem and Batool (2020), reiterated that it has become very common to participate in online political activities through liking, mentioning, tagging, uploading, commenting, and sharing political content as well as following politicians on Facebook and Twitter. Similarly, in the words of Jha and Kodila-Tedika (2019), social media sites not only empower the general citizens but also politicians.

South-eastern Nigeria was created as 22 states during the civil war of 1967–1970 but the region was changed to one of the six geopolitical zones in the country by the 1990s. Presently, the region consists of five states: Abia, Anambra, Ebonyi, Enugu, and Imo. The southeastern geopolitical zone includes 99.9% of population of Igbo people. This zone was home of many groups such as Igbo, Ijaw, Ibibo, and Efik. These groups live in peace with democratic system of government in several kingdoms. The zone has 85 local government areas with a population of over 20 million. The zone has about 10 commercial cities, apart from agriculture as the major economic activities. The zone is

also known as commercial and trading zone with small and medium indigenous industries that are manufacturing goods and services. The main Agriculture products in the zone are yam, cassava, rice, cocoyam, etc. The zone has solid minerals and nature resources such as crude oil, natural gas, bauxite, iron ore, sandstone, lignite, clay, coal, tin, and columbite (Sule, Sani, Mat, 2017). The zone has recently been plagued by crisis as a result of the call for secession and the creation of the State of the Independent people of Biafra (IPOB) by the leader of the movement in person of Nnamdi Kanu. He has recently declared that he doesn't represent the voice of the Igbo nation as well as is lacking capacity to do so. The (IPOB) has recently introduced the sit-at-home order in the zone to press home their demand as well as a gesture of solidarity with their leader Nnamdi Kanu who has been detained by the Nigerian Government. Nowadays, in south-eastern Nigeria social media is providing a new dimension for political leaders to communicate and engage with their citizens. However, the misuse of social media to spread fake news, hate and violent extremism portend grave dangers to the region. Evidentially, extremism, hate speech and fake news have contributed to several societal unrests. Several scholars (Gottfried, 2016) agree that hate speech and fake news play significant role in major outbursts of violence in the society. Gagliardore, Gal, Alves, Martinez (2015) note that a hate speech in itself is wrong and should not be supported by anybody.

Statement of the research problem

There has been a notable rise in online and offline violent extremism all over the world, Nigeria inclusive (Kreiss, 2014; Ahmed, Lodhi, Shahzad, 2011). The advent of social media platforms such as Facebook, Twitter, WhatsApp, Instagram, etc. have given rise to new problems as it concerns online hate comments (Gagliardone, Gal, Alves, Martinez, 2015; Silva, 2016). Several human rights groups and activists have expressed displeasure over the continuous use of the social media platforms to spread all kinds of discrimination (Anti-Defamation League, 2015; Simon Wiesenthal Center, 2012). Bartlett and Reynolds (2015) maintain that social media platforms have become a useful tool for violent extremists to advance their goals. They use the media to influence the youths with extremist messages aimed at propagating their negative ideology and recruitment (van Ginkel, 2015). Gerstenfeld, Grant and Chiang (2003) observe that the people propagating extremism use the social media. Evidence shows that excessive cases of online hate speeches happen on social media (Hawdon, Oksanen, Räsänen, 2014; Mondal, Silva, Benevenuto, 2017).

The usefulness of social media cannot be overemphasized. Social networking has become a very important tool for political mobilization globally. It is gradually becoming a dependable tool in changing the opinions and influences the public. Realizing the efficacy of this medium, some Nigerian politicians quickly embraced it and exploited it extensively for their political campaigns in the 2015 and 2019 general elections. The media are essential social forces that lubricate the engine of democracy. Nevertheless, social media is sometimes used inappropriately, thus, diminishing the positive part it would have played in enhancing unbiased and fair political campaigns. These actions affect the credibility of the media, as well as the politicians who utilize it for misinformation within the society. Buttressing on this, Oyenuga (2015) observes that in the 2015 general elections, webbased social networking turned out to be all the more intense device and

even a deadlier weapon in which various video releases, voice lines, feature reports, headlines, and broadcasts were made to mar many political parties and individuals. For a long time, due to many factors, including the "hegemonic" nature of communication in Nigeria, youths had little opportunity to be active in governance, or make their views heard. However, with improvement in communication technology, the status quo appears to be changed. The internet tools like the social media have revolutionized the way people communicate.

In southeastern Nigeria, youths, who have higher levels of affinity with the social media, are using it to achieve different ends. It holds lots of potential for news, information, entertainment, mobilization, interaction, and expression. Given these potentials, it is pertinent to find out how the social media impacts the issue of governance and political participation by youths in 2015 and 2019 general elections. Some studies have been carried out, mostly focusing on events such as protests. It is, however, pertinent to examine how the leadership and the political atmosphere have been changed, with relation to the role of social media in 2015 and 2019 general elections. This forms the crux of the study.

Research objective

Having juxtaposed the statement of the research problem, the following research objectives were drawn:

1. To assess the efficiency of social media platforms and political participation in south-eastern Nigeria during the 2015–2019 general elections.
2. To examine the roles of social media platforms and political participation in south-eastern Nigeria during the 2015–2019 general elections.
3. To enumerate challenges affecting the usage of social media platforms and political participation in south-eastern Nigeria during the 2015–2019 general elections.
4. To suggest ways of improving social media platforms and political participation in south-eastern Nigeria during the 2015–2019 general elections.

The concept of social media

Kaplan and Haenlein (2010) defined social media as the "internet based applications that allow the creation and exchange of content which is user generated" (p. 61). They stated that social media was first known in 1979, when Tom Truscott and Jim Ellis from Duke University created the Usenet, a worldwide discussion system that allowed internet users to post public messages; and also when Bruce and Susan Abelson founded "Open Diary" in 1998. Open Diary was an early social networking site in which members of a certain community shared their daily diary online and the word "blog" was first used at the same time. Before the second stage of development of the internet, "Web 2.0," in the late 1990's, users browsed only for the aim of getting information through reading from various resources and watching videos (Kaplan, Haenlein, 2010; Adeyinka, 2016).

According to Al-Deen and Hendricks (2012) users at that time were considered consumers, not participants. Adeyinka (2016) mentioned Web 2.0, representing the second stage of the internet

development, namely "User Generated Content (UGC)". The internet users were transformed from being consumers and participants to "prosumers" which means that they consume and produce media. These new affordances are what made the applications and dynamic interaction of social networking possible. Some of the common features that qualify a tool to be considered a social networking site are: enabling users to communicate with each other in an easy way and allowing users to exchange information, pictures and messages Al-Deen and Hendricks (2012). There are many forms of social media, presented in the Table 3 below, which allow users to interact with other media users of their choice.

Political participation

Political participation is the activity by individuals or groups intended to influence those who govern or how they should do so. As a state matures through political freedom and economic upliftment, political consciousness is bound to grow. This is the cause and the effect of political participation. Political participation, as one of the threats of democracy, is found to be liberal and unrestrictive. Subscribing to this, Apam (2010) perceives political participation as "freedom of expression, association, right to free flow of communication, right to influence decision process and the right to social justice, health services, better working condition and opportunity for franchise". Political participation is one of the key ingredients of democracy in its real sense. Taking the conceptualization of democracy by Diamond (1996) into cognizance, democracy provides the equal opportunity platform for political participation and fairness in such competition, i.e. a system of government that meets three essential conditions: meaningful and extensive competition among individuals and groups, especially political parties, for all effective positions of government power, at regular intervals and excluding the use of force; a highly inclusive level of political participation in the selection of a leader and policies, at least through regular and fair election, such that no major (adult) social group is excluded; and a level of civil and political liberties, freedom to form and join organizations sufficient to ensure the integrity of political competition and participation. In a similar perspective, Wilson (2000) conceptualizes four indicative domains of democracy which include: "the domain of individual and group rights and freedoms; the domain of popular and equal participation in collective decision; the domain of accountability of government to mass public and constituent minorities; and the domain of the application of the principles of equal citizenship in all spheres of life: social, economic, and political.

The running theme of these definitions is that any claim to democratic regime or state must essentially embrace a high degree of competitive choice, openness, enjoyment of civil and political liberties and popular participation that embraces all groups of the society, i.e. one that is not segregationist or discriminatory. The conceptual underpinnings of the definitions are freedom and equal opportunity for political participation that democracy avails both men and women. If democracy does not ordinarily discriminate on the grounds of race, religion or sex, then restrictions experienced in Africa and Nigeria suggests a level of artificiality and manmade imposition.

Youth

The term 'youth' is vague. Hence, there is no generally agreed definition for it. The definition of youth varies from country to country, culture to culture, and from continent to continent based on the situations involved. The differences in the concept of youth have critical implications for planning, research, policy, and interventions (Borges, 2020). As it was stated by Apam (2010), "youth is defined in the literature as both an age group and social construct". The United Nations (1992) defined youth as persons aged 15–24 years. The UN definition of youth is followed by the United Nations International Children's Emergency Fund (UNICEF) and the World Health Organization (WHO) Apam (2010). However, they consider young people and adolescents as those aged 10–24 years and 10–19 years, respectively. In the view of the United Nations Youth Fund, they include the persons between 15 and 32 years of age (United Nations, 2011).

The United Nations Educational Scientific and Cultural Organization (UNESCO, 2010) define youth as a time of evolution from the dependence of childhood to the independence of adulthood. Besides, youth is defined as those individuals between 15 and 35 years of age Van-Morgan and Morgan (2010). This definition is in line with the meaning of youth endorsed by the African Union (AU) (Altschuler, Strangler, Berkley, Burton, 2009). As was observed by the Van-Morgan and Morgan (2010), this definition was adopted by AU in the realization of the shortcomings associated with UN age division (Ashiru, 2010; Xenos, Vromen, and Loader, 2014). The argument is that based on the social, political, economic, and cultural context, the evolution from childhood to maturity and the process of defining a youth can occur at various ages, and over various times. In the understanding of Apam (2010), the extension of those considered as a youth to 30 years and beyond in Africa is an indication of the evolving phenomenon of a protracted time for the dependence of youth. The age range 15–24 years is utilized by the United Nations and others for statistics purposes. However, for Nigeria, considering numerous circumstances, this classification is too restricted.

The National Bureau of Statistics (NBS) adheres to the international standard of 15–24 years in terms of the age range. Each country determines the definition of youth based on a national situation. Alongside GuineaBissau, Madagascar, Senegal, and Togo, the persons aged 18 and 35 years are regarded as youth in Nigeria. This definition is in line with the political, historical, and current socio-economic happenings in the country. However, for the National Youth Service Corps (NYSC), the upper age range for young people is thirty years.

Role of social media in elections and political participation in Nigeria

Asad (2014) asserts that social media have great potential for encouraging collaborative political participation. Accessible social media platforms offer ordinary citizens the opportunity to interact more directly and actively with their political systems. Social media tools also possess the potential to allow diaspora communities to get involved in social-political processes. People engage in social media for various reasons which include airing their views and expressing (in some cases) anger and dissatisfaction. Mobilizing citizens to become engaged in politics is more than getting people out to vote at a poll on the Election Day.

Various Nigerian political actors and aspirants who are engaged in electoral processes are increasingly using social media platforms such as Facebook, Twitter, Instagram, YouTube, and blogs in their campaigns. Political parties and independent political advocacy and interest groups have recently used Facebook, Twitter, and political blogs as mediating platforms to engage citizens. Similarly, citizens have employed social media to participate in the electoral process. There are some pertinent examples of social media being widely used across Nigeria, most especially in the Fourth Republic, to encourage citizens' political involvement. It is widely known that running an election campaigns through social media platforms is a tactic that has been successfully employed in developed countries.

For example, the former US President Barrack Obama ran a widely popular election campaign in 2008 that employed social media to good effect. In the US, the 2008 election of Barrack Obama as President reflected unprecedented use of social media in a political campaign. The Obama campaign served as a stunning demonstration of a skilled team's use of widely available tools. The Obama campaign participated actively in more than 15 social networks and had 5 million active supporters through these media (Aleyomi, Ajakaiye, 2014; Williams, Gulati, 2013).

Likewise, the US President Donald Trump is a popular and daily user of Twitter to communicate to his political base and American audience. Also, President Goodluck Jonathan of Nigeria successfully utilized Facebook and Bulk SMS to interact with Nigerian citizens during the 2011 presidential elections. Jonathan even took the unprecedented decision of announcing his presidential candidacy on Facebook. The bid was announced on 15 September 2010 to his 217 000-plus fans through his Facebook page. By the Election Day on 16 April 2011, Jonathan had over half a million fans on Facebook (Aleyomi, Ajakaiye, 2014; Auger, 2013).

In Nigeria's electoral process, social media tools were not only employed for political campaigns but also various institutions involved in the elections conducted their own social media initiatives. Institutions such as the Independent National Electoral Commission (INEC), political parties like the People's Democratic Party (PDP), All Progressive Congress (APC), and others, candidates, media houses and civil society groups engaged with citizens on various social media platforms. During the month-long election process in April 2011, INEC posted almost 4000 tweets, many in response to voters' queries; a report on the role played by social media platforms during the electoral process revealed that Twitter ultimately proved to be the most efficient way to interact with INEC (Aleyomi, Ajakaiye, 2014; Momoh, 2019). Similarly, during the election, the Nigerian mainstream media struck a relationship with social media platforms that enhanced both citizens' participation and professional journalistic practices. Journalists from various media organizations interacted with citizens on Facebook and the citizens' contributions informed the journalists' questions during interviews and debates with aspirants and institutions such as INEC.

Okoro and Nwafor (2013) also agrees that the use of social media during the 2011 elections enhanced transparency in the electoral process and made INEC more accountable to the public in the conduct of elections. The importance of the above medium for citizens' political mobilization and participation notwithstanding, the current political climate all over the world has witnessed a shift in attention to the social media. For instance, the recently concluded 2019 general elections

witnessed a remarkable use of social media as a political communication tool in Nigeria. Indeed, several aspirants, especially at the presidential level, engaged robustly on social media campaigns. Three major issues underline the tremendous use of social media tools during the 2019 general elections.

Firstly, it reflects a global trend towards "internet elections" or "e-electioneering". Around the world, rapidly expanding access to the internet increased availability of internet ready smart-phones and other communication devices, as well as the evolution of web-based new media – personal websites, social networking sites, blogs, newsletters, have redefined methods of political communication, leading to a significant shift towards the use of social media in the electoral process. Previously, network television and newspapers dominated coverage of electioneering and were the primary sites of election-related information. But today, the social media has become a major election information sharing platform globally. Because of its ease of use, speed, and reach, social media is revolutionizing the efficiency of election administration, coverage and reporting (Chandrappa, 2012)

The second issue that underlines the use of social media in Nigeria's 2019 elections is the tendency of some Nigerian politicians to tap the opportunities offered by the social media for online campaigning. During the 2019 general elections, many politicians, particularly the presidential aspirants, used social media tools to connect with the voters and constituents. Facebook and Twitter appear to be the most widely used social media platforms by the politicians. Presidential aspirants like Atiku Abubakar, Tony Moghalu, Oby Ezekwesili, Sola Sowore, among others, all had Twitter and other social media accounts. Political parties also maintained Facebook accounts. Social media offered politicians and their parties the opportunity to broadcast messages and recruit a huge number of volunteers to support their campaigns.

The third issue that underscores the use of social media in Nigeria's 2019 general elections was the tendency of the Nigerian civil society and the electorate to take up social media as a tool for improving the efficiency of election observation. Prior to the conduct of the 2019 elections, elections in Nigeria had been largely flawed by vote rigging and other electoral malpractices. The 2019 general elections offered a unique context and opportunity to examine the use of social media in elections, especially the usefulness and applicability of social media in the electoral environment. Although it seems obvious that social media contributed in no small measure to the success of the 2019 elections, it is pertinent to understand specifically how particular stakeholders in the 2019 elections, like INEC, politicians/political parties, the electorate, and Civil Society Organizations (CSOs) used the social media during the elections and the impacts these had on the elections (Adamu, Abubakar, 2020).

In recognition of the ever increasing role of the social media in the elections, many world leaders now communicate and update their citizens via Twitter, Facebook, and others platforms. In fact, as mentioned earlier, Donald Trump, the former President of the United States of America, constantly "tweeted" and "retweeted" on Tweeter and he is even regarded as "being too social media savvy". In Nigeria, President Mohammadu Buhari, though not a social media savvy president recognizes the influence and impact of social media. Consequently, he appointed Lauretta Onochie and Bashir Ahmad to manage his social and new media platforms (Adamu, Abubakar, 2020).

Role of social media in political awareness

In a modern democracy, social media can be used by governments to involve citizens in decision making, and by civil society to engage people in specific issues. However, social media can also be used to broaden political participation by helping citizens to communicate with their representatives and with each other Kocak, Kaya and Erol (2013). The use of social media as a formidable force for social engineering and political electioneering has continued to grow. The technology is participatory, interactive and cost-effective. This has made it the medium of the moment as far as political communication and participation are concerned.

The role of youth in electoral activities cannot be overemphasized. They play active role in mobilizing support for candidates and actual voting. They are the active participants of election violence and also the active users of social media. Disseminating useful information to youth in form of voter education is a means of forestalling incidences of election violence and electoral manipulations. Data released by statista.com indicated that there are 84.3 million internet users in Nigeria and that by 2019, there would be 93 million internet users. Chukwuemeka Afigbe, Manager Developer programme at Facebook, revealed that about 26 million Nigerians now login on Facebook every month. Social media is indeed the best avenue for reaching out to majority of the voters.

Empirical review

Lawal and Muhammed's (2018) work entitled "The role of mass media in political socialization which focus on the 2015 general election in Nigeria" demonstrated that the mass media has done a lot in its role as a watchdog and public opinion shaper. The study, however, unraveled that ethnicity, ownership structure, sensationalism, and corruption are some of the fundamental factors that have compromised the efficiency of the media in fostering effective political socialization in Nigeria. In view of this, the study recommends that the media in Nigeria must assist in building and maintaining an environment conducive for effective political socialization in the country. However, Lawal and Muhammed (2018) did not examine the influence of mass media on electioneering campaign in the 2019 governorship elections in Lokoja, Kogi state.

Udeze and Akpan (2013) in their study of the influence of political advertising on the choice of governorship candidates in Imo State during the 2011 governorship election, revealed that majority of the electorate in the State were exposed to political advertising, mainly on radio which to a large extent influenced the choice of candidates during the governorship election. However, the above studies do not examine the influence of mass media on electioneering campaign in the 2019 governorship election in Lokoja, Kogi state.

In another related research conducted by Auger (2013) critically investigated fostering democracy through social media and evaluated the usage of Twitter, Facebook and You Tube among the nonprofit advocacy organizations and they were ethically motivated people to their point of view. The study also found that Facebook, Twitter and You Tube were facilitated organizations for different purposes in two-way communication. Unfortunately Auger, accentuate the gap and impact for which the youth on social can make for their communities.

Moreover, Abbott (2014) investigated the ICTs impact on social as well as politically generated issues and the role of social media in East Asia. Both researchers were interested to observe the internal political impact and new digital usage in political discussion. Study findings reveal that the internet itself doesn't support democratization process it does limit the authoritarian regimes, but now technology some extend empowers the citizens for political mobilization than ever before. This is partially in agreement to the point raised. However, the two studies above were inadequate to identify youth awareness, engagement and contribution on civic governance and public accountability through social media.

Sule, Sani and Mat (2017) in their study examined the extent to which the 2015 Presidential Election differs from the previous Presidential Elections in Nigeria. The study revealed that the 2015 Presidential Election was different to some extent with the previous Presidential Polls in Nigeria in term of voters' influence. The influence was attributed to factors such as: religious affiliation, ethnicity, regionalism, nepotism, issue-based politics including corruption, insecurity, poverty, unemployment, among others which influenced political behavior of the electorate. However, the study does not examine the influence of mass media on electioneering campaign in the 2019 governorship election in Lokoja, Kogi state.

Kachii (2018) assessed the impact of political advertising on voting behavior of electorate in Benue State. The study was conducted to unravel the influence of politically motivated campaign songs during the 2015 elections on electorate in Benue State. The study revealed that campaign songs only created the political atmosphere and promoted political candidates, but did not guarantee electoral victory. Moses (2019) in his study of Electoral violence and its implication on Nigeria's democracy in Bayelsa state unraveled that the election was characterized by violent activities which no doubt flawed the electoral process. In fact, the election was marred with all sort of sharp practices such as intimidation, vote buying, rigging and destruction of both sensitive and non-sensitive materials and so on. As a result of this, the research recommended among others that there should be massive re-orientation of the electorates and politicians on the need to accept defeat and embrace dialogue in any electoral contest. Nevertheless, the above studies do not examine the influence of mass media on electioneering campaign in the 2019 governorship election in Lokoja, Kogi state.

Lawal and Momoh (2019) in a study entitled "Vote buying and electoral integrity in the 2018 gubernatorial election in Ekiti State" identified key implications of vote buying on the conduct of credible elections in future elections in Ekiti State such that present situation has provided poor voters the opportunities to see election as a period when their vote can be sold to the highest bidder. On the whole, the implication of vote buying on Nigeria's electoral processes has resulted to various degrees of irregularities that have questioned the level of electoral integrity in the country. The researchers therefore recommended that there is need to strengthen the existing legal framework to guide against vote buying such as the electoral Act 2010 (as amended 2015) in order to address some of the notable inconsistencies and potential loopholes in the Electoral Act. Despite, the contributions of Lawal and Momoh's study, it does not examine the influence of social media and political participation in 2015 and 2019 general elections in south-eastern Nigeria. It is against this background; this study seeks to make contributions to this research area.

Research methodology

This paper adopts a mixed method of research design which entails collection of both quantitative and qualitative data. The population of the study consists of respondents in south-eastern Nigeria which is made up of five states, namely: Anambra, Abia, Ebonyi, Enugu, and Imo states. The total population, according to National Bureau of Statistics (2017), of these states is 21,955,400. The sample size of 380 at 95% confidence level was used based on the Wimmer and Dominick online sample size calculator. The multi-stage and purposive sampling techniques were deployed to select respondents who have social media account(s) from one of the Local Government Areas located each of the five state capitals. In Awka, Anamabra state, Awka North LGA was selected, Abia – Umuahia (Umuahia South LGA was selected), Ebonyi – Abakiliki (Abakiliki LGA was selected), Enugu – Enugu (Enugu North LGA was selected) and Imo – Owerri (Owerri Municipal LGA was selected) respectively. Meanwhile, one key informant was purposively selected per state making a total of five participants for the key informant interviews to complement quantitative survey. The reason for the small number of participants is due to the fact that in qualitative research method the number is usually small, as Khan, Anker and Patel (2016) observe that qualitative study usually involves small participants in an in-depth discussion in which small number of people from the target population deliberate on issues that are of relevance to the study. The instruments for data collection were questionnaire and interview guide. The questionnaire comprised of Likert scale questions. The results of the distributed questionnaire were presented in tables using simple frequency, percentage and mean analysis.

Data presentation and analysis

As shown in Table 1 above, 28.68% of the respondents are between 18–25 years of age, 27.12% are between 26–32 years, 39.74% are aged between 33–39 years, 40–46 years are 3.16%, 47–53 years are 0.79%, and the remaining 0.53% are 54–60 years and above. This shows that the majority of the respondents are between the ages of 33 and 39 years. From this Table it can be concluded that the research received response from all the adult categories in the study area. The sex distribution of the respondents, on the other hand, indicates that out of the 380 respondents, 366, representing 96.3%, were males while 14, representing 3.68%, were females. This, therefore, implies that majority of respondents are males, however, the views of females were not left out. The Table 1 also indicates that 366 of the respondents, representing 96.3%, were affiliated to Christian religion, while 14 of them, representing 3.68%, were said to be affiliated to Islamic religion. None of the respondents claimed affiliation to traditional religion. This indicates that Christianity is the dominant religion in the study area. With respect to occupation, the Table shows that 23.4% are civil servants, 18.68% are engaged in various types of business, 7.89% are farmers, 18.9% are teachers at various levels, 24.5% are students, while 18.68% are into different occupations such as artisans, mechanics, tailors, drivers, barbers, etc. The majority of respondents therefore are businesspersons.

Table 1. Respondents' bio-data

List	Frequency	Percentage
Age		
18–25 years	109	28.68
26–32 years	103	27.12
33–39 years	151	39.74
40–46 years	12	3.16
47–53 years	3	0.79
54–60 years	2	0.53
Total	380	100.00
Gender		
Male	198	52.11
Female	182	47.89
Total	380	100.00
Religious Affiliation		
Christianity	366	96.3
Islam	14	3.68
Traditional Religion	0	0.00
Total	380	100.00
Occupation		
Business	71	18.68
Farming	30	7.89
Teaching	72	18.9
Students	93	24.5
Civil Service	89	23.4
Others	25	6.57
Total	380	100.00

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 2. Use of social media

Option	Frequency	Percentage
Yes	352	92.6
No	28	7.4
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 2 shows that 352 (92.6%) use social media for its influence one's way of life, one's thinking as regards the public accountability and democratic process, 28 (7.4%) answered in the negative. This implies that significant proportion of the respondents use social media platforms.

Table 3. Forms of social media

Social media	Frequency	Percentage
Facebook	281	73.9
WhatsApp	13	3.4
Instagram	10	2.6
Twitter	73	19.2
Others	3	0.8
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 3 above shows that 281 (73.9%) of the respondents opted for Facebook as the form of social media they are familiar with, 13 (3.4%) choose WhatsApp, another 10 (2.6%) went for Instagram, 73 (19.2) went for Twitter, another 3 (0.8) choose "Other" option. This implies that majority of the people who participated in this research are familiar with the use of social media.

Table 4. Roles of social media during electioneering campaign

Roles	Frequency	Percentage
Provision of information events	49	12.9
Provision of comments including guidance and advice in relation to events	61	16.1
Provision of a forum for access channels for diverse views and for political advocacy	79	20.8
Provision of a two-way channel between citizens and government	82	21.6
Acting as critic or watchdog in order to hold the government to account	109	28.7
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 4 show the collective rank order of the social media roles, according to how important the respondents see each of them. It can be observed that 109 respondents, representing 28.7%, ranked acting as critic or watchdog in order to hold the government to account as the most important mass media role, followed by 82 representing 21.6% choosing providing a two-way channel between citizens and government, providing access channels for diverse views and for political advocacy was 79 representing 20.8%,andprovision of comments including guidance and advice in relation to events ranked 4 representing 61 (16.1) and provision of information about events ranked 5 representing with 49 (12.9%).

Table 5. Social media influence efficiency of 2015–2019 general elections

Option	Frequency	Percentage
Yes	292	76.8
No	79	20.8
I don't know	9	2.4
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 5 shows that 292 (76.8%) of the respondents believe that social media influence efficiency of 2019 general elections. 79 participants (20.8%) answered in the negative and the rest 9 (2.4%) went for the "I don't know" option. This revealed that social media has influenced the efficiency of the 2019 general elections.

Table 6. Stage of using social media

Variable	Frequency	Percentage
Campaign	222	58.4
Voting coverage	9	2.4
Distribution of election material coverage	39	10.3
Counting of voter's coverage	110	28.9
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 6 shows that 222 (58.4%) of the respondents uses social media for campaign, 110 (28.9%) uses social media for counting of voter's coverage 39 (10.3%) for distribution of election material coverage, while 9 (2.4) uses social media for voting coverage. This result shows that majority of the respondents used social media during campaign.

Table 7. Motive for using social media

Motives	Frequency	Percentage
My political party	125	32.9
Political candidate	195	51.3
N.G.O.	11	2.9
Freewill	49	12.9
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 7 shows that 125 (32.9%) of the respondents uses social media for political party activities, 195 (51.3%) uses it for promoting their political candidate, 49 (12.9) uses it for free will, 11 (2.9) uses it's for N.G.O. This shows that significant population use social media to promote their candidate during the 2015–2019 general election.

Table 8. Social media used during the 2015–2019 general elections

Social media	Frequency	Percentage
Facebook	281	73.9
WhatsApp	13	3.4
Instagram	10	2.6
Twitter	73	19.2
Others	3	0.8
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 8 above shows that 281 (73.9%) of the respondents opted for Facebook as the form of social media used during the 2015–2019 general elections, 13 (3.4%) choose WhatsApp, another 10 (2.6%) went for Instagram, 73 (19.2) went for Twitter, another 3 (0.8) choose "Other" option. This implies that majority of the people who participated in this research opted for Facebook as the form of social media used during the 2015–2019 general elections.

Table 9. Electronic device used during the 2015–2019 general elections

Electronic device	Frequency	Percentage
Android phone	281	73.9
IPhone	51	13.4
Palm tablet	39	10.3
Computer	9	2.4
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 9 shows that 281 (73.9%) of the respondents use Android Phone, 51 (13.4%) use IPhone 39 (10.3%) use Palm Tablet while 9 (2.4) uses computer. This shows that Android Phone was the most used electronic Device used during the 2015–2019 elections.

Table 10. Social media influence efficiency of 2015–2019 general elections

Option	Frequency	Percentage
Yes	366	96.3
No	10	2.6
I don't know	4	1.1
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 10 shows that 366 (96.3.%) of the respondents believe that social media influence efficiency of 2015–2019 general elections, 10 (2.6%) answered in the negative and the rest 4 (1.1%) went for the "I don't know" option. This shows that majority of the respondents were of the opinion that social media influenced the efficiency of the elections.

Table 11. Rating the role of social media in the democratic processes

Option	Frequency	Percentage
High	194	51.1
Very high	9	2.4
Low	90	23.7
Very Low	84	22.1
I don't know	3	0.8
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

In response to the question on the impact of social media in the Democratic Press in Nigeria's Fourth Republic, 194 (51.1%) of the respondents said that it was high, 9 (2.4%) said very high and 90 (23.7%) of the respondents said it was low. Also, 84 (22.1%) of them said it was very low and the rest of the respondents who rated social media in the Democratic Press as high is 51.1% and that of those who rated it as low stands at 23.7%. Thus, majority believed that the impact of social media in the Democratic Press in Nigeria's Fourth Republic is high.

Table 12. Level of preparedness of social media

Option	Frequency	Percentage
Yes	366	82.5
No	10	12.5
I don't know	4	5.0
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

It could be observed from the Table 12 that the social media in Nigeria are well equipped to carry out their functions effectively. 10 (12.5%) participants answered in the negative and 4 respondents (5%) went for the "I don't know" option. This implies that social media platforms are capable of transforming election.

Table 13. Social media has an effective role to play in a democratic process

Opinion	Frequency	Percentage
Strongly agree	222	58.4
Agree	131	34.5
Strongly disagree	10	2.6
Disagree	17	4.5
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

Table 13 shows that 222 (58.4%) of the respondents strongly agreed that the social media has an effective role to play in Nigeria's democracy, 131 (34.5%) agreed to this, 10 (2.6%) strongly disagreed and 17 (4.5%) of the respondents disagreed. Majority of the respondents opined that social media have an effective role to play.

Table 14. Social media can contribute to the credibility of election

Option	Frequency	Percentage
Yes	292	76.8
No	83	21.9
I don't know	5	1.3
Total	380	100.0

Source: Abdulyakeen, Yusuf (2021), field survey.

From the above Table we can conclude that 292 (76.8%) confirmed that social media can contribute to the credibility of election, 83 (21.9%) said no, and 5 (1.3%) did not have an opinion on this matter.

Summary of an in-depth interview (qualitative data)

Codes were ascribed to the participants from the five south-eastern states Anambra (ANA1), Enugu (ENU2), Imo (IM3), Abia (ABI4), and Ebonyi (EBO5). Questions were asked to further help answer the research questions posed in the study.

The first question was: What is the extent of usage of social media platforms in political participation among youth in south-eastern Nigeria during the 2015–2019 general elections? Responding to this question, ANA1 said: "To the best of my knowledge I think social media have not been well deployed in combating extremism, hate speech and fake news because if you go out there you will notice this issue is still prevalent in the cyberspace". EBO5, in a similar vein, noted that: "No doubt, efforts are being made to combat this problem but I think it should be intensified because if it is not checked there is going to be a big problem". ENU2 answered: "It is being used but the extent is at moderate level and at moderate level I don't think much can be achieved". In the opinion of IM3 social media platforms are well utilized to a large extent in combating the menace of extremism, hate speech, and fake news through the help of government agents of change". ABI4 said: "No, no, no! Social media has not been used to large extent. If it has been used, then the issue of hate speech and fake news should be dying by now. Now look at the society every now and then – sections against sections in a verbal war. Does that show it is being used? Well, I think you know the answer." The majority of comments from participants revealed that social media platforms have not been used to a large extent in combating extremism, hate speech, and fake news during the 2015 and 2019 general election.

The next question was: How effective are social media platforms in political participation among youth in south-eastern Nigeria during the 2015–2019 general elections?

Responding to this question EBO5 noted: "Social media platforms, to the best of my knowledge, have never been effective political sensitization in Nigeria. When you go on Twitter or Facebook you will see what I am telling you. If you see the hate in people through their comments you will marveled". ANA1 words were in consonance with those of EBO5's: "Truly, I must say social media platforms have even fuelled the heat on hate speech, fake news and extremism because of the presence of no censorship. Anyone can just come and post anything, portraying hate or even post misleading information". ENU2 said: "How effective? I think social media platforms have not been so effective because every day we wake up and see hate speech, fake news. Gentleman, I mean it when I say it is not effective in combating fake news, hate speech, and extremism: ABI4 explained: "In my own opinion I don't think it has been effective because social media platforms are like a market with dirt where anyone can come and dump garbage and leave". IM3: "Even though I am of the opinion that social media platforms are used to a large extent to combat fake news, hate speech or extremism, I don't think it is that effective because this issue keeps reverberating despite calls from government and other institutions to shun hate speech, fake news spread and all that". From all the responses it follows that social media platforms are not seen as effective in combating extremism, hate speech, and fake news.

Concerning the question on challenges ENU2 opined: "The absence of law regulating these platforms will definitely pose a big problem. Not only that, the free access to these platforms gives people the leverage to use the medium to do whatever they like, such as posting misleading information." In similar vein, IM3 maintained: "When the people are not happy as a result of government attitudes towards certain issues of national importance, people who are aggrieved will use the quickest way – in most cases the social media – to express their displeasure and in such

situation how can the social media be of help in curtailing hate speech or extremism?" ANA1 and ABI4 shared similar view: "The free access to social media by just anyone can serve as a stumbling block in using the platform in combating hate speech, fake news, and extremism". EBO5 pointed towards government policies and law on some issues: "Truly, I must say that when governments are not doing things right, people will react and in recent times the social media is the first point where they go to vent their anger". From these comments it is obvious that there are numbers of challenges that affect the usage of social media platforms in political participation among youth in south-eastern Nigeria.

Discussions of the major findings

Findings from the data analysis revealed that the social media platforms were used in political sensitization during the 2015–2019 general elections. However, 52% of respondents confirmed that the extent to which social media platforms are being used in political sensitization in Nigeria is moderate. This is supported by the fact that 45% of respondents were of the view that the social media platforms are used less than three times in political sensitization in Nigeria. The qualitative finding equally revealed that the extent to which social media platforms are being used in political sensitization in Nigeria is moderate. This is in line with Nagi (2018) study which revealed that the use of social media has made it easy to produce and disseminate news, and as such has become a fertile ground for electioneering campaign. Supporting the finding of this study, Boulianne, (2015) noted that the use of social network for influence has birthed new ideological dimensions that motivate an individual or a forum to access channels for diverse views and for political advocacy.

Communicating findings from mean analysis revealed that social media platforms have not been effective in political sensitization in Nigeria. On the other hand, the qualitative finding is also in line with the quantitative finding. Corroborating this finding, Adeyanju and Haruna, (2012) in their study revealed a two-way channel between the citizens and the government. In the study of Auger (2013); Abbott (2014) on effectiveness of combating fake news on social media with source ratings revealed that among the expert rating, user article rating, and user source rating, source ratings influenced social media users' beliefs in the articles and that source rating is a viable measure against fake news. From the theoretical perspective, the public sphere theory explains that there is a "space" which provides open 17 fora for public discussion and accessing it is usually free. Given that anyone can access them and use them, they could give the opportunity for fake news to be spread and hate speech to be promoted, and by implication dampen the effectiveness of social media in combating fake news, hate speech, and extremism.

Findings also revealed that some of the challenges affecting the usage of social media in combating extremism, hate speech, and fake news, as confirmed by the respondents, were that since hate speech bill has not been passed, it posed a challenge to the use of social media platforms in combating extremism, hate speech, and fake news, because everyone will be at liberty to do anything without regulation as the case may be. Also, the free access to social media platforms that encourages anyone to use the platforms constitutes a challenge, too. Furthermore, the lack of respect for the federal character prevents the use of social media platforms in combating

extremism, hate speech, and fake news, as confirmed by the respondents. Government's attitude and some of its policies pose a challenge to the use of social media in combating extremism, hate speech, and fake news. The qualitative findings were no different from the quantitative findings, as the participants expressed similar concerns as identified in the quantitative findings. In line with these findings, Ajayi and Adesote (2015) in their study, revealed that authorities of many countries today are rapidly recognizing hate speech as a grave challenge, because it is difficult to create obstacles on the internet to prevent the spread of hate across countries. In the study of Ross, Jung, Heisel and Stieglitz (2018) it was revealed that social media have made it easy for fake news to thrive because of the free access to them.

Conclusions

The introductory aspect of the research laid the foundation for the work by expatiating on the statement of the research problem, the methodology, and the research objectives. The researchers examine and scrutinize works of different scholars from different countries across different continents in connection with our research topic and the related terms and concepts. The scholars generally discussed the roles the social media are expected to play in Nigeria's Fourth Republic. The study noted that continuous rise in extremism, hate speech, and fake news spread in contemporary Nigeria is problematic. These issues are capable of causing tension and then disintegration if not properly handled. Based on the findings, it is therefore safe to conclude that the extent to which the social media platforms are being used during the 2015–2019 general elections could be the reason for not being effective in combating extremism, hate speech, and fake news in Nigeria. The role of the social media in the consolidation of Democracy in any particular country is facilitative, supportive and determined by the nature of the society itself. To be effective, the social media need an enabling environment.

Recommendations

Based on the reported findings the researchers recommend that:

Social media platforms should be used very often so as to raise the consciousness of people towards the dangers of extremism, hate speech, and fake news. Social media contents should be designed in such a way they will be very effective in influencing people to disengage from extremism, hate speech, and fake news. Other measures need to be introduced to go hand-in-hand with social media in order to curb the scourge. Those who use the social media platforms to promote extremism hate speech, and fake news as a result of its free access should be reorientated so as to desist from the act. On the other hand, government should be advised to introduce policies that will not fuel extremism, hate speech, and fake news among the people.

Independent National Electoral Commission (INEC) and National Orientation Agency (NOA) should carry out massive improved political education program to educate the electorate on how to decipher between true facts spread by the media by critically analyzing the reports by media organizations and social media handlers.

National Broadcasting commission (NBC) and Advertising Practitioners Council of Nigeria (APCON) should ensure that there are presidential debates ahead of the elections to enable the citizenry to evaluate the candidates and determine who is competent to rule the country. This would make the electorate more objective instead of relying only on social media reports.

The electorate themselves should learn to be objective and not just flow with the wind and caprices of whatever individuals or the social media give out information. They should critically analyze and make inquiries before voting on a candidate that will not bring about growth and development in the country.

The Nigerian Press Council and Broadcasting Organization of Nigeria (BON) should monitor hate speech and attacks on personalities that could lead to violence, and sanction media houses, social media handlers that go against the regulations and code of conduct of the broadcasting and press institution.

Independent National Electoral Commission (INEC) and the Department of State Security should collaborate to monitor the electioneering campaigns of candidates of various political parties to ensure that they do not engage in hate speech. Offenders should face stiff sanctions up to disqualification from contesting election for repeated abuse.

APPENDIX I: QUESTIONNAIRE ITEMS

Please tick your response (√)

Respondents' Sex

	Section A: Demographic Characteristics of Respondents	Coding Categories	Skip to
1	2	3	4
101	Sex	Male .... 1 Female 2	
102	Age	18–23 years .... 1 24–29 years .... 2 30–35 years .... 3 36–Above years 4	
103	Educational Qualification	Primary School Cert .... Secondary School Cert....................................... Tertiary Certificate .... Other, Specify	
104	Employment Status	Civil Servant .... Unemployed .... Retired... Self- Employed .... Others, Specify..	
105	Occupation	Farming .... Trading .... Politician.. Other, Specify	

Section B: Role of Social Media in Political Participation/Sensitization

1	2	3	4
201	Do you use Social Media?	Yes..1 No...2	Skip to
202	On What forms of social media are you familiar with?	Print Media..1 Electronic Media ....2 Others ....3 None...4	
203	What are the roles of the social media during election campaign?	Provision of information events ....1 Provision of comments including guidance and advice in relation to events ....2 Provision of a forum for access channels for diverse views and for political advocacy.........3 Provision of a two-way channel between citizens and government ....4 Acting as critic or watchdog in order to hold the government to account....................................5	
204	In what form do you use Social Media at the 2015–2019 Election?	Campaign...1 Voting Coverage...2 Distribution of election material coverage............3 Counting of voter's coverage.............................4	
205	What motivated you to use social media during the election?	My Political Party ....1 Political Candidate..2 N.G.O ....3 Freewill 4	
206	Which of the following Social Media do you use during the 2015–2019 General Election?	Facebook...1 WhatsApp ....2 Instagram...3	
207	Which electronic device do you use during the 2015–2019 General Election?	Android Phone..1 Iphone...2 Palm Tablet ....3 Computer 4	
208	Does the social media influence efficiency of 2015–2019 General Election?	Yes ....1 No ....2 I don't know 3	
209	How would you rate the impact of mass media in the Democratic Processes in Nigeria's 2015–2019 General Election?	High ....1 Very High ....2 Low...1 Very Low ....2 I don't know 3	
210	Do you think the social media are well equipped to carry out their function effectively?	Yes..1 No...2 I don't know 3	
211	Do you agree that the social media has effective role to play in the Democratic Processes?	Strongly agree ....1 Agree ....2 Strongly Disagree...3 Disagree...4	
212	Would you say that media reports on election contributed to the credibility of the election?	Yes..1 No...2 I don't know...3	

1	2	3	4
213	Do you perceive media reports during 2019 General Election as credible?	Yes.. 1 No... 2 I don't know 3	
214	Do you think that the passage into law of the Freedom of Information Bill will enhance public accountability issues in Nigeria's Democratic Press?	Yes.. 1 No... 2 I don't know 3	

Thank you for your cooperation.

APPENDIX II: INTERVIEW GUIDE

The following questions were asked to participants:

The interview guide helped to answer research questions framed in the course of the study. These questions were posed to participants drawn from government institution, NGO, agency and ministry.

– The researcher will ask questions in relation to the efficiency of social media platforms and Political Participation in South-Eastern Nigeria during the 2015–2019 General Elections. Follow up question will be asked.

– The researcher will like to know the extent of usage of social media platforms in combating extremism, hate speech and fake news in South-Eastern Nigeria during the 2015–2019 General Election. Follow up question will be asked.

– The researcher will like to know how effective is social media platforms Political Participation in South-Eastern Nigeria during the 2015–2019 General Elections. Follow up question will be asked.

– The researcher will like to know the challenges affecting the usage of social media platforms and Political Participation in South-Eastern Nigeria during the 2015–2019 General Elections. Follow up question will be asked.

– The researcher will like to suggest ways of improving social media platforms and Political Participation in South-Eastern Nigeria during the 2015–2019 General Elections. Follow up question will be asked.

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Citation

Główne determinanty migracji zarobkowych Polaków do państw Unii Europejskiej po 2004 roku i ich następstwa

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Słowa kluczowe: migracje zarobkowe, Unia Europejska, determinanty migracyjne, społeczne następstwa migracji

Abstrakt   Przystąpienie Polski do Unii Europejskiej w 2004 roku pozwoliło na swobodny przepływ obywateli i migracje zarobkowe. Na początku naszego członkostwa w UE rynki pracy otworzyły: Szwecja, Irlandia, Wielka Brytania, a w 2006 roku: Finlandia, Grecja, Hiszpania, Portugalia oraz Włochy i Holandia. Pozostałe państwa członkowskie czekały na przystąpienie Polski do układu Schengen (21 grudnia 2007 r.). Od 30 marca 2008 roku Polacy, bez kontroli osobowych na granicach wewnętrznych, mogą przekraczać granice Wspólnoty. W 2011 roku zniesiono wszelkie ograniczenia dla Polaków na rynku pracy w państwach UE. Wyjazdy zarobkowe Polaków w drugiej dekadzie XXI wieku mają charakter krótkoterminowy lub długoterminowy (dotyczy to także rezydentów), pierwsze z nich objęły ponad 2 miliony obywateli rocznie. Poza korzyściami materialnymi dla migrantów istnieją także skutki negatywne, związane z rozłąką rodzin czy ograniczeniem kontroli nad wychowaniem młodego pokolenia oraz opieką nad seniorami.

Main Determinants of Poles' Economic Migration to the European Union Countries after 2004 and Their Consequences

Keywords: labor migrations, European Union, migration and social determinants, consequences of migration

Abstract   Poland's accession to the EU in 2004 allowed for free movement citizens and labor migrations. From the beginning of our membership in the EU, labor markets was opened by: Sweden, Ireland, Great Britain, and in 2006: Finland, Greece, Spain, Portugal as well as Italy and the Netherlands. The other member states waited for Poland's accession to the Schengen Agreement (December 21, 2007). From March 30, 2008, Poles, without personal checks at internal borders, they may cross the borders of the Community. Since 2011, all restrictions for Poles on the labor market in EU countries have been abolished. Poles' economic migration in the second decade of the 21st century is short-term or long-term (this also applies to resi-

dents), the first of them amounted to over 2 million citizens annually. Besides material benefits for migrants, there are also consequences negative, related to the separation of families or limitation of control over the upbringing of the young generations and caring for seniors.

Wprowadzenie

Pierwsze duże migracje Polaków rozpoczęły się już na przełomie XIX i XX wieku, przed pierwszą wojną światową, kiedy to „za chlebem" do Stanów Zjednoczonych wyjechało ponad 4 mln osób. Proces ten powtórzył się w okresie II Rzeczypospolitej – w poszukiwaniu lepszych warunków do życia wyjechało około 2,1 mln osób. Do kolejnej fali migracji z powodów ekonomicznych (i politycznych) doszło w latach 80. XX wieku, kiedy to z Polski wyjechało 2,2 mln osób (Bobrowska, 2013, s. 50–52). W ostatnich latach – po roku 1989 – zauważalnie zwiększyła się skala emigracji. Istotną sprawą jest tu zapewne transformacja ustrojowa, która dokonała się w Polsce 32 lata temu (Horolets, Lesińska, Okólski, 2019, s. 8–11). Zmiany polityczne w 1989 roku spowodowały, że Polacy, dostrzegając zachodzące procesy migracyjne, wykorzystali możliwości zatrudnienia w innych państwach UE (po 2004 r.), a nasze państwo stało się istotnym krajem tranzytowym (MSWiA, 2011, s. 4–5).

Postępująca globalizacja, przemiany ekonomiczne i polityczne w poszczególnych krajach Unii Europejskiej, kryzysy demograficzne, konflikty międzynarodowe, a także przemiany kulturowe wymuszają podejmowanie odpowiednich decyzji, które związane są m.in. z nasilającymi się procesami migracyjnymi. Według prognoz dla Unii Europejskiej do 2040 roku dojdzie do dużych zmian populacyjnych. Liczba ludności zmaleje z 344 mln do 304 mln. Będzie się to wiązało ze wzrostem ludności w wieku poprodukcyjnym (Iglicka, Olszewska, Stachurski, 2005, s. 3–4). Migracje ekonomiczne (lub inaczej zarobkowe) najczęściej motywowane są kwestiami finansowymi. Stwarzają one szansę na podwyższenie zarobków migrantów, a tym samym standardu ich życia. Celem wyjazdu jest zmiana własnego statusu społecznego, podniesienie prestiżu wśród rodziny i znajomych poprzez poznanie innej kultury, języka czy zdobycie doświadczenia zawodowego. Wyjazdy zarobkowe motywowane są również dysproporcją w zarobkach między Polską a innymi krajami, niezadowalającym systemem socjalnym i frustracją wywołaną własną sytuacją bytową (Homoncik, Pujer, Wolańska, 2017, s. 7–9).

Polska zmaga się z wieloma problemami wpływającymi na naszą sytuację demograficzną. Należą do nich: postępująca globalizacja, mały przyrost naturalny, a także powiększająca się stale liczba osób w wieku poprodukcyjnym i duży odsetek osób przebywających na stałe poza granicami kraju (Zespół do Spraw Migracji, 2019, s. 3). Jak wynika z danych statystycznych, przyrost naturalny z roku na rok maleje, a rośnie liczba osób w wieku poprodukcyjnym. Według prognoz Głównego Urzędu Statystycznego liczba osób w wieku poprodukcyjnym (powyżej 60. roku życia) w 2020 roku stanowiła 25,9% ogółu ludności, a w najbliższych latach ulegać będzie zwiększeniu – w 2030 roku wyniesie 29,0 %, w 2040 – 34,4%, a w 2050 – 40,4% ogółu ludności (MRPiPS, 2017, s. 16).

Cele i metody badań

Celem prezentowanego artykułu jest przedstawienie znaczenia procesów migracyjnych dla zmian ekonomicznych i demograficznych w Polsce. Analiza została zawężona do tzw. migracji zarobkowych o charakterze ekonomicznym. Badaniu poddano zjawisko migracji zarobkowej z Polski powyżej 3 miesięcy do 12 miesięcy (krótkookresowe), od 2004 roku, tj. od wstąpienia Polski do UE. Samo zjawisko migracji analizowane jest z wykorzystaniem metod ilościowych: porównawczej oraz analizy strukturalnej i opiera się na dostępnych danych statystycznych. Autor wybrał ważne dla polskich procesów migracyjnych daty, które pozwolą na uchwycenie zachodzących zmian. Rok 2004 związany jest ze wstąpieniem Polski do UE, rok 2015 to z kolei kulminacyjny okres napływu migrantów do Europy z Bliskiego Wschodu i Północnej Afryki, co zmieniło stosunek wielu państw do zjawiska migracji; ostatnie trzy daty, lata: 2018 (szczytowy moment wyjazdów krótkoterminowych Polaków do UE) oraz 2019 i 2020 związane są z problemami migracyjnymi w okresie pandemii COVID-19 oraz wystąpieniem Wielkiej Brytanii z UE, wywołanym brexitem, co w znaczny sposób miało i będzie mieć wpływ na kwestie migracji zarobkowych Polaków. Ze względu na ograniczone ramy artykułu autor nie podejmuje tematu migracji zarobkowych Polaków w terminach długookresowych (12 miesięcy i powyżej), np. w 2020 roku dotyczyło to 12 272 osób, czy kwestii emigrujących Polaków na pobyt stały do państw UE (GUS, 2021b, s. 224–225). Według prognozy demograficznej Głównego Urzędu Statystycznego liczba Polaków w 2030 roku ma wynosić 37 185 tys., w 2040 roku 35 668 tys., w 2050 roku 33 951 tys. osób. Sytuacja wygląda jeszcze gorzej, gdy przyjrzymy się populacji w wieku produkcyjnym, która maleje analogicznie do 58% w 2030, 54,7% w 2040 oraz 48,8 % w 2050 roku, co stawia nasz kraj w gronie poszukujących w przyszłości migrantów, niezbędnych na polskim rynku pracy (GUS, 2021b, s. 227).

Autor stara się znaleźć odpowiedź na pytania dotyczące pozytywnych i negatywnych następstw krótkoterminowych wyjazdów zarobkowych, najczęściej sezonowych. Zwraca także uwagę na pogłębiający się tzw. drenaż mózgów, który dotyczy osób najlepiej przygotowanych do pracy zarobkowej poza granicami Polski, co nie tylko może być powodem dalszego przedłużania kontraktów o zatrudnieniu, ale pozbawia nasz kraj dobrze przygotowanych, wykształconych pracowników. Co gorsze, za granicą większość dobrze wykształconych Polaków zatrudniana jest poniżej ich wykształcenia i posiadanych kwalifikacji. Innym istotnym aspektem migracji są kwestie społeczne. Towarzyszy im często proces rozłąki z rodziną, przyjaciółmi, a szczególnie z dziećmi – najbardziej potrzebującymi wsparcia, opieki i pomocy. Konsekwencją takiej sytuacji mogą być np. trudne do opanowania patologie.

W przeprowadzonej analizie można postawić hipotezy badawcze: 1) migracje zarobkowe Polaków po 2004 roku związane są głównie z poszukiwaniem legalnej pracy; 2) w znaczny sposób zmieniła się struktura emigrantów z Polski – opiera się na ludziach młodych, dobrze wykształconych, z dobrą znajomością języków obcych (głównie angielskiego), pochodzących z różnych ośrodków; 3) krótkookresowe migracje zarobkowe Polaków mają głównie na celu poprawę ich kondycji ekonomicznej, a emigranci nie planują (w tym okresie) wyjazdów długookresowych czy na pobyt stały.

Wśród dotychczasowych opracowań podejmujących tematykę migracji zarobkowych na uwagę zasługują prace autorskie i redagowane m.in. przez: A. Bobrowską, H. Chałupczak, R. Jończy, P. Kaczmarek, M. Lesińską, K. Markowskiego, M. Okólskiego oraz dane źródłowe publikowane przez GUS (w ramach prowadzonych od 1992 r. Badań Aktywności Ekonomicznej Ludności – BAEL), MSWiA, MRPiPS, znajdujące się w rocznikach demograficznych i statystycznych oraz w raportach, np. Gi Group (i inne – pełen wykaz w bibliografii).

Determinanty wpływające na podjęcie decyzji o wyjazdach zarobkowych Polaków

Bardzo istotnym aspektem, będącym fundamentem praw Unii Europejskiej, jest możliwość swobodnego przemieszczania się obywateli UE pomiędzy krajami Wspólnoty. Przystąpienie Polski do UE w 2004 roku pozwoliło na swobodny przepływ migrantów i migracje zarobkowe Polaków. Na początku naszego członkostwa w UE rynki pracy otworzyła Szwecja, Irlandia, Wielka Brytania, a w 2006 roku Finlandia, Grecja, Hiszpania, Portugalia oraz Włochy i Holandia. Pozostałe państwa członkowskie czekały na wejście Polski do układu Schengen (21 grudnia 2007 r.). Od 30 marca 2008 roku Polacy, bez kontroli osobowych na granicach wewnętrznych, mogą przekraczać granice Wspólnoty, a od 2011 roku podejmować pracę w każdym państwie UE (*Sytuacja demograficzna Polski do 2019 r.*, 2020, s. 72).

Wśród motywów wpływających na podjęcie decyzji o migracji możemy wymienić te o podłożu ekonomicznym, demograficznym, społeczno-politycznym oraz środowiskowym. Migracje zarobkowe związane są z chęcią poprawy sytuacji ekonomicznej, polepszenia warunków życia i stabilizacją, a także z możliwością zmniejszenia frustracji, wynikającej z braku pespektyw na poprawę statusu materialnego, oraz realizacją własnych aspiracji zawodowych. Jak każdy z rodzajów migracji, również migracje zarobkowe opierają się na dwóch rodzajach czynników („wypychające" i „przyciągające"), wpływających na ich rozwój. Za czynniki „wypychające", skłaniające do poszukiwaniu nowych perspektyw ekonomicznych za granicą, możemy uznać: ubóstwo, bezrobocie, niskie płace, wysoki przyrost naturalny, brak podstawowej opieki medycznej czy braki w systemie edukacji. Wśród czynników „przyciągających", ograniczających skalę wyjazdów zarobkowych, możemy wymienić: perspektywę wyższych zarobków, poprawy standardu życia, rozwój osobisty lub zawodowy (Mansoor, Quillin, 2006, s. 78). Niewątpliwie migracje zarobkowe zaliczane są do najczęstszych. Polegają one na przemieszczaniu się ludności w takie miejsce, które nie jest ich krajem pochodzenia, ale które daje możliwość podjęcia pracy, co w konsekwencji ma wpłynąć na podniesienie dochodów, a także standardu życia. Samo zjawisko ma charakter przejściowy. Wśród migrantów zarobkowych można wyodrębnić migrantów kontraktowych i wahadłowych. Migranci wahadłowi to osoby, które wyjeżdżają tylko na chwilę, mają kontakt z rodziną i miejscem zamieszkania, a ich praca bardzo często jest niezalegalizowana. Migranci kontraktowi opuszczają kraj w celu podjęcia pracy, która jest legalna, a sam wyjazd jest zorganizowany i w pełni ustalony z pracodawcą. Można stwierdzić, że migracje zarobkowe są umotywowane wyłącznie chęcią poprawy warunków życia (Jończy, 2016, s. 39–40).

Do innych przyczyn migracji można zaliczyć chęć sprawdzenia siebie i swoich umiejętności i kwalifikacji wśród międzynarodowych korporacji i zagranicznego biznesu. Kolejnym, wspomnianym już problemem, jest różnica w zarobkach w porównaniu z innymi krajami UE, a niskie wynagrodzenia oferowane przez pracodawców krajowych wciąż powodują zainteresowanie Polaków rynkiem zachodnim. Często też, oprócz niskich zarobków, powodem migracji jest brak odpowiednich kwalifikacji lub po prostu brak możliwości podjęcia wymarzonej pracy.

W tym miejscu warto jeszcze wspomnieć o sieci EURES, czyli Europejskiej Służbie Zatrudnienia, do której Polska wstąpiła, stając się członkiem Unii Europejskiej. Sieć działa na terenie całej Wspólnoty i głównym jej zadaniem jest wspieranie mobilności pracowników na europejskim rynku pracy. Dzięki niej Polacy mogą dotrzeć do rynków zagranicznych. Sieć EURES świadczy usługi w zakresie unijnego pośrednictwa pracy i informowania w zakresie warunków życia i pracy w państwach członkowskich UE i EFTA (*Informacje o EURES*, 2021).

Jak podaje Work Service (w badaniach opublikowanych z 2021 roku), do przyczyn kształtujących migracje Polaków obok wyższych zarobków (79%) i wyższego standardu życia (47%) można zaliczyć także lepsze warunki socjalne (31%), lepsze perspektywy rozwoju zawodowego (35,7%), brak odpowiedniej pracy w Polsce (31%), możliwość podróżowania (25%), korzystniejszy system podatkowy (20%), bardziej przyjazną administrację publiczną (11%), bezpieczniejsze położenie geopolityczne (14%), a także obecność rodziny lub bliskich, którzy mieszkają lub zamierzają zamieszkać za granicą (4%) (Raport Gi Group, listopad 2021, s. 21).

Według badanych największą barierą, która powstrzymuje Polaków przed wyjazdem do pracy za granicę, jest przywiązanie do rodziny i przyjaciół w Polsce (65%) oraz atrakcyjna praca w kraju (38%). Do innych przeszkód zaliczają zbyt silne różnice kulturowe, mentalne (18%), nieznajomość języka obcego (12%), kłopoty zdrowotne (11%), brak wystarczających środków na wyjazd i osiedlenie się (10%), a także brak odpowiednich kwalifikacji – brak uprawnień, nieznajomość rynku (10%), małe szanse na znalezienie pracy (8%) (Raport Gi Group, listopad 2021, s. 25).

Kto obecnie chciałby wyjechać do pracy do bogatszych państw UE? Według danych Work Service są to mężczyźni (70%) w wieku od 24 do 34 lat z wykształceniem podstawowym lub zawodowym (42%), mieszkający w małych miastach we wschodnich rejonach Polski. Osoby te perforowałyby zatrudnienie w usługach (38,4%) lub przemyśle (14,1%) (Raport Gi Group, listopad 2021, s. 14–20).

Główne kierunki migracji zarobkowych Polaków w XXI wieku

Migracja to zjawisko o dynamicznym charakterze. Na przestrzeni kilkunastu lat nasiliło się i objęło praktycznie cały świat. Oznacza to, że coraz więcej osób decyduje się, aby zmienić swoje dotychczasowe miejsce zamieszkania, a każdy kraj może być nie tylko źródłem, ale i celem migracji (Lisiecki, 2008, s. 7). Procesy migracji wywierają ogromny wpływ nie tylko na życie migranta, ale także na kraj docelowy, do którego on przybywa, i na kraj, z którego wyjeżdża. W XXI wieku w Polsce zostały przeprowadzone trzy narodowe spisy powszechne – w 2002, 2011 i 2021 roku (wyniki ostatniego są w trakcie opracowania). Według tych danych emigracje na pobyt czasowy uległy wyraźnej zmianie. W 2002 roku czasowo za granicą przebywało 786,1 tys., natomiast w 2011 roku już 2017,5 tys. Polaków. Spośród tych osób 72,8% jako przyczynę wyjazdu wskazywało

pracę. Warto zauważyć, że 83% emigrantów było w wieku produkcyjnym, a 65% w produkcyjnym mobilnym, tj. poniżej 45. roku życia (*Sytuacja demograficzna Polski do 2019 r.*, 2020, s. 93–94). Zmianie uległ również charakter migracji, przyjmując głównie cechy legalności zatrudnienia.

Głównymi kierunkami emigracji zarobkowych wybieranymi przez Polaków są tzw. stare państwa UE: Niemcy, Holandia, Włochy, Irlandia, a także (również po brexicie) Wielka Brytania i znajdująca się poza UE Norwegia. W tabeli 1 przedstawiono liczbę osób z Polski, które przebywały czasowo za granicą w latach 2004–2020 (GUS, 2021a).

Tabela 1. Emigracja z Polski na pobyt czasowy w wybranych latach i państwach

Kraj przebywania	Liczba emigrantów* (tys.)				
Wybrane państwa UE	2004	2015	2018	2019	2020
Austria	15	36	41	41	41
Belgia	13	52	54	53	52
Czechy	–	9	10	10	10
Dania	–	30	34	34	34
Finlandia	0,4	3	3	3	3
Francja	30	64	64	63	63
Grecja	13	8	7	7	5
Hiszpania	26	30	28	28	28
Holandia	23	112	123	125	135
Irlandia	15	111	113	112	114
Niemcy	385	655	706	704	706
Portugalia	0,5	1	1	1	1
Szwecja	11	46	51	51	49
Wielka Brytania	150	720	695	678	–
Włochy	59	94	90	88	86
Ogółem UE	750	1983	2031	2008	1339
Kraje spoza UE	20	115	124	126	634
Norwegia	–	84	86	88	87
Wielka Brytania	–	–	–	–	514**

* liczba osób przebywających za granicą na koniec danego roku

** Od zawiadomienia o wejściu w życie Umowy o wystąpieniu Zjednoczonego Królestwa Wielkiej Brytanii i Irlandii Północnej z Unii Europejskiej i Europejskiej Wspólnoty Energii Atomowej (Dz. Urz. UE L 29 z 31 stycznia 2020 r., s. 189).

Źródło: GUS (2021a), s. 2.

Jak wynika z powyższych danych, rok 2020 przyniósł spadek wielkości migracji Polaków na pobyt czasowy do Wielkiej Brytanii, która w drugiej dekadzie XXI wieku była głównym kierunkiem (obok Niemiec) migracyjnych wyjazdów naszych rodaków, z 678 tys. do 514 tys. (mniej o 164 tys.), co może być związane z niepewnością wynikającą z nadchodzącego brexitu.

Warto jednak zauważyć wcześniejszy, gwałtowny wzrost migracji czasowej Polaków nad Tamizę w stosunku do 2004 roku: 2015 – 720 tys., 2018 – 695 tys., 2019 – 678 tys. (Kisiel, Lizińska, Roso-chacka, 2017, s. 134–136). Obok Wielkiej Brytanii mniejszy napływ migrantów zarobkowych zaob-serwowano we Włoszech i w Szwecji. Wzrosło zainteresowanie wyjazdami do Niemiec i Irlandii (pomimo zagrożenia COVID-19), a także Holandii i nienależącej do UE Norwegii (GUS, 2021a). W okresie zagrożenia COVID-19 zmienił się także stosunek do wyjazdów zarobkowych. Pre-ferowane wyjazdy krótkoterminowe do trzech miesięcy, które jeszcze w 2018 roku planowało 37% osób, są obecnie rozważane przez 18%. Planujący swoje pobyty z czasowym zatrudnieniem opowiadają się za wyjazdem minimum półrocznym (Raport Gi Group, listopad 2021, s. 24).

W szczegółowej analizie GUS-u według województw w 2019 roku za granicą powyżej trzech miesięcy przebywało 2150 tys. osób, z czego 1204,1 tys. to mężczyźni, a 1210,9 tys. to kobiety. Najwięcej emigrujących zarobkowo mężczyzn – 273,9 tys. pochodziło z w wojewódz-twa śląskiego, 228,4 tys. z dolnośląskiego i 220,4 tys. z województwa małopolskiego. Najmniej z województwa świętokrzyskiego – 74,7 tys. Podobnie wyglądają dane dotyczące emigrujących kobiet – 146,7 tys. z województwa śląskiego, 121,7 tys. z dolnośląskiego i 116,7 tys. z małopol-skiego. Najmniej kobiet emigrowało w celach zarobkowych z województwa łódzkiego – 20,4 tys., lubuskiego – 24,3 tys. i świętokrzyskiego – 29,0 tys. (więcej szczegółowych danych w tab. 2).

Tabela 2. Ludność przebywająca czasowo za granicą powyżej 3 miesięcy, według charakteru miejscu zamieszkania przed wyjazdem i województw, w 2019 roku

Województwa	Ogółem	Miasta	Wieś
	w tys.		
Ogółem	2150,0	1599,5	815,5
Dolnośląskie	228,4	183,9	52,0
Kujawsko-pomorskie	127,9	90,1	37,8
Lubelskie	133,5	76,9	56,6
Lubuskie	75,4	51,1	24,3
Łódzkie	89,4	69,0	20,4
Małopolskie	220,4	128,2	106,6
Mazowieckie	168,6	135,8	40,4
Opolskie	136,3	65,6	70,7
Podkarpackie	210,5	102,3	108,2
Podlaskie	129,7	84,2	45,6
Pomorskie	160,1	122,1	46,2
Śląskie	273,9	216,6	57,3
Świętokrzyskie	74,7	47,7	29,0
Warmińsko-mazurskie	128,3	83,6	44,6
Wielkopolskie	128,9	86,0	42,9
Zachodniopomorskie	128,9	94,1	34,8

Źródło: *Sytuacja demograficzna Polski do 2019 r.* (2020), s. 101.

Według danych Głównego Urzędu Statystycznego z 2020 roku (dotyczących końca 2019 r.) więcej osób wyjeżdżało za granicę z ośrodków miejskich – 1599,5 tys. niż z ośrodków wiejskich – 815,5 tys. Najliczniejszą grupę stanowiły osoby z województwa śląskiego, dolnośląskiego i mazowieckiego. Najmniej osób wyjeżdżało w poszukiwaniu pracy za granicą z województwa świętokrzyskiego. Z kolei najwięcej osób migrantów zarobkowych z ośrodków wiejskich pochodziło z województwa podkarpackiego i małopolskiego, a najmniej z województw lubelskiego, świętokrzyskiego, kujawsko-pomorskiego i lubuskiego (*Sytuacja demograficzna Polski do 2019 r.*, 2020) (więcej szczegółowych danych w tab. 2).

Tabela 3. Ludność przebywająca czasowo za granicą powyżej 3 miesięcy, według płci i grup wiekowych, w 2019 roku

Grupy wieku	Ogółem	Mężczyźni	Kobiety
	w tys.		
Ogółem	2415,0	1204,1	1210,9
0–4	67,4	35,3	32,0
5–9	76,7	40,2	36,5
10–14	95,5	49,3	46,2
15–19	84,8	43,3	41,6
20–24	129,7	64,7	65,0
25–29	210,5	104,7	105,9
30–34	300,6	147,6	153,1
35–39	361,2	179,0	182,2
40–44	279,9	144,2	135,7
45–49	197,2	101,8	95,4
50–54	167,1	84,7	82,4
55–59	156,1	78,5	77,6
60–64	123,1	60,5	62,5
65–69	71,3	33,8	37,5
70–74	36,2	16,0	20,2
75 lat i więcej	57,7	20,5	37,2

Źródło: *Sytuacja demograficzna Polski do 2019 r.* (2020), s. 98.

Rozróżniając ludność przebywającą czasowo za granicą powyżej trzech miesięcy według grup wiekowych możemy zauważyć, że w 2014 roku dominowały osoby pomiędzy 20. a 29. rokiem życia; w 2017 roku najwięcej osób było w przedziale 40–44 lata – 377,8 tys., a najmniej w przedziale 70–74 lata – 30,0 tys. osób. Według danych Głównego Urzędu Statystycznego w 2018 roku najliczniejszą grupą przebywającą poza granicami naszego kraju na okres dłuższy niż trzy miesiące były osoby w wieku 30–39 lat. Analizując dane GUS z 2018 roku, można

zauważyć, że najwięcej mężczyzn przebywających poza granicami kraju powyżej trzech miesięcy znajdowało się w przedziale wiekowym 35–39 lat – 189,7 tys. oraz 30–34 lata – 178,9 tys., a także 40–44 lata – 137,7 tys. Najmniejszą grupę mężczyzn stanowili ci między 70–74 rokiem życia – 12,9 tys. Wśród kobiet liczby przedstawiają się dosyć podobnie: najwięcej kobiet było między 30. a 34. rokiem życia – 191,0 tys., a także między 35. a 39. rokiem życia – 188,1 tys. oraz między 40. a 44. rokiem życia – 127,5 tys. Szczegółowe dane umieszczono w tabeli 3.

Emigracja zarobkowa z Polski po 2004 roku. Bilans strat i korzyści

W bilansie zysków i strat migracji zarobkowych z Polski trudno wysnuć jednoznaczne wnioski. Czy zatem istnieją korzyści? Na niektóre z nich warto zwrócić uwagę w sytuacji migracji długotrwałej czy emigracji całej rodziny: „Poza niewątpliwymi pozytywami ekonomicznymi są to także walory edukacyjne (zwiększona motywacja do nauki języków), kulturowe (poznawanie innych kultur wpływa na stosunek do odmienności) oraz tożsamościowe (wyjazd za granicę)" (Czerniejewska, 2013, s. 140). Spośród korzyści z migracji w skali makro należy z pewnością wymienić zmniejszenie napięcia społecznego dotyczącego trudnej sytuacji na rynku pracy, który nie mógł wchłonąć dużej liczby nowych roczników wchodzących na ten rynek. Stopa bezrobocia w Polsce spadła z 19% na początku 2004 roku do 11,4% w roku 2014, do 5,4% w 2021 roku (tab. 4).

Tabela 4. Stopa bezrobocia w Polsce w wybranych latach (w %)

Rok	2004	2005	2006	2007	2008	2009	2010	2011	2012
Stopa	19,0	17,6	14,8	11,2	9,5	12,1	12,4	12,5	13,4

Rok	2013	2014	2015	2016	2017	2018	2019	2020	2021
Stopa	13,4	11,4	9,7	8,3	6,6	5,8	5,2	6,3	5,4

Źródło: GUS (2022).

Bezrobociu towarzyszy wiele negatywnych skutków: ubożenie społeczeństwa, a w następstwie tego obniżenie się warunków materialnych, społecznych i życiowych części ludności; wzrost przestępczości; lęk o przyszłość swoją i swojej rodziny; stagnacja zawodowa; frustracja; poczucie rezygnacji i braku perspektyw na szybką poprawę; problemy zdrowotne; spadek poczucia własnej wartości, co może skutkować zwiększeniem się prawdopodobieństwa uzależnień od alkoholu lub narkotyków. Powyższe czynniki mogą skłonić do natychmiastowej chęci opuszczenia rodzinnego kraju (Wojnicz, 2016, s. 131–135).

Jednym z pozytywów zagranicznych migracji zarobkowych Polaków są transfery pieniężne. Osoby pracujące za granicą przesyłają znaczne kwoty finansowe, głównie członkom swoich rodzin. Ma to także negatywne konsekwencje, a rodziny migrantów w Polsce zaczynają ograniczać swoją aktywność zawodową, licząc na stałe zabezpieczenie finansowe pozyskiwane z takich transferów (Iglicka, 2008, s. 68–69). Napływ transferów z zagranicy skutkuje wzrostem ilości pieniądza w obiegu (skup walut znacznie przewyższa ich sprzedaż) (Puzio-Wacławik, 2010, s. 185–186).

Polscy emigranci wykazują skłonności do nabywania znanych im produktów z krajowego rynku, co prowadzi do wzrostu eksportu do kraju ich goszczącego. W wielu państwach UE, gdzie znajdują zatrudnienie Polacy, powstają polskie restauracje i sklepy, trudniące się sprowadzaniem towarów z Polski (Puzio-Wacławik, 2010, s. 188).

Negatywnym skutkiem jest niewątpliwie fakt, że większość polskich emigrantów podejmuje się za granicą prac poniżej swoich kwalifikacji i poziomu wykształcenia. W konsekwencji wielu z nich, po latach pracy w sektorze usług, niewymagającej specjalnych kwalifikacji, nie będzie mogło liczyć na awans ani za granicą, ani w Polsce. W razie powrotu do kraju niektórych może dotknąć zjawisko podwójnej marginalizacji, co może skutkować, zwłaszcza w ujęciu regionalnym, wzrostem stopy bezrobocia.

Inną kwestią są społeczne koszty procesów migracyjnych, czyli koszty związane z rozłąką z rodziną, z rozpadem rodziny, z osłabieniem więzi społecznych oraz ze zjawiskiem eurosieroctwa (Iglicka, 2008, s. 63–68). W wielu wypadkach efektem eurosieroctwa jest wagarowanie, problemy z nauką, porzucanie szkoły, agresja, kontakt z alkoholem i narkotykami, wchodzenie w środowiska patologiczne (Kozak, 2010, s. 114–116).

Poza tym kraj opuszczają zwłaszcza ludzie młodzi, do 40. roku życia. Dla Polski ma to niekorzystne następstwa zarówno w sferze ekonomicznej, jak i demograficznej. Priorytetem stają się więc decyzje o zagranicznych wyjazdach zarobkowych, natomiast ewentualne założenie czy powiększenie rodziny schodzi na dalszy plan (Samoraj, 2008, s. 120).

Migracje Polaków wpływają niekorzystnie na stabilność finansową systemu ubezpieczeń społecznych. Wynika to z dysproporcji między liczbą pracujących, którzy płacą składki na ubezpieczenia społeczne, a liczbą osób pobierających świadczenia emerytalno-rentowe. W Polsce rodzi się coraz mniej dzieci, co w przyszłości ograniczy rynek pracy. Ponadto w wiek emerytalny wchodzą roczniki z wyżów demograficznych (Markowski, 2008, s. 48–49).

Z kolei migrację zarobkową do Polski cechuje wytworzenie się szarej strefy na rynku pracy. Zjawisko to dotyczy głównie Ukraińców, którzy mimo dostępnych legalnych dróg zatrudnienia wolą funkcjonować w szarej strefie. Niestety brakuje dokładnych danych odnośnie do nielegalnych zagranicznych pracowników w Polsce – ich liczbę szacuje się w przedziale między kilkadziesiąt a kilkaset tysięcy osób (Grzyb, 2008, s. 97).

Najważniejsze zmiany społeczne wywołane migracją zachodzą na gruncie rodziny. Z jednej strony są to pozytywne efekty, jak poprawa sytuacji materialnej, a co za tym idzie, polepszenie sytuacji osobistej i rodzinnej, większe możliwości realizacji planów na przyszłość, zdobycie nowych umiejętności, kształtowanie aspiracji. Generalnie każde państwo prowadzi swoją politykę migracyjną, która musi być reakcją na zachodzące procesy migracyjne, być rezultatem badań z perspektywy polityki publicznej (Chałupczak, 2013, s. 78). Koszty migracji często jednak przewyższają zyski. Pojawiają się problemy związane z wielokulturowością, ograniczeniem starych tradycji i zwyczajów oraz wprowadzaniem tych tradycyjnych dla innych państw i narodów (Puzio-Wacławik, 2010, s. 88–89).

Podsumowanie

Polska jest krajem imigracyjnym, a po 2016 roku saldo migracji jest dodatnie. Co pewien czas w naszym kraju dochodziło do masowych wyjazdów, głównie o podłożu ekonomicznym. Fale tych wyjazdów miały i mają wpływ na rozwój państwa. Podjęta w artykule kwestia krótkotrwałej migracji zarobkowej pokazuje, że zjawisko to sięga powyżej 2 mln Polaków w skali roku. Towarzyszą temu rodzące się pytania dotyczące przyszłego rozwoju naszej gospodarki oraz rosnących problemów społecznych, np. starzenia się społeczeństwa, którego część w połowie lat czterdziestych XXI wieku będzie w wieku poprodukcyjnym. Społeczne skutki migracji Polaków są trudniejsze w ocenie niż skutki ekonomiczne. Fakt ten wynika z dużej liczby wyjazdów czasowych w ogólnej liczbie migracji. Co prawda wyjazdy czasowe nie powodują trwałych zmian w strukturze populacji Polski, wpływają jednak na indywidualną sytuację migrantów i funkcjonowanie społeczności wysyłających, do których mniej lub bardziej regularnie migranci powracają. Najbardziej widoczne społeczne konsekwencje migracji dotyczą kultury bytu. Dzięki nowym doświadczeniom zdobytym za granicą, większym możliwościom finansowym i aspiracjom migrantów przejmowane są przez nich wzorce konsumpcyjne państw przyjmujących (tj. wzorce kultury masowej), tamtejsze formy spędzania wolnego czasu czy nowe źródła ułatwiające poprawę życia. Zwiększona konsumpcja często odgrywa istotną rolę w określeniu pozycji w lokalnej społeczności i zwiększeniu prestiżu. Drugim zjawiskiem jest ewolucja samej migracji – od emigracji krótkookresowej do długookresowej (w tym rezydenci), staranie się o obywatelstwo w innych państwach. Ze względów społecznych istotnym problemem stało się eurosieroctwo, dotyczące młodego pokolenia Polaków, gdyż w wielu wypadkach wyjazdy czasowe dotyczą nie jednego, ale dwojga rodziców. Podejmowane działania związane są z emigracją całych rodzin, poszukiwaniem lepszych warunków do życia w innych państwach, na terenie np. UE.

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Zawiadomienie o wejściu w życie Umowy o wystąpieniu Zjednoczonego Królestwa Wielkiej Brytanii i Irlandii Północnej z Unii Europejskiej i Europejskiej Wspólnoty Energii Atomowej. Dz. Urz. UE L 29 z 31 stycznia 2020 r.

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