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كما تنفتح على نشر الأبحاث العلمية الجادة في مجالات العلوم الاجتماعية والانسانية

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○ لا تفرض المجلة قيودا صارمة على العدد الأقصى من الصفحات الذي لا يجب أن يتجاوزه المقال، لكننا مع ذلك نوصي بشدة بكتابة المقال بإيجاز دون إطناب وحشو.

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The Cultural and Historical Foundations of Modern Intelligence

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Abstract

Intelligence is one of the concepts that has preoccupied human thought, as it is associated with humanity's attempts to understand the mental capacities that distinguish them from other creatures and their use in coexisting with their environment. This study aimed to shed light on the various definitions assigned to intelligence in modern linguistic dictionaries. As language is a mirror that reflects the culture of peoples, the researcher sought to explore the history of the term's emergence and its synonyms in the Arabic language, Islamic history, and the English and French as Latin languages.

To achieve the study's objective, the researcher collected the necessary data from various sources such as dictionaries, books, scientific research, and the internet, and then analyzed it.

The study reached a set of key findings, including:

Based on the definitions found in the three linguistic dictionaries, we can infer the essential elements of intelligence as follows:

- Through the dictionaries in the three languages covered by the study, the term 'intelligence' includes understanding, knowledge, thinking, adaptation, perception, deduction, analysis, discrimination, and synthesis. It also takes previous experiences into account, examines the relationships between facts, considers time as a fundamental factor, and requires the storage of new experiences for use in subsequent ones. The researcher, therefore, formulated a definition for it.
- It is a term deeply rooted in history. The Holy Quran mentioned it with numerous synonyms, while implicitly, it was embodied in the practices of the Prophet Muhammad (peace be upon him) and his companions (may God be pleased with them). The means for its embodiment, namely mathematics and statistics, were also mentioned in the Quran. The Romans also used it from prehistoric times.

Keywords: Arabic language, English language, French language, Intelligence, Linguistic Dictionarie

الذكاء: ثقافات وجذور تاريخية مهدت لظهور المصطلح الحديث

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ملخص

يعتبر الذكاء من بين المفاهيم التي شغلت الفكر الإنساني، إذ ارتبط بمحاولة الإنسان على فهم قدراته العقلية التي تميزه عن باقي الكائنات وتوظيفه للتعايش مع بيئته. هدفت الدراسة إلى التعرف على إلقاء الضوء على مختلف التعاريف التي أسندت للذكاء في المعاجم اللغوية الحديثة، ولما كانت اللغة مرآة تعكس ثقافة الشعوب عمدت الباحثة إلى البحث في تاريخ ظهور المصطلح ومرادفاته في اللغة العربية والتاريخ الإسلامي واللغتين الفرنسية والإنجليزية كلغتين لاتينيتين. ولتحقيق هدف الدراسة قامت الباحثة بجمع البيانات اللازمة عن طريق مصادر مختلفة كالمعاجم والكتب والأبحاث العلمية والانترنت ومن ثم تحليلها. وقد توصلت الدراسة إلى مجموعة من النتائج أبرزها:

- على أساس التعاريف الموجودة في المعاجم اللغوية الثلاث، يمكننا استنتاج العناصر الأساسية للذكاء كما يأتي:
- من خلال المعاجم في اللغات الثلاث التي تناولتها الدراسة؛ يشمل مصطلح الذكاء كلا من الفهم، العلم، التفكير، التكيف، التصور، الإدراك، الاستنتاج، التحليل، التمييز والتركيب، يأخذ بعين الاعتبار التجارب السابقة، يبحث في العلاقات القائمة بين الحقائق، يأخذ الوقت كعامل أساسي، ضرورة تخزين التجربة الجديدة من أجل استعمالها في التجارب اللاحقة. وبالتالي توصلت الباحثة إلى صياغة تعريف له.
- هو مصطلح ضارب في عمق التاريخ، فقد ذكره القرآن الكريم بمرادفات عديدة أما ضمناً فقد تجسد في ممارسات الرسول صلى الله عليه وسلم وأصحابه رضي الله عنهم، كما ذكرت في القرآن كذلك الوسائل التي تعمل على تجسيده وهي الرياضيات والإحصاء، كما استعمله الرومان منذ ما قبل التاريخ.

الكلمات المفتاحية: اللغة العربية، اللغة الانجليزية، اللغة الفرنسية، الذكاء، المعاجم اللغوية

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مقدمة

من خلال الاطلاع على العديد من الدراسات بخصوص الجذور التاريخية للذكاء نجد دراسة (STEPHENS & JUHARI, 2009) التي تؤكد على أن الإنسان قد وظف ذكائه في العديد من المواقف منذ مرحلة ما قبل التاريخ لتحقيق التنافس مستشهدا بالعديد من الأمثلة في مجالات مختلفة العسكري منها والتجاري، وكما تستشهد دراسة (DHAOUI, 2008) بالشبكات التجارية التي كان التجار يتخذونها كوسيلة لإيصال منتوجاتهم عبر الدول.

على هذا الأساس تتشكل لدينا الإشكالية الآتية: كيف يعرف الذكاء في المعاجم اللغوية الحديثة؟ ماهي الجذور التاريخية للمصطلح في كل من اللغة العربية والتاريخ الإسلامي واللغتين الإنجليزية والفرنسية باعتبارهما لغتين لاتينيتين. وعلى إثر هذه الإشكالية يمكن طرح الأسئلة الفرعية الآتية:

- 1- كيف يعرف الذكاء في كل من اللغة العربية، الفرنسية والانجليزية؟ هل تختلف هذه التعريفات من لغة إلى أخرى؟
- 2- كيف يمكننا صياغة تعريف جديد للذكاء بناء على ما سنراه من تعاريف مختلفة؟
- 3- كيف تبنت الحضارات القديمة مصطلح الذكاء أم أنها اقتصرته على مظاهر ووسائل ممارساته؟

أهمية الدراسة

تستمد الدراسة أهميتها من المعطيات الآتية:

1. تكمن أهمية الترجمة في كونها جسراً للتواصل بين الثقافات والشعوب عبر الحواجز اللغوية، مما يدعم تدفق المعلومات، ونشر المعرفة والعلوم، كما أنها تلعب دوراً محورياً في إثراء الأدب والفنون والمكتبات العلمية، وتمكن الأفراد والشركات من التفاعل عالمياً في مجالات متنوعة مثل التجارة والقانون والصحة.
2. نظراً لأهمية المصطلحات في علم الترجمة وارتباطه الوثيق بثقافة الشعوب وتاريخهم بل ويتعداه إلى دينهم الذي يعتنقونه ودياناتهم التي يعتقدون بها جاءت هذه الدراسة لتربط مفهوم الذكاء بمجموعة من الثقافات في حدود ما تمكنت الباحثة الوصول إليه،
3. الانتشار الواسع لمصطلح الذكاء وارتباطه بالعديد من العلوم الحديثة، إذ لم يعد يقتصر على الذكاء البشري فقط بل أصبحنا نتعامل مع نظم ذكية ومنظمات ذكية وذكاء تنافسي واقتصادي مما يعكس أهمية المصطلح.

الدراسات السابقة

فيما يلي بعض الدراسات التي تناولت موضوع الذكاء:

- 1- دراسة (بلاغي، صديقي، ناظري، و مهران، 2025) بعنوان "تعليم اللغة العربية في ضوء نظرية الذكاءات المتعددة لغاردنر الذكاء اللغوي أنموذجاً" تهدف الدراسة إلى إبراز تأثير نظرية الذكاءات المتعددة والذكاء اللغوي أنموذجاً على تعليم اللغة العربية وكيفية تطبيق هذا الذكاء على تعليم العربية بصورة تنفيذية وفعلية. تكمن أهمية البحث في تقديم الحلول لترقية تعليم اللغة العربية وتنميته كلفة ثانية، وفق نظرية علم النفس لغاردنر تحت عنوان الذكاءات المتعددة. يجرى البحث في ضوء المنهج الوصفي. التحليلي والتطبيقي. وتدل النتائج على أنه من الممكن تطبيق الذكاء اللغوي المذكور في نظرية غاردنر على جميع مهارات اللغة الأربع، أي الاستماع، والقراءة، والمحادثة والكتابة، وإجرائه في كل مهارة عبر استخدام التقنيات والحلول الخاصة بنفس المهارة المعنية.

2- دراسة (عالم، 2014) بعنوان "الفروق في الذكاءات المتعددة لدى عينة من تلاميذ وتلميذات السنة الأولى والرابعة من مرحلة التعليم المتوسط" هدفت الدراسة الى الكشف عن بروفيل الذكاءات المتعددة لدى تلاميذ و تلميذات السنة الأولى و الرابعة متوسط. كما سعت الدراسة الى معرفة الفروق في تقديراتهم لأنواع الذكاءات لديهم باختلاف الجنس والمستوى الدراسي. لتحقيق ذلك تم تطبيق مقياس الذكاءات المتعددة لجاردنر بعد مراجعته وتقنيته ثم تطبيقه على عينة الدراسة الاساسية المتكونة من 342 تلميذاً. بينت النتائج أن الذكاءات التي يتمتع بها أفراد العينة حسب تقديراتهم هي: الذكاء الشخصي، الذكاء المنطقي الرياضي، الذكاء الحسي- الحركي، الذكاء المكاني، الذكاء الاجتماعي، الذكاء الطبيعي، الذكاء اللفظي، وأخيراً الذكاء الموسيقي. أما عن الفروق فقد تباينت ما بين أنواع الذكاءات، حيث ظهرت الفروق ما بين الجنسين في الذكاءات المتعددة التالية: الذكاء اللفظي، الذكاء المنطقي الرياضي، الذكاء الطبيعي، الذكاء الموسيقي، الذكاء الحسي-الحركي والذكاء المكاني؛ في حين لم تظهر الفروق ما بين الجنسين في الذكاء الاجتماعي والذكاء الشخصي.

المساهمات التي تعتقد الباحثة تقديمها مقارنة بالدراسات الأخرى

من خلال استعراض الدراسات السابقة للموضوع وإطلاع الباحثة على العديد من الدراسات نجد أنها تناولت الذكاء كمصطلح مرتبط بعلوم أخرى كعلم النفس والتربية لكنها لم تتطرق له كمفهوم مستقل بحد ذاته، وهذه هي المساهمة التي تعتقد الباحثة إضافتها من خلال الدراسة الحالية.

النتائج

اعتمدت الباحثة في دراستها للموضوع على المنهج الوصفي التحليلي من خلال تحليل المفاهيم المتعلقة بالذكاء في اللغات الثلاث محل الدراسة. أما بخصوص مصادر البيانات فقد تم الحصول عليها من عدة مصادر كالمعاجم اللغوية والكتب، والأبحاث العلمية بالإضافة إلى مواقع الانترنت. منذ أن وجد الإنسان على وجه الأرض وهو في تنافس مع من يتقاسمون معه بيئته، لذا فقد وظف ذكاءه للتأقلم معهم بل والبحث عن كيفية التغلب عنهم. يختلف معنى الذكاء من لغة إلى أخرى ومن علم أو مجال إلى آخر، لهذا يجب أن نقف عند معاني الذكاء في بعض اللغات "العربية، الانجليزية والفرنسية"، كيف كانت بداياته الأولى عبر التاريخ؟

الذكاء في اللغات

مفاهيم الذكاء في اللغات: تختلف معاني الذكاء من لغة إلى أخرى في القواميس والمعاجم، لذا عمدت الباحثة إلى التطرق إلى معانيه في كل من اللغة العربية، الفرنسية والانجليزية من أجل اقتراح تعريف للذكاء.

أولاً: الذكاء في اللغة العربية

معاني الذكاء في اللغة العربية: في الجدول الآتي سنتطرق إلى بعض التعريفات التي وردت في المعاجم العربية بخصوص الذكاء:

الجدول 1: تعريفات الذكاء في قواميس اللغة العربية

معجم المعاني الجامع - معجم عربي عربي	<p>ذكاء (اسم): ذكاء مصدر ذكي؛</p> <p>ذكاء (اسم):</p> <p>▲ مصدر ذكا؛</p> <p>▲ ذكاء النار: شدة وهجها؛</p> <p>▲ ذكاء الإنسان: قدرته على الفهم والاستنتاج والتحليل والتمييز بقوة فطرته وذكاء خاطره؛</p> <p>▲ الذكاء: الجمرة الملتببة،</p> <p>▲ الذكاء الاجتماعي: حسن التصرف في المواقف والأوضاع الاجتماعية،</p> <p>▲ ذكاء اصطناعي: قدرة آلة أو جهاز ما على أداء بعض الأنشطة التي تحتاج إلى ذكاء مثل الاستدلال الفعلي والإصلاح الذاتي.</p>
المعجم الوسيط	<p>ذكاء:</p> <p>▲ [ذك و] (مصدر ذكا):</p> <p>▲ ذكاء النار: شدة وهجها؛</p> <p>▲ ذكاء الإنسان: قدرته على الفهم والاستنتاج والتحليل والتمييز.</p>
المعجم: الغني	<p>▲ ذكاء:</p> <p>▲ مصدر ذكا وذكو وذي؛</p> <p>▲ جمرة ملتببة؛</p> <p>▲ (علوم النفس) قدرة على التحليل، والتركيب، والتمييز والاختيار والتكيف إزاء المواقف المختلفة - ذكاء المرء محسوب عليه؛</p> <p>▲ الذكاء الاجتماعي: (علوم الاجتماع) حسن التصرف في المواقف والأوضاع الاجتماعية؛</p> <p>▲ ذكاء اصطناعي: (الحاسبات والمعلومات) قدرة آلة أو جهاز ما على أداء بعض الأنشطة التي تحتاج إلى ذكاء مثل الاستدلال الفعلي والإصلاح الذاتي.</p>
المعجم: اللغة العربية المعاصر	<p>ذكاء:</p> <p>1- مصدر ذكا وذي وذكو. 2- حدة العقل. 3- سرعة الفطنة والفهم.</p>
المعجم: عربي عامة	<p>▲ الذكاء: لهب النار؛</p> <p>▲ والذكاء الجمرة الملتببة؛</p> <p>▲ والذكاء قدرة على التحليل والتركيب والتمييز والاختيار، وعلى التكيف إزاء المواقف المختلفة.</p>

المصدر: من إعداد الباحثة استنادا إلى (معجم المعاني الجامع - معجم عربي عربي، بلا تاريخ)

1- في اللغة الفرنسية: في الجدول الآتي سنتطرق إلى بعض من تعاريف الذكاء التي جاءت في معاجم اللغة الفرنسية:

الجدول 2: تعريفات الذكاء في قواميس اللغة الفرنسية

Dictionnaire Larousse (intelligence, s.d.)	<p>الذكاء (باللاتينية intelligentia، من intelligere، connaître).</p> <p>▲ مجموع السلوكيات الذهنية الهادفة إلى المعرفة المفاهيمية والمنطقية؛</p> <p>▲ قدرة الفرد على التكيف مع حالة معينة، اختيار وسيلة التصرف بالنظر إلى الظروف؛</p> <p>▲ الشخص الذي يُظهر في مجال معين اهتمامه بالفهم، العلم وتكييف سلوكه بسهولة لبلوغ الأغراض النهائية؛</p> <p>▲ القدرة على إدراك الشيء عن طريق التفكير.</p>
8e édition (1932-1935) du Dictionnaire de l'Académie française (intelligence définitions, 1996)	<p>القدرة على فهم وليس سوء فهم معنى الكلمات، وطبيعة الأشياء، وأهمية الحقائق.</p>
9e édition (1992-...) du Dictionnaire de l'Académie française (intelligence définitions, 1996)	<p>▲ القرن الثاني عشر: مشتقة من الكلمة اللاتينية intellegentia، بمعنى "العمل من أجل تمييز، فهم".</p> <p>I. جميع الإمكانيات الفكرية؛</p> <p>القدرة على الفهم، التصور، المعرفة، بما في ذلك القدرة على التمييز أو إقامة علاقات بين الحقائق والأفكار أو الأشكال للوصول إلى المعرفة.....</p> <p>▲ بشكل موسع: أن يظهر القدرة على تكيف مع سلوكه إلى حالة جديدة، البراعة التي نظهرها في حالة معينة، مهارة اختيار الوسائل المستخدمة لتحقيق نتيجة معينة.....</p> <p>▲ المعرفة المعمقة، الفهم الواضح والسهل الذي نملكه تجاه شيء ما.</p> <p>II- انسجام بين شخصين أو أكثر.</p>

المصدر: من إعداد الباحثة بالاعتماد على عدة مصادر

ثانيا: الذكاء في اللغة الانجليزية

في الجدول الآتي سنتطرق إلى بعض من تعاريف الذكاء التي جاءت في معاجم اللغة الانجليزية:

الجدول 3: تعريفات الذكاء في قواميس اللغة الانجليزية

All Words Dictionary, 2006	القدرة على استخدام الذاكرة، المعرفة، الخبرة، الفهم، المنطق، الخيال، والحكم من أجل حل المشاكل والتكيف مع الأوضاع الجديدة.
The American Heritage Dictionary fourth edition, 2000	القدرة على اكتساب وتطبيق المعرفة.
American Psychological Association	يختلف الأفراد عن بعضهم البعض في قدرتهم على فهم الأفكار المعقدة، التكيف بفعالية مع البيئة، التعلم من التجربة، المشاركة في مختلف أشكال الاستدلال، التغلب على العقبات بالتفكير.
Cambridge Advance Learner's Dictionary, 2006	القدرة على التعلم، الفهم وإصدار الأحكام أو امتلاك الآراء المبنية على المنطق.
Encarta World English Dictionary, 2006	القدرة على التعرف على الحقائق والمهارات وتطبيقها، لا سيما عندما تكون هذه القدرة هي متطورة جداً.
Encyclopedia Britannica, 2006	القدرة على التكيف الفعال مع البيئة، إما عن طريق تغيير الذات أو عن طريق تغيير البيئة أو إيجاد بيئة جديدة ... الذكاء ليس عملية عقلية واحدة، بل هو مزيج من العديد من العمليات العقلية الموجهة نحو التكيف الفعال مع البيئة.
Random House Unabridged Dictionary, 2006	القدرة على التعلم، التفكير المنطقي، الفهم، وأشكال مماثلة من النشاط العقلي؛ الجدارة في استيعاب الحقائق، العلاقات، الوقائع والمعاني إلى غير ذلك.
Longman Dictionary or Contemporary English, 2006	القدرة على التعلم، الفهم، والتفكير في الأشياء.
Merriam-Webster Online Dictionary, 2006	القدرة على معرفة أو فهم أو التعامل مع حالات جديدة أو الصعبة: ... استخدام المنطق بمهارة: القدرة على تطبيق المعرفة للتعامل مع البيئة الخاصة أو التفكير المجرد المقاس بمعايير الأهداف (استعمال تحقيق الأهداف كاختبارات)
Compact Oxford English Dictionary, 2006	القدرة على اكتساب وتطبيق المعرفة والمهارات.
Word Central Student Dictionary, 2006	"القدرة على تعلم وفهم أو التعامل مع المشاكل.

المصدر: من إعداد الباحثة استنادا إلى (Legg & Hutter, 2007)

من خلال استعراض تعريفات الذكاء في اللغات الثلاثة نلاحظ أن التعريفات التي قدمت له تختلف من لغة إلى أخرى. ففي اللغة العربية يتوقف معناه على الاسم المنسوب إليه، فإذا نسب إلى مصدر حراري فيدل على قوة المصدر وشدة (الشمس، الجمر، النار)، أما إذا كان منسوباً للإنسان فيدل على الفهم، الاستنتاج، التحليل، التركيب، الاختيار، التكيف مع المواقف التمييز بقوة الفطرة، حدة العقل، سرعة الفطنة.

أما في اللغة الفرنسية فيتم تعريفه انطلاقاً من أصله اللاتيني وهو المعرفة التي تشتمل على كل من الفهم، العلم، التكيف، التصور، الإدراك، التمييز بالإضافة إلى مهارة اختيار الوسيلة لتحقيق النتيجة. كما نلاحظ أن "9e édition (1992-...) du Dictionnaire de l'Académie française (intelligence définitions, 1996) قد توسع في المفهوم حيث تطرق لإقامة العلاقات بين الحقائق والأفكار والأشكال للوصول إلى المعرفة (مفهوم الشبكات) وهو العنصر الذي لم نجده في اللغة العربية. وفي اللغة الانجليزية نجد كذلك كلا من المعرفة، الفهم، التعلم، التفكير، التكيف.... التي وجدناها في اللغتين السابقتين إلا أنها تضيف مفهومين جديدين هما "الذاكرة والتعلم من التجارب السابقة" والذي يذل على أهمية تخزين المعلومات من أجل استخدامها في المواقف اللاحقة.

الذكاء في التاريخ

وبما أنه لا يمكننا بأي حال من الأحوال التصفح في علم الترجمة دون التطرق إلى ثقافة الشعوب الناطقة بها، فلابد لنا من التطرق إلى مصطلح الذكاء في التاريخ، كما تجدر الإشارة إلى أننا سنركز على الذكاء في التاريخ الإسلامي، نظراً لندرة المراجع التي تناولته في اللغة العربية والتاريخ الإسلامي الذي يعتمد على اللغة السابقة الذكر. فيما يخص ذكره واستعماله عبر التاريخ، فيعود أصل كلمة الذكاء إلى ما قبل الميلاد حين استعمل الفيلسوف الروماني "ماركوس توليوس" كلمة لاتينية "Intelligentia" وقصد بها النشاط الفكري والمعرفي الذي يدل على الذكاء، وفقاً لما جاء في موقع "اقرأ عن" في صفحة: (تعريف الذكاء ماهو الذكاء مفهوم الذكاء، بلا تاريخ). أما في التاريخ العربي الإسلامي فنجد مجسداً بصور مختلفة وذكر في القرآن بمرادفات عديدة بالإضافة إلى مجموعة من ممارسات من طرف الرسول صلى الله عليه وسلم وأصحابه رضي الله عنهم، كما نجد ذكر الوسائل التي تعمل على تجسيده. فبالنسبة لمرادفات الذكاء في القرآن الكريم، يقول ابن خلدون أن الله تعالى قد ذكر كلمة التفكير للدلالة على الذكاء: "إن الإنسان يشترك مع الحيوانات في امتلاكهما للحواس، فهو يتغذى ويتحرك مثلهم، كما يحتاج كل منهما إلى المأوى إلى آخره. ويتميز عنهم بالتفكير، وهي الحاسة التي تقوده لإيجاد وسائل العيش، كما تقوده للمنافسة مع من هم حوله. وكذلك إلى الحياة الاجتماعية" (Ibn Khaldoun, 1863, p. 322).

كما يضيف ابن خلدون: أن أصل نشأة العلوم هو التفكير (Ibn Khaldoun, 1863, p. 322).

ثم يشير إلى أن التفكير هو الذكاء وأن الذكاء درجات:

في الدرجة الأولى: نجد الذكاء المميز (هذا النوع من التفكير يتكون من مفهوم أو فكرة بسيطة)، ويشمل ذكاء الأشياء الخارجية التي تطهر في ترتيب طبيعي أو تبادلي، بطريقة يستطيع الإنسان الوصول للنتيجة التي يريدها بواسطة قوته. بمساعدة هذا النوع من الذكاء يستطيع الشخص أن يميز الأشياء المفيدة له كالغذاء وأن يتجنب ما هو ضار له. في الدرجة الثانية: الذكاء التجريبي هذا النوع من الذكاء يعلم الآراء الواردة وقواعد المعالجة التي يجب على الشخص أن يلاحظها في تعاملاته وفي الحكم على الكائنات من جنسه، والتي في جزء كبير منها تتكون من تأكيدات (أو اقتراحات) أين تظهر الحقيقة بشكل تدريجي عن طريق التجربة.

في الدرجة الثالثة: الذكاء التأملي، في هذه الدرجة التفكير يكشف المعرفة الحقيقية أو المفترضة الخاصة بالأشياء والتي تبحث عنها وراء المعاني التي لا تظهر بصفة مباشرة. فهي تنطوي على مفاهيم وتأكيدات، مترابطة بطريقة معينة، وفقاً لشروط

خاصة، ينتج عنها مفاهيم وتأكيدات أخرى. وبالربط بين هذه المعارف مع أخرى، تنتج معرف جديدة. وكنتيجة أخيرة تتشكل صورة واضحة للأمور القائمة وفقا لأنواعها، وأصنافها وأسبابها الفرعية والثانوية. وكذلك عن طريق التفكير.

أما في دراسة (نجده، 2015) فقد أحصى للذكاء ثلاثين مرادفا في التراث الإسلامي من حيث القرآن والسنة والعلماء المسلمين وهي: القلب، الكياسة، النهى، الفطنة، الذهن، الفراسة، الحجا، الحجر، الحذق، اللقانة، الحلم، اللوذية، البصيرة، الألمعية، التدبر، اللب، الإرب، الحصافة، النظر، التذكر، الذكر، التفكير، البديهة، الفؤاد، النبيل، النقاب، التحرير، الحذق والحدس. إلا أننا ومن خلال التمعن في هذه الدراسة نجد أن مصطلح الحذق قد تكرر مرتين ما يعني أن الباحث قد أورد تسعا وعشرين مرادفا بدلا من ثلاثين.

وكممارسات من طرف الرسول صلى الله عليه وسلم وأصحابه فلعن من أهم الأمثلة وأبرزها التي يمكننا الاستشهاد بها هي جمع القرآن. ففي عهد النبي محمد صلى الله عليه وسلم، كان القرآن محفوظا في الصدور ومكتوبا في الرقاع¹ واللخاف² والعسب³ والأكتاف، لكنه مفرقا ولم يكن مرتبا في مصحف واحد (جمع القرآن، 2017).

ظل القرآن الكريم على هذه الحال مفرقا غير مجموع في مصحف واحد، إلى أن كانت خلافة أبي بكر، فواجهته أحداث جسيمة، وقامت حروب الردة، واستحرّ القتل بالقراء في وقعة اليمامة - سنة اثنتي عشرة للهجرة - التي استشهد فيها سبعون قارئاً من حفاظ القرآن. هال ذلك عمر بن الخطاب، وخاف أن يضيع شيء من القرآن بموت حفظته، فدخل على أبي بكر، وأشار عليه بجمع القرآن وكتابته خشية الضياع، فنفر أبو بكر من مقالته، وكَبَّرَ عليه أن يفعل ما لم يفعله النبي، فظل عمر يراوده حتى اطمئن أبو بكر لهذا الأمر. ثم كلف أبو بكر زيد بن ثابت بتتبع الوحي وجمعه، فجمعه زيد من الرقاع والعسب واللخاف وصدور الرجال. حرص زيد بن ثابت على التثبت مما جمعه، ولم يكتف بالحفظ دون الكتابة، وحرص على المطابقة بين ما هو محفوظ ومكتوب، وعلى أن الآية من المصدرين جميعاً. فكان ذلك، أول جمع للقرآن بين دفتين في مصحف واحد. واحتفظ أبو بكر بالمصحف المجموع حتى وفاته، ثم أصبح عند حفصة بنت عمر. (جمع القرآن، 2017)

أما بالنسبة للوسائل التي جاءت في القرآن فنجد الإحصاء والرياضيات، التي تعتبر من أهم الوسائل التي نستعملها اليوم في البرامج الذكية، إذ أرشدنا القرآن إلى استعمالها في العديد من السور، كما نجد مفهوم القدوة أو الأسوة التي ذكرت في العديد من المواقف.

فبالنسبة للإحصاء فقد ذكره الله تعالى في العديد من الآيات التي نذكر منها ما جاءت به دراسة (عمراني، 2011) (مع ترتيب الآيات بحسب ترتيب السور التي وردت فيها):

1- الآية 34 من سورة إبراهيم في قوله تعالى: "وَأَتَاكُمْ مِنْ كُلِّ مَا سَأَلْتُمُوهُ وَإِنْ تَعُدُّوا نِعْمَتَ اللَّهِ لَا تَحْصُوهَا إِنَّ الْإِنْسَانَ لَظَلُومٌ كَفَّارٌ"؛

2- الآية 18 من سورة الكهف في قوله تعالى: "ثُمَّ بَعَثْنَا لَهُمْ لِنَعْلَمَ أَيُّ الْجَزْبَيْنِ أَحْصَىٰ لِمَا لَبِثُوا أَمَدًا"؛

3- الآية 94 من سورة مريم في قوله تعالى: "لَقَدْ أَحْصَاهُمْ وَعَدَّهُمْ عَدًّا"؛

4- الآية 12 من سورة يس في قوله تعالى: "إِنَّا نَحْنُ نُحْيِي الْمَوْتَىٰ وَنَكْتُبُ مَا قَدَّمُوا وَآثَارَهُمْ وَكُلُّ شَيْءٍ أَحْصَيْنَاهُ فِي إِمَامٍ مُبِينٍ"؛

5- الآية 6 من سورة المجادلة في قوله تعالى: "يَوْمَ يَبْعَثُهُمُ اللَّهُ جَمِيعًا فَيُنَبِّئُهُم بِمَا عَمِلُوا أَحْصَاهُ اللَّهُ وَنَسُوهُ وَاللَّهُ عَلَىٰ كُلِّ شَيْءٍ شَهِيدٌ"؛

- 6- الآية 1 من سورة الطلاق في قوله تعالى: "...وَأَحْصُوا الْعِدَّةَ سَوَاءً تَقُوا اللَّهَ وَرَبَّكُمْ...";
- 7- الآية 28 من سورة الجن في قوله تعالى: "... وَأَحْصَى كُلُّ شَيْءٍ عَدَدًا";
- 8- الآية 20 من سورة المزمل في قوله تعالى: "... وَاللَّهُ يُقَدِّرُ اللَّيْلَ وَالنَّهَارَ عِلْمَ أَنْ لَنْ تُحْصُوهُ فَتَابَ عَلَيْكُمْ...";
- 9- الآية 29 من سورة النبا في قوله تعالى: "...وَكُلُّ شَيْءٍ أَحْصَيْنَاهُ كِتَابًا".

كما نجد أن الإحصاء قد طُبق في عهد النبي فقد روى البخاري ومسلم عن حذيفة بن اليمان رضي الله عنه قال: كنا مع رسول الله فقال: "أحصوا لي كم يلفظ بالإسلام". وفي رواية للبخاري أنه قال: "اكتبوا لي من يلفظ بالإسلام من الناس". قال حذيفة: فكتبنا له ألفا وخمسمائة رجل. وكان ذلك ليعرف الرسول صلى الله عليه وسلم القوة البشرية الضاربة التي يستطيع بها مواجهة الأعداء (الرياضيات والإسلام).

كما طبق المسلمون في زمن الخليفة عمر بن الخطاب رضي الله عنه الإحصاء عن طريق تأسيس الدواوين حيث يتم فيها تدوين المعلومات عن الجند ودخول بيت المال وغيرها من البيانات اللازمة للتموين وتجهيز الجيوش. (الرياضيات والإسلام)

كذلك استخدم الخليفة أبو جعفر المنصور وسائل متطورة وعديدة لتسليح وتموين الجند إضافة إلى تبويب مدخولات بيت المال والمصروفات والأبواب الأخرى المتعلقة بإدارة الدولة. (الرياضيات والإسلام)

أما بالنسبة للرياضيات، فنجدها حاضرة في العديد من الآيات سواء من حيث: النظام العددي والعد، الأعداد الترتيبية، الزمر والزمرة الثانوية، الأحد والواحد كمجموعة خالية، ترقيم الأيام المعلومة، العد والعادين، ضرورة الحساب، الزمن والتاريخ، العمليات الحسابية: الجمع والطرح والقسمة، المقارنة، التفاضل بالدرجات، النسبة، الجبر والمقابلة، التحويل بين التقويم القمري والشمسي، أشهر النسيء، نسبة الزمن، الكسور، وهذا بحسب دراسة (عبد الرضا، 2011)، وتعتبر الدراسة الأساليب الإحصائية من ضمن الوسائل الرياضية.

كما نجد مفهوما هاما من ضمن المفاهيم التي تجسد أهمية الذكاء في الإسلام وهي "القدوة"، فالقدوة كما يعرفها النحلاوي: "إحداث تغيير في سلوك الفرد في الاتجاه المرغوب فيه، عن طريق القدوة الصالحة؛ وذلك بأن يتخذ شخصا أو أكثر يتحقق فيهم الصلاح؛ ليتشبه به، ويصبح ما يطلب من السلوك المثالي أمرا واقعا ممكنا التطبيق". (الرويلي، 2012)، حيث أمرنا الله تعالى في قرآنه الكريم بالتأسي بالرسول صلى الله عليه وسلم في قوله تعالى في الآية 21 من سورة الأحزاب: "لَقَدْ كَانَ لَكُمْ فِي رَسُولِ اللَّهِ أُسْوَةٌ حَسَنَةٌ لِمَن كَانَ يَرْجُو اللَّهَ وَالْيَوْمَ الْآخِرَ وَذَكَرَ اللَّهَ كَثِيرًا"، وبالأنباء وهذا في الآية 90 من سورة الأنعام في قوله تعالى: "أُولَئِكَ الَّذِينَ هَدَى اللَّهُ فِيمُدَاهُمُ افْتَدَاهُ" إذ تأتي هذه الآية كما ذكر (الرويلي، 2012) بعد أن ذكر الله ثمانية عشر نبيا، كما يقول الله تعالى في الآية 74 من سورة الفرقان: "وَالَّذِينَ يَقُولُونَ رَبَّنَا هَبْ لَنَا مِنْ أَزْوَاجِنَا وَذُرِّيَّاتِنَا قُرَّةَ أَعْيُنٍ وَاجْعَلْنَا لِلْمُتَّقِينَ إِمَامًا" ففي هذه الآية يريد الله - عز وجل - من المسلمين التطُّع للأفضل وإلى أعلى المقامات، وانظر لم يقل - سبحانه -: واجعلنا في المتقين، ولكننا تربية للمؤمنين على الهمة العالية، وأن يكونوا مثل إبراهيم - عليه السلام - يطلب إمامة المتقين؛ إذ يقول شيخ الإسلام: أي: فاجعلنا أئمة لمن يقتدي بنا ويأتمُّ، ولا تجعلنا فتنة لمن يضلُّ بنا ويشقى" (الرويلي، 2012).

إذا من خلال الآيات الواردة في مفهوم القدوة فإن الله يريد من عباده البحث والتدبر في سيرة الرسول الكريم والأنبياء عليهم السلام -باعتبارها نماذج ناجحة- من أجل أن نطبقها في حياتنا اليومية، وهو ما يمكننا تسميته بـ "محاكاة النماذج الناجحة" وهو دلالة على أن الله تعالى يطلب منا العيش بذكاء بناء على نماذج سابقة في ظل الظروف الراهنة، أو بما يتوافق ومعطيات

بيئتنا، أما في الآية الثالثة فإن الله تعالى يطلب منا أن نكون نحن بأخلاقنا وانجازاتنا قدوة لمن بعدنا. كما يقول (السعدي) في تفسير هذه الآية: "أي: أوصلنا يا ربنا إلى هذه الدرجة العالية، درجة الصّديقين والكمّل من عباد الله الصالحين، وهي درجة الإمامة في الدين، وأن يكونوا قدوة للمتّقين في أقوالهم وأفعالهم، يُقتدى بأفعالهم، ويُطمأنُّ لأقوالهم، ويسير أهل الخير خلفهم، فهمدون ويهتدون.

مناقشة النتائج

- من خلال ما جاء من المفاهيم والتعاريف الخاصة بالذكاء، يمكننا استنتاج ما يلي:
- على أساس التعاريف الموجودة في المعاجم اللغوية الثلاث، يمكننا استنتاج العناصر الأساسية للذكاء كما يأتي:
- يشمل مصطلح الذكاء كلا من الفهم، العلم، التفكير، التكيف، التصور، الإدراك، الاستنتاج، التحليل، التمييز والتركيب؛
- يأخذ بعين الاعتبار التجارب السابقة؛
- يبحث في العلاقات القائمة بين الحقائق؛
- يأخذ الوقت كعامل أساسي؛
- ضرورة تخزين التجربة الجديدة من أجل استعمالها في التجارب اللاحقة.
- وبالتالي تعرف الباحثة مصطلح الذكاء على أنه: "التصرف المبني على الفهم، العلم، التفكير، التكيف، التصور، الإدراك، الاستنتاج، التحليل، التمييز والتركيب، مع الأخذ بعين الاعتبار التجارب السابقة والبحث في العلاقات القائمة بين الحقائق لحل مشكلة ما في وقت مناسب مع ضرورة تخزين التجربة الجديدة لاستعمالها في التجارب اللاحقة".
- هو مصطلح ضارب في عمق التاريخ، فقد ذكره القرآن الكريم بمرادفات عديدة أما ضمناً فقد تجسد في ممارسات الرسول صلى الله عليه وسلم وأصحابه رضي الله عنهم، كما ذكرت في القرآن كذلك الوسائل التي تعمل على تجسيده وهي الرياضيات والإحصاء، كما استعمله الرومان منذ ما قبل التاريخ.

الخاتمة

يعتبر الذكاء من بين المفاهيم التي شغلت الفكر الإنساني، إذ ارتبط بمحاولة الإنسان على فهم قدراته العقلية التي تميزه عن باقي الكائنات وتوظيفه للتعايش مع بيئته. هدفت الدراسة إلى التعرف على إلقاء الضوء على مختلف التعاريف التي أسندت للذكاء في المعاجم اللغوية الحديثة، ولما كانت اللغة مرآة تعكس ثقافة الشعوب عمدت الباحثة إلى البحث في تاريخ ظهور المصطلح ومرادفاته في اللغة العربية والتاريخ الإسلامي واللغتين الفرنسية والإنجليزية كلغتين لاتينيتين. ولتحقيق هدف الدراسة قامت الباحثة بجمع البيانات اللازمة عن طريق مصادر مختلفة كالمعاجم والكتب والأبحاث العلمية والانترنت ومن ثم تحليلها.

وقد توصلت الدراسة إلى مجموعة من النتائج أبرزها:

على أساس التعاريف الموجودة في المعاجم اللغوية الثلاث، يمكننا استنتاج العناصر الأساسية للذكاء كما يأتي:

- من خلال المعاجم في اللغات الثلاث التي تناولتها الدراسة؛ يشمل مصطلح الذكاء كلا من الفهم، العلم، التفكير، التكيف، التصور، الإدراك، الاستنتاج، التحليل، التمييز والتركيب، يأخذ بعين الاعتبار التجارب السابقة، يبحث في العلاقات القائمة بين الحقائق، يأخذ الوقت كعامل أساسي، ضرورة تخزين التجربة الجديدة من أجل استعمالها في التجارب اللاحقة. وبالتالي توصلت الباحثة إلى صياغة تعريف له.
 - هو مصطلح ضارب في عمق التاريخ، فقد ذكره القرآن الكريم بمرادفات عديدة أما ضمناً فقد تجسد في ممارسات الرسول صلى الله عليه وسلم وأصحابه رضي الله عنهم، كما ذكرت في القرآن كذلك الوسائل التي تعمل على تجسيده وهي الرياضيات والإحصاء، كما استعمله الرومان منذ ما قبل التاريخ.
- توصيات الدراسة: في ظل النتائج المتوصل إليها في هذه الدراسة يمكننا تقديم التوصيات الآتية:
- ضرورة اهتمام الباحثين بالمفاهيم الجديدة دون إهمال جذورها التاريخية للمفاهيم وربط اللغة بثقافة الشعوب؛
 - ضرورة اهتمام الباحثين وخاصة المهتمين باللغة العربية بهدف إثراء هذه اللغة.
- آفاق الدراسة: ترى الباحثة وجود العديد من المواضيع التي يمكن للباحثين معالجتها مثل:
- دراسات معمقة حول الذكاء كمصطلح مستقل بحد ذاته أو مرتبط بمختلف العلوم كعلوم التربية والذكاء الاصطناعي، الذكاء التنافسي والاقتصادي إلى غيرها من العلوم التي تتبناها؛
 - إجراء دراسات مقارنة بين اللغات التي لم تتطرق لها الباحثة لتسهيل أبحاث الترجمة في مختلف اللغات.

بيان الإفصاح

لم تُبلغ المؤلفة عن أي تضارب محتمل في المصالح.

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Beyond Words: Towards a Multimodal Model of Subtitle Analysis

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Abstract

The present article highlights the importance of adopting a multimodal approach to subtitle analysis in audiovisual translation (AVT) research. While existing studies have predominantly focused on verbal and textual dimensions, they have often underestimated the relevance of the interaction between linguistic, visual, and acoustic modes in audiovisual texts. To address this gap, the study adopts a multimodal perspective that conceptualizes subtitling as the outcome of meaning-making processes unfolding across multiple semiotic channels. In this regard, a subtitled excerpt from Hicham Ayouch's 2021 comedy film *Abdelinho* was analyzed by using a modified version of Taylor's (2016) multimodal transcription model (MT). The findings reveal that subtitling decisions are not shaped by language alone but are also influenced by multimodal and cinematic cues, resulting in shifts, omissions, or compensations across semiotic modes.

Keywords: Multimodal Analysis, Subtitle Analysis, Taylor's Multimodal Transcription Model, Audiovisual Translation (AVT)

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Introduction

It is undeniable that an individual living in the 21st century must spend a considerable amount of their time using screens for a multitude of purposes: education, business, entertainment, etc. It is even enough to reach for one's pocket to have a virtual world under the command of one's touch. This increasing screen time, in the context of a globalised interconnected world, has led to an increase in the demand for the dissemination of audiovisual content across global borders. In this context, audiovisual translation (AVT), a field of inquiry within translation studies (TS) that explores the transfer of audiovisual texts across semiospheres, has finally been recognized as one of its most dynamic branches following years of being sidelined and even dismissed by many TS scholars.

One may marvel at such a troubled genesis, given the significant position it now holds in TS and the successful and dynamic synergies it has achieved with other disciplines such as film studies, semiotics, and multimedia studies. The interaction with these disciplines, especially the latter, has been inevitable for AVT since the object of its study is audiovisual texts that combine different semiotic modes and channels to deliver their messages to audiences. Yet, AVT research, particularly on subtitling, has been mostly monomodal, an issue that still hinders this area within TS from exploring other avenues and points of view (Gambier, 2023).

In this respect, the present paper aims at exploring past attempts to include multimodality in AVT, raising the question of how a process-oriented multimodal model can be developed to deconstruct subtitled samples and account for translation choices under spatio-temporal constraints in films. Due to their semiotic complexity, this genre of audiovisual texts tends to be difficult to analyse from a multimodal perspective. In this vein, not only do subtitlers have to effectively translate spoken dialogue in the film, but they also have to translate the cinematic language, an element that is rooted in paralinguistic features and artistic visions while adhering to the spatio-temporal constraints of subtitling.

1. The Multimodality of Subtitling

1.1 The Semiotics of Translation

The process of translation can never be straightforward, as the translator has to carefully manoeuvre the intricacies of different sign systems in order to deliver the same message in the TL. When viewed in such light, the task of the translator is to dig through layers of contextual peculiarities in order to arrive at the universal essence of the source material and adequately transport it to its destination. This interpretive journey back and forth, constantly undertaken by translators between source and target, has prompted semioticians to consider translation as one of the manifestations of semiosis.

Petrilli (2014) defines semiosis as the process of meaning-making through translating signs by virtue of other signs. She explains her viewpoint in more detail by stating that meaning:

is identified in the 'interpretant', in another sign that takes the place of the preceding sign. The interpretant, as a sign, subsists uniquely by virtue of another interpretant and so forth, in an open chain of deferrals. This movement represents semiosis as an open process dependent on the potential creativity of the interpretant in the dialectic-dialogic relation with the interpretive 'habit convention', or 'encyclopaedia' of a given social community. (Petrilli, 2014, p.5).

Put differently, meaning might be understood as the end product of an ongoing process of translating signs via reference to other signs. A dictionary, for example, uses other words—which are also signs referring to items in one's mental repertoire—to describe a word, itself a sign.

One cannot discuss semiosis, with all of its intricacies, without discussing the semiosphere, a concept developed by Juri Lotman (1922-1993). In his influential essay *On the Semiosphere* (1984), Lotman defines the semiosphere as this abstract web of sign systems, functioning as a continuum, outside of which semiosis cannot exist (Lotman, 1984, p. 208). Therefore, the translator's task as a mediator between semiospheres requires them to interpret the source material in order to reformulate the message into the language of the target semiosphere. It is at the level of interpretation, thus, that dialogue between source and target semiospheres takes place.

Based on the view of translation as a manifestation of semiosis, it can be argued that translation "implies encounter with the other, with something else, something different and foreign" (Petrilli, 2023, p.354). It is this delicate mix of otherness and identity that renders translation quite paradoxical, consequently keeping translators preoccupied with learning how to carefully maneuver the intricacies of dialogue with the Other to create something that is simultaneously "similar and dissimilar". In this regard, Petrilli (2023) proposes an approach to translation analysis from a Peircian semiotic perspective built on two aspects of translation that stem from its dialogic nature: iconicity and alterity.

Iconicity, the first factor to be considered in Petrilli's framework, refers to the identity relationship that naturally exists between a source and its target. However, this identity or resemblance cannot be superficial; otherwise, the translation would be a dull replica of the original, lacking any communicative luster within its intended semiosphere. In order to mitigate such a risk, Petrilli (2023) argues that in every translation process, it is essential to distinguish between the 'identification interpretant' and the 'responsive understanding interpretant.' The second comes as a response to engaging with the sign when "the signifier and the signified do not relate to each other on a one-to-one basis," in contrast to the first, where interpretation "is predetermined by codes where the degree of signifying otherness is low." (Petrilli, 2023, p.355).

As for the aspect of alterity in the process of translation, it revolves around "listening to the signs of the other" and transferring them to the target semiosphere, whether this other exists in a different space or time period. As such, the resulting otherized translation becomes on its own the Other for both those in the target semiosphere and for those in the source semiosphere (ibid).

1.2 Subtitling and the Film System

In the late 1990s, Gunther Kress and van Leeuwen established the concept of multimodality in communication, which refers to the total of interactions that initiate and promote semiosis across various semiotic modes within a text in a certain context. For example, a viewer's ability to comprehend and respond to a film's message depends on how well the acting, conversation, soundtrack, and images work together inside the framework of the world the film attempts to build (Kress & van Leeuwen, 2020). As such, it follows that meaning is multimodal by nature and is not language-bound. Although the development of audiovisual content caused a surge in attention to this communication aspect within academic circles, the existence of multimodality as a phenomenon significantly predates the introduction of such content (Taylor, 2016).

Given that films "are texts of great semiotic complexity in which different sign systems cooperate to create a coherent story", they may be among the most well-known and extensively researched epitomes of multimodality (Díaz-Cintas & Remael, 2014, p. 45). Subtitles naturally become an essential component of this semiosystem after these films are translated into other languages. As a result, for semiotic cohesion to be achieved, they must engage with other modes within the semiosystem, namely the audiovisual modes. The complexity of this system is only increased by cultural and ideological considerations, which must be taken into account while translating a film (Díaz-Cintas & Remael, 2014, p. 46).

Being the most common AVT mode in the world of digital media, subtitling can be defined as the process of making an intersemiotic switch from one communication mode (speaking) to another (writing) and from one language to another, all in tandem with the audio and visual channels that constitute the source text (Díaz-Cintas, 2020). As a result, it is often perceived as a constrained form of audiovisual translation where the translator is required to stick to specific guidelines imposed by the inherent semiotic complexities of the ST and TT. It also requires mindful attention to spatial constraints, for the invisibility of subtitles is one of the established outcomes to be strived for. This is why they ought to be positioned primarily at the bottom of the screen because "by their very nature, subtitles interfere with the image and the extent of this interference depends largely on their aesthetic credentials, especially the chosen font type, size and color". (Díaz-Cintas, 2020, p.153).

Syncing the subtitles with on-screen images presents another challenge for subtitlers. To achieve this synchronicity, they are required to master spotting, "a technique that involves

“figuring out the precise moment when a subtitle should appear on screen and when it should disappear, according to a series of temporal and visual considerations” (Diaz-Cintas, 2020, p.154). However, with the advent of AI and its use in subtitling, recent versions of subtitling software can assist in the spotting process. Other variables, such as the viewers' reading speed, also affect how long a subtitle must be displayed on screen. This can be difficult to determine, particularly when the target population is diverse. For this reason, the industry standard has been to display subtitles for no more than six seconds at a time.

It should come as no surprise, then, that the most prevalent translation techniques in subtitling are omission and condensation, given the aforementioned restrictions. In this regard, Diaz-Cintas (2020) states that the goal behind the use of such techniques is to "capture the essence of what is said while making sure that no information of crucial diegetic value is erased" (p.166). For social and cultural considerations, omission is also used, particularly when it comes to swearing and culture-specific references (CSRs). Nonetheless, he reminds professionals to exercise caution when employing this technique, as excessive omission of source material could adversely affect the experience of viewers, particularly those who are conversant in the source language, as they "have direct access to the original source soundtrack and can easily compare" (ibid).

Good subtitles also reflect idiosyncratic linguistic and paralinguistic elements of discourse in a movie. In an effort to set individuals apart in the movie's universe, screenwriters frequently use various linguistic patterns while crafting dialogue. As a result, a subtitler must attempt to retain as much of the uniqueness of speech as possible and appropriately translate it into the target language (TL), taking into consideration body language, pauses, hesitations, and other paralinguistic elements (Taylor, 2016, p.225). Carefully timed subtitles, punctuation, and audio description (AD) can all be tools used to effectively communicate these idiosyncrasies.

1.3 Multimodal Approaches to Subtitle Analysis

While the field of multimodality was developing at a speedy pace, a connection to translation was not on the horizon for most of its pioneers. In this regard, Kress and van Leeuwen (2020) were among the first scholars to devise a multimodal framework for analysis that was later imported into TS and used to analyse translated audiovisual products. In their seminal work *Reading Images: The Grammar of Visual Design*, they developed the tripartite metafunctions of visual grammatical analysis of images, based on Halliday's (1978) metafunctions of language. Despite difficulties in applying it to longer audiovisual texts such as films, some AVT researchers have based their studies on Kress and van Leeuwen's model. One of them is Lu (2023), who adopts this model to investigate the issues of film adaptation and the subtitling of neologisms in the Harry Potter film saga from English into Chinese.

Another approach to multimodal text analysis is the Multimodal Transcription model (MT), developed by Thibault and Baldry (2006). Created to analyse the interplay of different semiotic modes in advertisements, this model breaks down the subject into separate frames and provides minute descriptions of the shifts that occur at the level of visuals, camera movements, and soundtrack, and how semiotic cohesion is maintained throughout the advertisements following those shifts. While Taylor (2013) sees this model as an insightful tool for analysing short videos, he acknowledges its impracticality when it comes to analysing full-length films, which is a gap he fills in his own model of analysis.

Table 1. Summary of MT model

Visual frame	Optic array	Saliency	Soundtrack
Screenshot	Description of the objects in the frame	Description of kinetic action	Description of background noises and dialogue

Note. Reprinted from *Multimodal transcription and text analysis: A multimodal toolkit and coursebook* by A. Baldry and P. Thibault, 2006, p. 229. Copyright 2006 by Equinox.

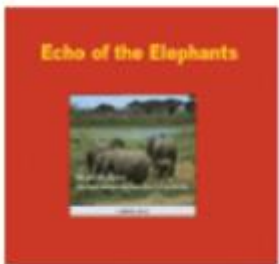
2. Method and tools

In the present section of this article, we attempt to improve upon Taylor's multimodal model for subtitle analysis. Our attempt begins with an assessment of the model to identify the gaps that need to be addressed and to further highlight its usefulness in dissecting the intersemiotic and interlingual dimensions of translation. Furthermore, since the subject of analysis is multimodal, which directly implies its intersemioticity, the relevance of Petrilli's distinction between "identification interpretant" and the "responsive understanding interpretant" and the extent to which it can be included in the final model are also to be examined. The final step is to analyse an extract taken from the Moroccan film, *Abdelinho* (2022), based on the modified version of Taylor's model.

2.1. Assessment of Taylor's model

Inspired by Gregory (2002)'s phasal analysis of literary texts, Taylor (2013) ventures to render the multimodal transcription model (MT) more applicable for films by dividing them into phases instead of frames; each phase comprises different semiotic modes that work in cohesion and share similar themes. This method of analysis allows researchers to "see how (multimodal) texts are constructed, continuously and discontinuously, and thus where to look for patterns at a lexico-grammatical, phonological and semantic level" (Taylor, 2013, p.103). Moreover, he brings the MT to the scope of AVT by adding a column describing subtitles and how they relate to the original soundtrack. While these adjustments fill some of the gaps of the MT model, they create, in turn, other issues.

Table 2: Taylor's modification of Thibault and Baldry's MT

T	Visual frame	Visual image + kinetic action	Soundtrack	Subtitle (in Italian)
1		Group of elephants grazing in grassland. Pond in background. Nearest elephant moving and waving trunk.	But eating and drinking means abandoning Echo and her newborn calf.	Ma per mangiare devono abbandonare Eco e il piccolo.

Note. Reprinted from "Multimodality and audiovisual translation," by C. Taylor, 2013, in Y. Gambier & L. van Doorslaer (Eds.), *Handbook of translation studies* (Vol. 4, pp. 98–104). John Benjamins. Copyright 2013 by John Benjamins.

At first glance, one of the issues that appears is the lack of distinction between the ST and TT. The model is divided into five columns, with four of them being dedicated to the audiovisual description of the ST, while only one of them is for the TT, consequently rendering this model more source-oriented. This division is understandable given that the main aim of Taylor is to examine to which subtitles interact with the different semiotic modes in an audiovisual text. Nevertheless, it still reduces the TT into its linguistic dimension. Another symptom of this issue is the absence of a visual representation of translation strategies that were adopted at the interlingual and intersemiotic levels.

The above issue is indicative of a lack of interest in the process of translation itself, a process that is motivated by many factors related to the macrocosm of the ST and interpretation. To translate is to first interpret the ST in light of its intertextual and extratextual context, on the one hand, and the translator's mental repertoire, on the other hand. Whereas it is challenging to feature external factors in this model, a mention of the interpretative aspect in translation can be included in order to shed more light on the role played by translators.

2.2. Adjusting the Model

The first adjustment that we propose to the model is to establish a clear-cut distinction between ST and TT. The aim behind the addition of a column dedicated to TT is to widen its scope and shift its focus from 'multimodal transcription vs. subtitles' to 'ST vs.TT'. Another benefit of this adjustment is that it facilitates the comparison between ST and TT because of how it visually structures data. This is something that would be highly valuable in comparative studies. Another adjustment would be to condense the different components of the visual channel (frame+description) into one column (the visual channel) and to expand the focus of the latter, along with that of the soundtrack column, to include descriptions of paralanguage in its different audiovisual manifestations. The aim is to

examine whether subtitlers took into account paralinguistic elements of communication while subtitling the film.

As pointed out before, including the interpretative aspect of translation in the model can provide more insights into the translation process. This is where Petrilli's interpretant distinction is relevant, as it enables the researcher to determine whether the interpretant adopted by the translator is that of identification, which hence translates into more literal strategies, or responsive understanding, indicating a more creative approach to translation. In this regard, exploring this aspect uncovers the extent to which the translation converges or diverges from ST. Next, adding a column for translation strategies, of which exploration is a vital component in any translation analysis, will simultaneously provide a visual representation of translation choices as they relate to the other elements of the TT, thus offering a more holistic view of this latter.

Table 3: Our Modified Version of Taylor's MT Model

Time	ST	TT	Translation Strategies
The Visual Channel	The Audio Channel	Subtitles	Interpretant
Visual frame: (screenshot)	Transcription and paralinguistic description		Responsive/ Identification
Paralinguistic description:			

2.3. Model Application

In order to test the applicability of the modified MT model and the extent to which the above adjustments increase its insightfulness, we decided to adopt it in the analysis of a sequence of similarly-themed scenes (phase) taken from the film *Abdelinho*, a 2021 Moroccan comedy film directed by Hicham Ayouch. The film tells the story of Abdellah 'Abdelinho', a young postal worker suffocated by the tediousness of life in a small Moroccan town, which he escapes through obsessions with the dazzling samba life of Brazil and fantasies about Maria, the star of a popular Brazilian telenovela. The extent of his love for Maria would magically enable him one day to communicate with her through his TV set. However, Abdelinho's life would change drastically following the arrival of Amr, a preacher from the Middle East, to his small town.



2.3.1. Situating the Sample

Following its theatrical release, and similarly to the fate that befalls films directed by the Ayouch brothers, *Abdelinho* was positively received by critics for its originality and absurdism while stirring controversy and backlash among Moroccan and Arab audiences for its depiction of Muslim religious figures. Many believed that Ayouch sought, through satire, to pigeonhole them into Machiavellian masterminds aiming at stifling people's

freedom and artistic inclinations. Ayouch (2023) responded to these accusations by denying any intentions on his part to ridicule or undermine religion and its symbols, insisting that his aim was simply to criticise a group of individuals who instrumentalize religion to gain authority and financial benefits (in Madar21, 2023). Currently, the film is available for streaming on Netflix, and is subtitled into standard Arabic and English.

The sequence to be analysed below starts from the forty-minute mark and lasts for ten minutes (approximately 10% of the film running time, which is 94 minutes). It begins with Abdelinho, under the insistence of his mother, who desperately wants him to marry, attending one of Sheikh Amr's televangelist-esque gatherings. Amr calls him to the stage, pretends to know his obsession with Brazil and Maria at first glance, and starts to pray for him. To his surprise and that of the audience, Abdellah calls him a fraud and descends from the stage. Following his humiliation, Amr blacklists Abdellah, especially after he refuses his bribe, and tries to turn the people in the town against him.

3.3.2 Extract from the Sample Analysis

Timestamp	ST	TT		Translation Strategies
Scene 1/5	The Visual Channel	The Audio Channel	Subtitles	Interpretant (Responsive understanding/ Identification)
40:51	 <ul style="list-style-type: none"> Amr closes his eyes and opens his arms as if he is receiving spiritual inspiration. Then he opens his eyes and starts looking at Abdellah's direction 	<p>Audience: عمر، عمر، (Cheering)! عمر</p> <p>Amr: والآن (taking a deep (breath</p>	<ul style="list-style-type: none"> Amr! Amr! Amr! Amr!... And now... 	<p>Identification</p> <p>Literal translation</p>
41:11	 <ul style="list-style-type: none"> Lights flashes on Abdellah. He hesitantly goes to the stage 	<p>حان وقت ... إنقاذ الروح هناك روح ... في هذه البلدة ... تايهة ... وهذا الشخص اسمه ... (Suspense music) اسم الشخص ... (long pause)</p>	<p>It's time to save souls. There's a soul in this city.. That is lost.</p> <p>The name of this person is ..</p> <p>The name of this person is ..</p>	
41:27		<p>"عبد الله البرقاوي" Abdellah's mom: ولدي هادا!!!! (Screaming in excitement) • زيد زيد متخافش! زيد، زيد (speaking quickly) Audience: عبد الله، عبد الله،</p>	<p>Abdellah Barkaoui</p> <p>It's my son. Go on, go on. Don't be shy. Go on, go on.</p> <p>Abdellah! Abdellah!</p>	<p>Responsive understanding</p> <p>Equivalence (functional)</p>

<p>42:02</p>		<p>عبد الله! cheering sounds in the) (background</p>	<p>Abdellah!Abdellah! Abdellah...</p>	<p>Amplification</p>
<p>42:18</p>	<p>• Flashing lights, Amr swiftly moving on stage and addressing the audience with passion</p>	<p>Amr: لماذا أتيت إلينا؟ ولماذا <u>تشعر</u> بأنك <u>بحاجة</u> لإنقاذ روحك؟</p>	<p>Tell me, son, why did you come to me? Why do you feel the need to save your soul?</p>	<p>Identification</p>
<p>42:58</p>	 <p>• Amr raises his hands and starts praying. Lights stop flashing.</p>	<p>أرأيتم... روحه <u>المسكينة</u> معلقة بخيط... <u>رفيع</u> (screaming) حتى أنه.. لا يعرف.. لماذا هو هنا.</p>	<p>Do you see? His poor soul... Is tied by a string that's very thin. because he... doesn't know why he's here</p>	<p>Identification</p>
<p>43:12</p>	 <p>• Abdellah calls out Amr in the middle of his prayer and leaves the stage. Lights on Amr's befuddled</p>	<p>"عبد الله".. والدتك اعترفت لي بأنك.. <u>مفتون بالبرازيل</u>...</p>	<p>Abdellah, your mother confessed to me that you are in love with Brazil.</p>	<p>Word-for-word translation</p>
<p>43:12</p>		<p>وأنتك أيضا (in an accusing) (tone تدرب نساء وفتيات البلد على <u>الرقص الماجن المخزي</u>. وقالت لي أيضا، أنك تقضي لياليك... في مشاهدة مسلسل تلفزيوني برازيلي <u>والعياذ بالله</u></p>	<p>And that you are also training the women of this city to be dirty and cursed dances And she also told me that you spend your nights watching a damned Brazilian TV show.</p>	<p>Identification</p>
<p>43:12</p>	<p>• Abdellah calls out Amr in the middle of his prayer and leaves the stage. Lights on Amr's befuddled</p>	<p>(addressing the audience in an angry tone) من يهدم؟ من يهدم ديننا؟ وثقافتنا؟ (Dramatic thunderclap sound effect) من؟</p>	<p>Who is breaking... our religion? Our culture? Who?</p>	<p>Identification</p>

43:45



(Dramatic thunderclap
sound effect)

Audience-
(screaming)

Amr: انه الغرب!

Thunderclap sound)
(effect)

وبرامجه الشيطانية!

هل هذا يعقل؟ (rhetorically)
(asking the audience)

Audience-
! لا!

Amr: هل هذه شيم المسلم
الصالح؟

(calmly and confidently)

Audience : لا!

Amr : حتى أنها قالت لي أمك،

أنك تحب بطلة المسلسل واسمها
ماريا (ماريا، ماريا)

(Echoes of the last word.)

اللهم اغفر له وارحمه وقه عذاب
النار، جهنم...
(Calmly)

Abdellah: نتا غير مخريق!
(In a mocking tone)

-Who?

- Western countries.

And its television programs,
henchmen of Satan!

-Is that normal?

- No.

- Is it worthy of a good
Muslim?

-No.

-And your mother even told
me...

that you are in love with a TV
character called Maria!

- You're just a fraud.

Amplification

Responsive understanding

Identification

Transposition

Generalisation

Responsive understanding

Adaptation

Equivalence
(functional)

Scenes 2 and 3/5		Footage of audiences being stunned by Abdellah's reaction and Amr losing his temper because of humiliation and loss of sponsors. He later forces Abdellah to meet him at his Limousine			
Scene 4/5	description:	(No background music)			
46:00		Amr: أهلا بك، وأخيرا شرف البطل بتاعنا.	- Hi Look who's here. Our hero.		
47:00	<ul style="list-style-type: none"> Amr is smiling in a challenging and confident way. He touches Abdellah's knees. 	Abdellah: شنو بغيتي؟ (impatiently)	- What do you want?	Responsive understanding	Neutralisation
	<ul style="list-style-type: none"> Abdellah is equally acting defiantly <p>The camera alternates between each of the two characters as they are placed on opposite sides of the alternating frames to signify confrontation.</p>	Amr: عاجبني إنك ولد ذكي! (admiringly)	- I must admit, you're a smart guy.		Compensation
		5000 دولار، حلوين، مش كده؟	I'll give you 5000\$. What do you say?		
		إممم... (thinking) دماغك ناشف (sighing)	I see... You're tough when it comes to business,		Adaptation
47:30		ماشى (with a challenging laugh) 10.000 دولار، بس بشرط... (In an earnest tone) تيجي للعرض بتاعي وتعمل إلي هأقولك عليه... بعد كدا... كل واحد حيروح في حال سبيله.	aren't you? Let's round it up to 10.000\$ and you come to my show. And do what I tell you to do. After that, we	Identification	Word-for-word

48:00	<p>اتفقنا؟ Abdellah: كيصحابليك بلي تقدر تشري كلشي! (In a mocking tone)</p>	<p>will be even. You understand - You really think you can buy everyone?</p>	<p>Responsive understanding</p>	<p>Explicitation</p>
48:12	<p>:Amr Laughing نخش بقا على السينما والدراما وتعملي فيها شريف ..</p>	<p>Stop acting like a star.</p>	<p>Identification</p>	<p>Addition</p>
	<p>كل حاجة تتشري بالفلوس يا ولد.. أنا اشتريت كل حاجة بالفلوس.. أنا اشتريت قلبي ثمنك كام؟</p>	<p>Everybody's got a price. I bought God, boy, do you get that? Tell me your price.</p>		
	<p>Abdellah: أنا ..نساني!</p>	<p>-Forget about me.</p>		

3. Discussion

3.1. Some Insights from the Analyzed Sample

The multimodal analysis has uncovered a tendency toward the adoption of freer translation procedures (Newmark, 1988). This translation tendency becomes understandable after observing the different shifts taking place at the multimodal level in ST. For instance, the translator found themselves obliged to add information to the subtitles when the character of Amr speaks to fill the voids resulting from the long pauses characterising his enunciated dramatic speech. On the other hand, the translator was equally obliged to either omit or condense information that cannot be fully accommodated by the limited space required for each subtitle. However, audiovisual and contextual clues were taken into account while adding, omitting, or condensing information.

Table 4: Examples of Translation Procedures

Timestamps	TT	ST
47:00-47:30	I'll give you 5000\$. What do you say?	5000 دولار، حلوين، مش كده؟
	I see... You're tough when it comes to business , aren't you?	Long pause إممم (thinking) ... دماغك ناشف (sighing)
49:15-49:29	The Devil chose him...	والجميع ...
	and none of you are innocent!	الجميع مسؤول عن هذه الجريمة لأن إبليس ... تمكن من قلبه

At certain intervals, the identity factor in translation, as a paradoxical activity, was achieved by preserving a character's essence and idiosyncrasy. This is something that is observed in the difference in the subtitles' pacing and punctuation between Amr and Abdellah. Alterity, on the other hand, comes into play when the translator adapts prayers and religious expressions in Amr's speeches (**for example:** اللهم اغفر له وارحمه وقه عذاب النار - God, please save his soul, don't let it burn in hell), which may feel foreign if translated literally, into those of the target culture.

3.2. Limitations and Prospects

As seen above, the deconstructive aspect of this model allows the researcher to obtain insights into the cues that guide the subtitling process. It does not focus on a particular aspect of the translation microcosm, nor does it encourage the interpretation of translation techniques solely in terms of its macrocosm. Hence, this model is quite suitable for studies aiming at studying and analysing subtitles from a kaleidoscopic and interdisciplinary perspective. It may also be suitable to analyse dubbed media, though it may require adjustments to suit the specificities of this AVT mode. Despite its benefits and the insights it generates about subtitling as an interconnected process, researchers adopting it may face challenges arising from the multimodal transcription process.

This process may be time-consuming if undertaken traditionally and applied over an entire corpus. This is because it requires accurately spotting the different multimodal shifts in the ST, which renders it a better choice for analyzing samples. One solution we suggest to facilitate the multimodal transcription is to consult the screenplay of the film, if available, since it is the ST in its raw form, offering a direct representation of the dialogue, action cues, and narrative structure. By referring to the screenplay, we can ensure a higher degree of accuracy and consistency in transcribing the audiovisual elements. We can also use transcription apps to extract dialogue and subtitles. All that is left for the researcher then is to synchronise all of the above elements in order for patterns to emerge.

The model's focus on multimodality as one of the determining factors in translation choices makes it a great fit for analysing AI-generated/assisted subtitling. Thanks to the tools it offers, it enables researchers to examine the status of this emerging AVT trend and how AI handles spotting when preparing subtitles compared to human translators. This comparison is bound to raise questions about the future of AVT in light of advancements in AI translation-related technology, which has for a long time been based on a monomodal Natural Language Processing (NLP) model of training (Sulubacak & al., 2020). However, the introduction of Multimodal Machine Training (MMT) in the mid-2010s, developed to replicate the way human intelligence processes data obtained from different sensory inputs, is expected to revolutionize AVT (Pratyush, 2024). Will this latter be entirely dependent on a much more evolved multimodal AI technology in the near future?

Conclusion

To sum up, the present article underlines the necessity of putting multimodality on the map of AVT research. No matter what form or shape it takes, the transmission of audiovisual content across different spheres of communication should no longer be approached from a monomodal view of meaning. According to Gambier (2023), this latter is the fruit of “the interaction between signs on the screen, between those signs and the different stakeholders of the film industry, and between them and the viewers” (p.7). In this regard, many attempts have been made to analyse audiovisual texts outside of their linguistic dimension, chief of which was that made by Thibault and Baldry (2006), with their multimodal transcription model (MT), and Taylor's subsequent adaptation of this model.

In light of these considerations, our aim in this paper was to explore ways to include the multimodal dimension in subtitle analysis. First, we started with an overview of translation as an intersemiotic activity. The following step was to identify gaps in Taylor's use of the MT model for subtitle analysis in order to adapt it to the object of the present study, which was to uncover how semiotic elements in the audiovisual channels of a film shape translation strategies. After applying our version to an extract from the film, we discovered

that many alterations to the ST stem from attempts to manoeuvre different multimodal shifts and to maintain certain paralinguistic information necessary for cinematic purposes.

We believe that the adjustments proposed in this paper broaden the scope of Taylor's model, further expanding its applicability in AVT analysis. For example, these enhancements allow the model to extend its focus beyond interlingual subtitling, accommodating other modes such as dubbing and subtitling for the deaf and hard of hearing (SDH). Furthermore, the model can be effectively applied to analyse AI-generated subtitling, a technology whose use is on the rise. As multimodal AI systems grow, a multimodal approach can uncover how automated systems handle various semiotic modes, potentially leading to more accurate and context-sensitive generated subtitles.

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From Omission to the Mediation of Conflicts between Chinese and Western Narrative Norms and Poetics: A Case Study of English Translation of *Wolf Totem*


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Abstract

As a work of Chinese ethnic minority literature, *Wolf Totem* embraces a narrative structure and discourse rich in national and ethnic historical overtones, while also aligning with the narrative conventions of Chinese novels. This study, based on Howard Goldblatt's English translation, investigates how the translator reshapes the text's narrative structure and discourse through the strategy of "omission", and explores the resulted narrative effects. The analysis is situated within the broader context of the differing narrative poetics of Chinese and Western literary traditions. Drawing on the concepts of "grand narrative" and "little narrative" as well as "duration" and "narrative speed", the study reveals the translator's motivations and strategies in negotiating the tensions between Chinese and Western narrative norms. Furthermore, it revisits the relationship between modern and postmodern theories in Translation Studies (TS), advocating for a renewed focus on the translator, the translated text, and ideology through the lens of narrative conventions and underlying poetics. In this light, this study seeks to promote cross-cultural understanding and dialogue between source and target language cultures through the practice of translation.

Keywords: *Wolf Totem*, Omissions, Narrative Norms, Narrative Poetics, Chinese Ethnic Minority Literature

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1. Introduction

As Translation Studies (TS) increasingly expands into interdisciplinary fields, narratology has emerged as a vital theoretical resource for interpreting translation phenomena. Gerald Prince, in his seminal essay *Narratology and Translation* (2014), systematically explores how inevitable shifts, deviations, and interpretive renderings in translation impact both the narrating and narrated levels of narrative structure. His work deepens the theoretical dialogue between narratology and TS, highlighting that translation is not merely a linguistic transfer but a complex act of (re)narration involving cultural negotiation, ideological positioning, and translator agency (Prince 2014: 23). The introduction of this perspective marks the nascent formation of an intersectional paradigm between narratology and TS. It has also facilitated the deepening of the "translation as narration" concept within the field, providing a theoretical framework for uncovering the latent reconstruction of narrative structure and discourse in the course of translation. In recent years, the intersection between narrative theory and TS has become increasingly diverse, exhibiting a trend towards specialization. For instance, emerging studies such as cognitive narratology (Yang, 2021) and affective narratology (Chen, 2022) are being gradually introduced into TS. These approaches aim to illustrate the complex interactions between textual narrative, the translator's cognitive mechanisms, and the reader's affective response. The adoption of such interdisciplinary perspectives has not only expanded the theoretical dimensions of TS but also conceptualized translation as a complex meaning-making process. In this regard, translation is not merely a linguistic act of interlingual transfer, but a dynamic process of reproducing and reconstructing narrative and cultural meanings.

Wolf Totem is a semi-autobiographical novel whose author, Jiang Rong, draws upon personal experience. The narrative threads the life and observations of Chen Zhen as a sent-down youth (知青, educated young people in China during the 1960s–70s who were sent from cities to rural areas as part of the "Up to the Mountains and Down to the Countryside" movement) into the Inner Mongolian grasslands, depicting a unique social and ecological panorama of the region during the 1960s and 1970s. The text not only depicts survival experiences within a specific historical context but also offers profound insights into the symbiotic relationship between humanity and nature, as well as the complex nature of Chinese ethnic cultural identity. Since its publication in 2004, the work has garnered widespread attention and has been translated into over thirty languages. The English version, translated by the renowned sinologist Howard Goldblatt and published by Penguin Books in 2008, represents a milestone in the translation of contemporary Chinese literature.

Academic attention to the English translation of *Wolf Totem* has surged in China, only with a small subset of studies from the lens of narratology. A review of existing literature reveals several deficiencies: first, corpus selection lacks systematicity, often relying on fragmented cases that cannot support broad conclusions; second, theoretical frameworks

remain singular, predominantly relying on Mona Baker's socio-narrative theory of "narrative reframing" while neglecting the perspective of literary narratology; third, narrative analysis remains superficial, often limited to describing structural changes without probing the narrative mechanisms and cultural motivations. Simply put, few studies have systematically categorized omission within the *Wolf Totem* translation with a corpus approach, nor have they adequately explored the behind these strategies through the lens of comparative narrative poetics. By integrating literary narrative theory with corpus-based methods, this study systematically observes the narrative structure and discourse of the translation, supplemented by case studies. Against the backdrop, this study attempts to reveal how the translator navigates conflicting narrative norms, thereby deepening the understanding of translation itself and its function in narrative and cultural construction.

2. Research Methods

A mixed-methods paradigm that integrates both quantitative and qualitative approaches is adopted to achieve a systematic identification and interpretation of omission in the course of translation. At the initial stage, an operational definition of omission is introduced to clarify its manifestations and identification. Along with the definition, instances of omission in the translation are systematically identified and annotated based on a parallel comparison of the Chinese and English texts. Subsequently, all omissions are manually screened and categorized into different types of omitted information. Grounded in this, the study employs certain narratological concepts to explore the structural and discursive shifts induced by omission, unveiling the underlying narrative poetics and cultural motivations.

2.1. Data Collection and Categorization of Omission

Dimitriu (2004: 165) defines it as "a strategy by means of which professional translators delete words, phrases, sentences, sometimes even more consistent parts of the source texts in order to adjust—linguistically, pragmatically, culturally, or ideologically—the translated text for their target audiences." Given the specific characteristics of the text and operational feasibility, this study limits the analysis unit to the sentence level. In this light, the sentence is viewed as a relatively autonomous narrative unit. Accordingly, sentence omissions are classified into two categories: "Partial Omission", where the translation retains part of the sentence content but omits specific words, phrases, or clauses; and "Full Omission", where the entire source sentence is removed in the target text.

The study first compiled the source and target texts into a parallel format and utilized the TMX MALL Aligner tool to achieve segment alignment, constructing a bilingual corpus for systematic analysis. Following this, a manual comparison of source and target segments was conducted to identify omitted segments. This process resulted in the compilation of the "Statistics of Sentence Omission" (see Table 1), which serves as the quantitative basis for subsequent categorization.

Table 1 Statistics of Sentence Omission

Omission Type	Frequency	Total Number of Sentences in ST	Omission Rate
Partial Omission	95	11,530	0.82%
Full Omission	3,410	11,530	29.58%
Total	3,505	11,530	30.40%

P.S. Partial Omission Rate = Frequency of Partial Sentence Omissions ÷ Total Number of Sentences in ST

1. Full Omission Rate = Frequency of Full Sentence Omissions ÷ Total Number of Sentences in ST
2. Overall Omission Rate = (Partial + Full Sentence Omissions) ÷ Total Number of Sentences in ST

Building upon the omission statistics presented in Table 1 and the omission annotations, this study further categorizes and quantitatively analyzes the omitted instances according to their information types. It is important to note that the classification of information categories is primarily based on the overall informational attributes of the omitted content. Given that the omitted content often involves certain overlaps and intersections, categorization was determined according to the dominant information type present in each omission, thereby ensuring the scientific rigor and accuracy of the classification.

Specifically, the omitted information in the source text can be broadly classified into the following five categories:

1. Historical and Cultural Information: Including historical context, cultural descriptions, and references to allusions or classical texts.
2. Settings: Involving descriptions and exposition of the story's setting, environmental atmosphere, and specific scenes.
3. Character Actions and Speech: Encompassing the concrete actions and dialogues of both primary and secondary characters.
4. Character Psychology: Covering expressions of inner thoughts, emotional changes, and psychological responses of characters.
5. Other Information: Referring to omitted content that does not fall clearly into the above four categories and lacks a distinct informational tendency.

To quantitatively analyze these categories, the study employs the following calculation formulas:

1. Category Proportion = (Number of omissions in the category) ÷ (Total number of omissions) (Formula 3.4)
2. Subcategory Proportion = (Number of omissions in the subcategory) ÷ (Total number of omissions) (Formula 3.5)

Based on this classification and calculation method, detailed statistical data on the omission of different information categories were obtained, as shown in Table 2.

Table 2 Statistics of Omission by Information Category

Category	Subcategory	Quantity	Subcategory Proportion	Category Proportion
Historical & Cultural Information	Historical & Cultural	1330	37.95%	37.95%
Settings	Background	126	3.59%	8.50%
	Environment	172	4.91%	
Character Actions & Speech	Wolf's Actions	247	7.05%	27.22%
	Chen Zhen's Actions	112	3.20%	
	Chen Zhen's Speech	455	12.98%	
	Minor Characters' Speech	140	3.99%	
Character Psychology	Chen Zhen's Psychology	341	9.73%	10.93%
	Minor Characters' Psychology	42	1.20%	
Others		540	15.40%	15.40%
Total		3505	100%	100%

According to the data presented in Table 2, omissions involving Historical and Cultural Information account for the largest share, constituting 37.95% of the total deletions. This is followed by omissions related to Character Actions and Speech, which represent 27.22% of the overall omissions. The category labeled as Others accounts for 15.40%, while deletions concerning Character Psychology make up 10.93%. The smallest proportion of omissions falls under Settings, comprising 8.50% of the total omitted content.

2.2. Conceptual Framework from Narratology

The analytical framework draws upon the theoretical groundings of Genette's (1983, 27) tripartite model of narrative structure. Genette's narratology, a classic structuralist framework for narrative analysis, divides narrative into three levels: story, narrative, and narration (Genette, 1983: 27). Narration, the surface level, refers to the concrete and directly visible way in which a story is told. Word choice, sentence length, and narrating agent are all elements that belong to this level. Narrative, the second level, does not concern the act of narration but rather the way in which the events and characters of the story are offered to the reader. Genette's final and deepest narrative level is *histoire*, which is translated as story. As Herman and Vervaeck point out, "this level is not readily available to the reader. Instead, it amounts to an abstract construct" (Herman & Vervaeck, 2019: 43).

This study further adopts Herman & Vervaeck's (2019: 64) detailed classification of the "narrative level," anchoring the analysis on three core dimensions: time, characterization, and focalization. This dimensional division not only maintains the hierarchical logic of Genette's model but also provides a vantage point for specific textual analysis. To deeply elucidate the latent motivations behind narrative reconstruction, this study employs two sets of core narratological concepts: First, Lyotard's (1984: 38) theory of "grand narrative" and "little narrative" is utilized to explain the narrative poetics underlying the translator's omissions—specifically, how the translator responds to or resists the macro-narrative framework of the source text through omission. Second, Chatman's (1978: 68-69) concept of "duration" and Prince's (1982: 55) "narrative speed" are applied to discover the mechanism by which omission impacts narrative rhythm.

3. Interconnection between Translation, Omission, and Narratology

The development of TS shares a parallel developmental trajectory with narratology: both fields underwent a theoretical turn from structuralism to post-structuralism, reflecting the interconnected understanding of translation, omission, and narrative. The modern phase of TS is grounded in modern linguistic theories and predominantly adopts empirical or descriptive paradigms, viewing translation as a phenomenon in the target cultural and social systems (Song, 2018: 20). In other words, this phase emphasized the faithful transfer of the source narrative's surface content; narrative was considered an inherent, relatively stable property of the source text, while interventionist acts like omission, which disrupt the source's "integrity", were often marginalized and conflicted with the principle of faithfulness.

As the post-structuralist philosophy influenced TS, the modern paradigm shifted to the postmodern. Postmodern TS, influenced by post-structuralist theories on language, meaning, and representation, posits that language does not objectively describe the world but constitutes it, and that meaning is not fixed but results from subjective power (Song, 2019: 10). In this light, translation is redefined as the practice of re-narration, where the translator actively participates within the target cultural context. The translator, constrained by the source narrative framework, simultaneously reconstructs the source narrative through linguistic choices and structural adjustments, allowing their ideological stance and cultural cognition to intervene in the process. From this perspective, omission ceases to be a mere shift at the textual surface; rather, it becomes an explicit expression of the translator's voice, thus facilitating the reconstruction of the source text's story world (Herman, 2002).

3.1. Shifts of Narrative Structure from Omission

The source text's narrative structure exhibits a sense of historical and cultural construction, with all 35 chapters beginning with an "Epigraph" (跋, referencing ancient texts or legends about wolves and nomadic people), which is classified as "Historical and Cultural" information (accounting for 37.95%) in Table 2. Compared to the main plot

progression, these Epigraphs form the deep cultural foundation of the source narrative, providing a basis for subsequent plot development through historical tracing and cultural positioning. In contrast, the translator employed a uniform omission strategy for all 35 Epigraphs: every textual quote was completely removed, leaving only the chapter number and the main body text. This intentional act directly results in a simplified, de-interculturalized tendency in the target text's surface narrative structure. The following specific cases from Chapters 5 and 27 of the source text illustrate this contrastive analysis. Incidentally, literal translation (LT) is my own translation made for non-Chinese speakers to better understand the omitted Chinese text.

Example 1 (Historical and Cultural Information)

ST: “或云，突厥之先出于索国，在匈奴之北。其部落大人曰阿谤步，兄弟十七人，其一曰伊质泥师都，狼所生也。谤步等性并愚痴，国遂被灭。泥师都既别感异气，能徵召风雨。娶二妻，云是夏神冬神之女也。一孕而生四男……此说虽殊，然终狼种也。”

——《周书·突厥》（Jiang, 2004: 41）

LT: “It is said that the ancestors of the Tujue originated from the State of Suo, located north of the Xiongnu. The tribal chieftain was named Abangbu, who had seventeen brothers. One of them was called Yizhi Nishidu, who was born from a wolf. Abangbu and others were all foolish by nature, and their state was consequently destroyed. Nishidu, however, possessed an exceptional aura and could summon wind and rain. He took two wives, said to be the daughters of the Summer Spirit and the Winter Spirit. One pregnancy bore four sons... Although this account differs from others, they are ultimately descendants of the wolf.”

—— The Book of Zhou: Turks (Jiang, 2004: 41)

Example 2 (Historical and Cultural Information)

ST: “在我们的血液里，特别是在君主和贵族的血液里，潜伏着游牧精神，无疑它在传授给后代的气质中占着很大的部分，我们必须把那种不断地急于向广阔地域扩张的精神也归根于这部分气质，它驱使每个国家一有可能就扩大它的疆域，并把它的利益伸展到天涯海角。”

——（英）赫·乔·韦尔斯《世界史纲》
（Jiang, 2004: 287）

LT: “In our blood, particularly in the blood of rulers and aristocrats, lies a dormant nomadic spirit; beyond doubt, it constitutes a large part of the temperament transmitted to subsequent generations. We must attribute that spirit of constant haste to expand toward vast territories to this part of our temperament, which drives every nation to expand its territory and extend its interests to the ends of the earth whenever possible.”

—— H.G. Wells, The Outline of History (Jiang, 2004: 287)

From a narratology perspective, the chapter-opening Epigraphs are by no means simple supplementary information but actively participate in narrative construction through intertextuality. Example 1, denoting the mythical account of being born of a wolf, constitutes a cultural intertextual chain linked to the wolf ancestor cult myth (e.g., the relationship between the protagonist Chen Zhen and the wolf). This provides narrative overtone from a mythical archetype and enhances the text's historical validity. Through a spiritual interpretation, Example 2 draws on H.G. Wells's argument that the nomadic spirit is deeply ingrained in rulers' temperament, providing both cultural motivation and narrative evidence. Taken together, the translator's omission of the Epigraphs can be seen as a strategic act of systematically severing this intertextual network. As a result, the target text's surface narrative structure is simplified into event progression, directly initiating the chapter with the specific plot.

Regarding the internal narrative structure, the systematic omission of "Settings" (accounting for 8.50%) drives a structural shift from the source text's composite "Natural Environment-Character/Animal-Plot" narrative to a linearly driven "Character-Plot" narrative. This shift is concretized through the effects of omission on two types of typical scene information: background information (3.59%) and environment information (4.91%). The following specific cases illustrate this shift.

Example 3 (Settings - Background)

ST: “在冬季，干牛粪主要用来引火。那时的燃料主要是靠风干的羊粪粒，因为家家守着羊粪盘，每天只要在羊群出圈以后，把满圈的羊粪粒铲成堆，再风吹日晒几天就是很好的燃料，比干牛粪更经烧。但是在草原的夏季，羊粪水分多不成形，牧民在蒙古包里就不能烧羊粪，只能烧干牛粪。” (Jiang, 2004: 280)

LT: “In winter, dried cow dung is mainly used for starting fires... The primary fuel then relies on sun-dried sheep pellets, because every household guards their sheep dung pile, and after the sheep leave the pen each day, the pellets are collected, piled up, and dried for a few days, making a better, longer-burning fuel than dry cow dung. But in the grassland summer, sheep dung contains too much moisture to hold shape, so herdsmen cannot burn sheep dung in the yurt, and can only burn dry cow dung.” (Jiang, 2004: 280)

Example 4 (Settings - Environment)

ST: “六股浓浓的白烟像六条凶狠的白龙，杀向厚密的蚊群。顷刻间，毒蚊群像遇上了更毒的天龙一般，呼啸溃逃。救命的艾烟将整个羊群全部罩住，疲惫不堪的大羊小羊，扑通扑通跪到在地。” (Jiang, 2004: 282)

LT: “Six columns of thick white smoke charged like six vicious white dragons, slaying the dense swarm of mosquitoes. Instantly, the noxious mosquito swarm scattered and fled, as if encountering a fiercer celestial dragon. The life-saving artemisia smoke covered the entire flock, and the exhausted large and small sheep plopped down onto their knees on the ground.” (Jiang, 2004: 282)

Example 3, detailing the use of cow/sheep dung as fuel across seasons, establishes the relationship between the herdsmen and the ecological resources of the prairie, revealing the survival logic of the nomadic people. Example 4, creating the dynamic scene of white smoke driving away mosquitoes, utilizes sensory environmental details to construct the spatial structure of the prairie ecosystem. Background information in the source text usually depicts the history and lifestyle of herdsmen and the prairie's flora and fauna, serving as a foreground narrative that supplements and foreshadows the plot development. Environmental descriptions provide the ecological setting (prairie, sky, climate), helping build the overall spatial structure of the narrative—the composite “Natural Environment-Character/Animal-Plot” model that embodies Mongolian ecological philosophy and wisdom. The prairie ecosystem is closely linked to the lives of the wolves and herdsmen, and environmental changes (such as grassland degradation, extreme weather) indirectly propel the plot. Following the substantial omission of background and environment information by the translator, the overall narrative structural emphasis shifts from the complex interaction of “Environment—Character—Plot” towards a simplified, linearly driven “Character—Plot” narrative model.

3.2. Shifts of Narrative Discourse from Omission

The preceding section analyzed the resulted effects of the target text at the narrative structure level through the omission of “Historical and Cultural Information” and “Settings.” As the core element of narrative, the construction of a character's image relies on the interaction among their action, speech, and the mode of focalization in the narration (Bal, 2009: 114). Accordingly, this section focuses on the omission strategy concerning the actions, speech, and psychological descriptions of the core character, Chen Zhen, in *Wolf Totem*. Specifically, it elucidates the rewriting of characterization at the narrative discourse level and discusses its impact on character construction.

Example 5 (Character Action and Speech - Chen Zhen Action)

ST: “陈阵就先把马驹的胃包大肠小肠掏出来，扔到炉灰堆旁边，随狗们去抢。然后从包里拿出两个空肉盆，把马驹的心肝肺、腰子气管盛了满满两盆，放在包里碗架下的阴凉处，留作下一顿的狼食和狗食。” (Jiang, 2004: 249)

LT: “Chen Zhen first took out the foal's stomach, large and small intestines, and threw them beside the ash pile for the dogs to fight over. Then he took two empty meat basins from his bag, filled them both with the foal's heart, liver, lungs, and kidneys, and placed them in the cool area under the bowl rack inside the yurt, saving them for the next meal for the wolf and the dogs.” (Jiang, 2004: 249)

Example 6 (Character Action and Speech - Chen Zhen's Action)

ST: “陈阵把小狼安顿好了以后，给小狼一顿美餐——

大半个煮熟的肥羊尾，让它体内多积累一些御寒的脂肪。” (Jiang, 2004: 346)

LT: “After settling the little wolf, Chen Zhen gave it a gourmet meal—more than half a cooked fat sheep tail—so that it could accumulate more fat to ward off the cold.” (Jiang, 2004: 346)

Chen Zhen’s detailed actions in the source text, such as processing the foal’s entrails (Example 5) and feeding the young wolf (Example 6), are not isolated survival details but the practical manifestation of the human-wolf symbiosis culture. A character is not a pre-existing entity in the text but a dynamic result constructed through a series of actions, speeches, and the narrator’s choices (Bal, 2009: 113). In this light, these action details transform Chen Zhen from an observer into a practitioner: he directly engages in the material practices of grassland culture by participating in the herdsmen’s daily labor; and he elevates his personal curiosity about the wolf to cultural symbiosis through actively caring for it. Narratively, these action details not only give the character depth and development but also establish the necessary real-world context and psychological motivation for the subsequent emotional bond between Chen Zhen and the wolf, constituting key nodes in his character arc. It is fair to say the translator’s selective omission of the narration of these related actions weakens the process of Chen Zhen’s transformation from observer to practitioner, leading to a flattening effect in character construction. The character image tends to be compressed into a one-dimensional plot device, losing its cultural embeddedness and emotional growth trajectory.

Example 7 (Character Action and Speech - Chen Zhen’s Speech)

ST: “陈阵小声对杨克说：我有一个发现，听了狼的长嚎，你就会明白蒙族民歌为什么会有那么长的颤音和拖音了。” (Jiang, 2004: 258)

LT: “Chen Zhen whispered to Yang Ke: I’ve made a discovery. If you listen to the wolf’s long howl, you’ll understand why Mongolian folk songs have such long trills and trailing notes.” (Jiang, 2004: 258)

Example 8 (Character Action and Speech - Chen Zhen’s Speech)

ST: “陈阵低低自语：小狼，小狼，腾格里会告诉你的身世和真相的。在我的梦里咬我，狠狠地咬吧……” (Jiang, 2004: 353)

LT: “Chen Zhen muttered low to himself: little wolf, little wolf, Tengger will tell you your origins and the truth. Bite me in my dreams, bite me fiercely...” (Jiang, 2004: 353)

From a narratological perspective, character speech is the primary mechanism by which the narrator filters a character’s consciousness, serving as the internalization and individualization of narrative. Cohn (1978: 14) defined this narrative mode as “narrated monologue,” which occurs: “when the inner world of a character is presented by the narrator in language stylistically approximating the character’s own.” In Example 7, Chen Zhen links the wolf’s howl to the trills and trailing notes of Mongolian folk songs, revealing that prairie music imitates natural acoustics and reflects the cultural gene of the nomadic people to convey truth through sound, thereby demonstrating Chen Zhen’s deeper understanding and reflection on Mongolian culture. Example 8, through internal

monologue, portrays Chen Zhen's dual emotion of worship and guilt toward the wolf, illustrating his spiritual symbiosis with it. This technique of implanting the character's consciousness strengthens the cultural reflective dimension of the character, allowing the reader to perceive his cognitive and emotional evolution through his language. Nevertheless, the translator's omission of some narrated monologues creates a more external, behavior-oriented narrative style. While this approach facilitates the reader's rapid grasp of the main narrative flow by constructing Chen Zhen's cultural understanding and psychological change primarily through plot progression rather than explicit speech, it may reduce the depth of the character's complexity.

Example 9 (Character Psychology)

ST: “他的心怦怦直跳，如果狼粪冒出浓烟，那可是有史以来，汉族人在蒙古草原腹地点燃的第一股狼烟。” (Jiang, 2004: 204)

LT: “His heart pounded. If the wolf dung emitted thick smoke, that would be the first wolf smoke ever lit by a Han person in the heartland of the Mongolian grassland.” (Jiang, 2004: 204)

Example 10 (Character Psychology)

ST: “陈阵有些害怕，如果他真把狼烟点起来，不知全队的知青会对他怎样上纲上线，口诛笔伐呢。” (Jiang, 2004: 204)

LT: “Chen Zhen was somewhat afraid. If he really lit the wolf smoke, he wondered how the educated youth in the whole team would subject him to criticism and verbal attacks.” (Jiang, 2004: 204)

Psychological description, an important means of revealing a character's consciousness and emotional change, is closely linked to “focalization” in narratology. Genette (1980, 186) clearly distinguishes between “who speaks” (the narrator) and “who sees/perceives” (the focus of perception), noting that the mechanism of focalization concerns the perspective from which narrative information is selected, organized, and transmitted. In other words, focalization determines the viewpoint of the perceiving subject in the narration, critically influencing the depth with which the reader accesses the character's psychology, emotions, and cognitive experience. He classified focalization into three types (1980: 188–190): (1) Zero Focalization: The narrator possesses knowledge transcending any character (Narrator > Character), presenting an omniscient viewpoint; (2) Internal Focalization: The narrator's knowledge aligns with that of a specific character (Narrator = Character), allowing the reader to experience events through that character's perception; (3) External Focalization: The narrator lacks sufficient information to enter the character's mind (Narrator < Character), restricting the narration to external behavior and appearances, akin to an objective record.

Examples 9 and 10 employ typical internal focalization to show Chen Zhen's contradictory psychological activity (curiosity and fear) before lighting the wolf smoke. This narrative focalization mode not only conveys Chen Zhen's imagination and

expectation regarding the symbolic meaning of the wolf smoke but also hints at the psychological projection of “individual vs. collective” and “Han vs. Mongol” identity, constituting a dual tension between individual experience and the grand narrative. The target text’s omission of similar internal focalization shifts the narrative focus from internal focalization toward external focalization. The character’s internal conscious activity, emotional conflict, and the cultural identity cognition it carries are consequently weakened, with the narrative emphasis leaning toward external behavior and the event itself. Simultaneously, this makes the narrative in the translation focus more on the experiential description of human-nature interaction, weakening the original work’s metaphorical structure concerning ethnicity, politics, and identity.

In summary, the selective omission of narrative details concerning Chen Zhen’s action, speech, and psychology in the English translation of *Wolf Totem* alters the path of character construction. It shifts the original narrative mode—centered on the character’s internal consciousness—towards a more objective, external narrative orientation, prioritizing plot progression via visible behavior, moving toward an event-driven narrative mode.

4. Narrative Norms and Narrative Poetics

Toury describes norms as “the translation of general values or ideas shared by a community—as to what would count as right or wrong, adequate or inadequate—into performance ‘instructions’ appropriate for and applicable to concrete situations” (Toury, 2012: 63). He further observes that “norms can influence not only translation of all kinds, but also at every stage of the act” (Toury, 2012: 81). In this regard, the translator’s intervention through omissions—which leads to narrative shifts—can be traced back to latent conflicts between Chinese and Western narrative norms grounded in poetics differences. As Hermans (1999: 79) notes, translation norms are “constructive,” emerging from the collision and negotiation of different cultural narrative logics, not single-sided cultural replication. Consequently, omission can be viewed as a practical path for reconciling conflicts between source and target cultural narrative norms. This section aims to analyze the underlying motivations for the translator’s modulation of narrative effects by contrasting Chinese and Western narrative poetics and norms, utilizing narratological concepts.

4.1. Mediation between Grand Narrative and Little Narrative

Within Lyotard’s postmodern framework, the “grand narrative”, derived from the Enlightenment, constructs social consensus through its function of “unification and legitimization;” the “little narrative”, conversely, employs localized, differentiated, and decentralized narrative practices to deconstruct singular authority, becoming the core vehicle for the decentralized reconstruction of meaning in postmodern society (Lyotard, 1984: 38). The tension between the grand and little narratives can essentially be viewed as a dispute between the narrative paradigms of modernity and postmodernity: the former

pursues universal truth and historical inevitability, while the latter emphasizes pluralistic experience and the legitimacy of individual discourse. The source text constructs Chinese historicity and collective narrative through extensive information outside the main storyline, representing the grand narrative poetics of Chinese ethnic minority literature: the micro-narrative of individual experience carries and conveys the macro-intent of collective cultural reflection and civilizational critique.

Firstly, the author establishes historical authenticity by invoking Mongolian secret histories, Genghis Khan legends, and world history, supplemented by extensive background and environmental descriptions of the nomadic people, linking the wolf totem to Mongolian secret histories and contemporary ecological crises. Secondly, the source text interweaves the history of prairie ecology with the trauma history of the Cultural Revolution through the speech and psychological descriptions of educated youth like Chen Zhen (e.g., policy-driven wolf extermination and dust storms), implying a critique of “sheepish culture” by the sent-down youth collective and embodying the grand theme of “Critique of Agrarian Culture – Salvation by Nomadic Civilization”.

Lyotard suggests that postmodern society needs to replace grand narratives with little narratives to advocate for difference and express the theme of social decentralization (Song, 2020: 17). The translator, acting as a mediator of cross-cultural narration, uses omission to shift the source text’s “little narrative in the context of grand narrative” mode toward a target text dominated by individual experience. This is essentially a dynamic negotiation to reconcile conflicting Chinese and Western narrative norms. On one hand, the translator's omission of historical/cultural details, background, and environmental description weakens the historical and nationalistic coloring, redirecting the narrative focus towards individual adventure and simplifying the complex ethnic cultural symbol into a “prairie adventure story”. On the other hand, the translator’s omission of speech and psychological descriptions related to Han-Mongol cultural comparison dissolves the civilizational critique dimension of the Chinese narrative. This approach reflects the Western narrative’s rejection of culturally critical grand narratives, favoring a shift towards depoliticized, universal ecological themes, aligning with the Western narrative tradition of separating individual experience from macro-history.

4.2. Narrative Duration and Narrative Speed

Narrative duration and narrative speed are the mechanisms for regulating narrative rhythm. Narrative duration involves the relationship between the time spent reading the narrative (discourse time) and the duration of the story events themselves (story time), comprising five possibilities: (1) Summary (Discourse time < Story time); (2) Ellipsis (Discourse time = 0); (3) Scene (Discourse time ≈ Story time); (4) Stretch (Discourse time > Story time); (5) Pause (Story time = 0) (Chatman, 1978: 68-69). Prince (1982: 55) further stated that in any specific narrative, the events and states that constitute the narrated world can be presented faster or slower. The rate at which it unfolds is the narrative speed. The speed of a narrative equals the relationship between the duration of the narrated

events—the (approximate) time taken for events to progress or be imagined to progress—and the length of the narrative (e.g., expressed in words, lines, or pages). The narrative duration of the *Wolf Totem* source text is primarily “stretch” (discourse time > story time): the author prolongs the discourse time through dense historical allusions, cultural details, and character action, speech, and psychological descriptions, resulting in a reduced narrative speed ratio and presenting a slow-paced, dense narrative structure.

The translator’s omission affects this duration relationship: On one hand, removing extensive historical allusions and detailed cultural descriptions compresses discourse time, mitigating the degree of “stretch” and moving the duration relationship closer to “scene” (discourse time story time). On the other hand, the translator’s omission physically shortens the narrative length. While retaining the main plot and maintaining the event progression time, this adjustment objectively increases the narrative speed (event progression time / narrative length) of the target text, making the narration faster and more compact. The deep logic of this mediation lies in the differences between Chinese and Western narrative norms: Chinese literary tradition emphasizes depth through slowness, while Western narrative favors efficiency and speed in individual experience narratives, essentially reflecting a preference for “showing” over “telling”. Western narrative tradition holds that excessive narrative intervention “dulls the edge of mimesis”, indicating that it weakens the text’s ability to allow readers to autonomously perceive meaning through specific scenes, actions, and dialogue. They tend to favor the “showing” mode (where events drive the narrative) over the “telling” mode (which relies on the narrator’s direct interpretation or evaluation) (Zhao, 2013b: 46–47). Furthermore, “telling” narratives often involve narrator intervention, which, while quickly conveying meaning, may suppress the reader’s imaginative space and sense of participation; “showing” narratives, by “letting the events speak for themselves”, construct a more open production of meaning (Barry, 2009: 229). In the translation of *Wolf Totem*, the translator uses omission to gradually shift the source text’s “telling” rhythm toward a “showing” rhythm. The translator’s adjustment process deeply aligns with the starting point of norm theory: “saving the difference” (Zhu, 2007: XI). This “saving the difference” is not mere cultural compromise but the reconstruction of a hybrid narrative norm in the target culture: it retains core symbols like the ecological significance of the wolf totem from the source text while adapting to the Western narrative expectation dominated by individual experience. Beyond the text, the translator’s conciliatory action reflects the core concern of postmodern translation studies: redirecting translation research toward a more politically conscious practice (Lemert, 1994: 268)—that translation is not just linguistic conversion but a site for the practice of power, ideology, and cultural discourse.

5. Conclusion

The translator’s strategic act of omission reconstructed the narrative structure and discourse of *Wolf Totem*, reshaping the narrative effect, which can essentially be seen as a mediatory act amidst the conflict between Chinese and Western narrative norms. On one

hand, the translator reshaped the surface and internal narrative structures, diluting the source text's "grand narrative" features and moving it closer to the Western "little narrative" norm, aligning with postmodern philosophy. On the other hand, the omission of action, speech, and psychological discourse shortened the discourse time, gradually shifting the source text's "telling" rhythm toward a "showing" progression, increasing the narrative speed and satisfying Western aesthetic expectations for fast-paced narratives.

In this regard, translation could be viewed as a process of cultural mediation rather than mechanical reproduction of the source text. The translator's intervention echoes the core issues of postmodern Translation Studies, demonstrating how narrative poetics and ideology subconsciously shape the translator's decisions and influence the narrative reconstruction of the target text. In the translation of Chinese ethnic minority literature, it is necessary to move beyond the binary stance of cultural conservatism or cultural compromise, dynamically examining the interaction between source and target narrative norms, and attempting to gradually integrate the narrative norms of the source world into those of the target world. This study reaffirms that academic attention to the interplay among the translator, the translated text, and ideology from the perspective of narrative poetics not only helps deepen the understanding of translation practice of Chinese ethnic minority literature but also provides new theoretical insights for Translation Studies.

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Theoretical and Practical Dimensions of Equivalence in the Arabic Translation of the Universal Declaration of Human Rights

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Abstract

This study investigates the critical role of the concept of equivalence in translation, especially in legal contexts. It addresses the theoretical and practical implications of translation equivalence, highlighting the lack of consensus among scholars regarding its definition. The research examines the types of equivalence prevalent in legal translation, explicitly using the Arabic version of the Universal Declaration of Human Rights UDHR, adopted by the United Nations in 1948. Legal translation involves translating legal texts, such as the UDHR, from one language, such as French, to another, such as Arabic. This process is intricate due to the complex nature of legal texts, multifaceted legal concepts, and the distinct meanings embedded in legal language. The study highlights that equivalence, a heavily debated term in translation studies, is interpreted differently across theoretical perspectives, including linguistic, functional, and interpretive approaches. In the context of legal translation, functional equivalence is the most relevant type, particularly in the Arabic translation of the UDHR, as it aligns well with legal translation components such as text nature, legal discourse, and system compatibility (Sarcevic, 1997). The notion of equivalence takes several forms; however, linguistic and grammatical equivalence is less attainable due to significant language differences. For this reason, the study primarily focuses on functional equivalence from a Sarcevic perspective, facilitating measurement through criteria such as equivalent juridical force, contextual adaptation to target legal norms, terminological fidelity, and pragmatic effect, without assessing overall translation correctness, as the UN recognizes this version. It employs qualitative methods, discourse analysis, and content analysis to explore equivalence in the UDHR's Arabic translation, aiming to clarify the relationship between the source and target texts by applying these operational criteria to judge realization.

Keywords: Arabic, French, Target Text, Functional Equivalence, Universal Declaration of Human Rights

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Introduction

The subject of the current study is of great importance in the field of translation, as it pertains to both its theoretical and practical aspects. Indeed, the concept of equivalence represents the cornerstone of the general theory of translation, as translation is often defined as the production of a target text that is equivalent to a source text or a target one. However, this perception does not elicit a clear consensus between a supporting team and a team that rejects the idea that translation is equivalence, which explains the conflicting opinions among theorists, translation scholars (traductologues), and even translation practitioners.

To assess the applicability of equivalence in legal translation, this research aims to clarify its nature and origin, and address its various and divergent definitions. We demonstrated that this divergence is due to the perspective from which equivalence is viewed, or, instead, to the multiple approaches translation theorists have taken to this concept, such as linguistic, functional, and interpretive approaches.

However, the primary goal of this study is to identify the types of equivalency that are most prevalent in legal translation, particularly in Arabic translation of the Universal Declaration of Human Rights. Although not legally binding, this document holds a distinguished position in international humanitarian law.

In this regard, it is essential to note that the Universal Declaration of Human Rights, adopted by the United Nations on December 10, 1948, is among the most widely discussed topics at the international and national levels. Hence, approaching the topic of human rights through translation could open new avenues given the limited studies on UDHR Arabic translation through equivalence lenses. For example, Bencherif (2012) offers a general test of equivalence feasibility in UDHR Arabic legal translation, while broader semantic analyses exist.

Indeed, this study analyzes the official UN French UDHR text (United Nations, 1948, A/RES/217 A) as the source text (ST), available at the UN Treaty Series in its authentic French version adopted December 10, 1948. The target text (TT) is the official Arabic UN translation (United Nations, 1948, Arabic version), authenticated by the UN as document ST/HR/1/Rev.1(Vol. I) and implemented in Arabic-speaking member states. In fact, no English version was consulted, as the French holds precedence in UN legal translation protocols for this document. Therefore, this study systematically analyzes all the 30 UDHR articles and preamble which consists of (159 sentences total) as complete units of analysis. Each article receives mandatory four criteria coding using official UN French ST (A/RES/217 A) vs Arabic TT (ST/HR/1/Rev.1). There is no selective sampling as 100% document coverage eliminates selection bias. Moreover, individual terms/phrases serve as coding evidence only, not separate analysis units.

While prior work in legal translation equivalence has examined general frameworks (e.g., Sarcevic, 1997), it lacks targeted analysis of the UDHR's Arabic version using operational criteria for functional equivalence, such as equivalent juridical force,

contextual adaptation to target legal norms, terminological fidelity, and pragmatic effect. This study addresses this gap by applying a coding scheme based on Sarcevic's indicators to UDHR articles as units of analysis, via qualitative discourse and content analysis, to test and identify equivalence realization without evaluating overall translation correctness.

As for legal translation, it is the process of translating legal texts from a source language, such as French, into a target language, such as Arabic. This process often appears complex, as its difficulty and complexity emerge from its components, such as the nature of the legal text, the legal branches related to translation, and the legal discourse, which often carries words and terms with multiple meanings, in addition to the diversity of readers in the legal communicative process.

Moreover, equivalence is considered a contentious topic in translation, with experts and theories in the field disagreeing on its definitions and classifications. Each individual perceives equivalency from a prevailing standpoint, considering factors such as language, text kind and function, communicative impact, and cultural context. This notion assumes an additional dimension in legal translation due to its complexity and technicality in law.

Consequently, we aimed to address the subsequent inquiry with our research: Which form of equivalence is predominantly manifested in the Arabic version of the Universal Declaration of Human Rights ? As long as functional equivalence is a more commonly used concept in legal translation, and the Arabic translation of the Universal Declaration of Human Rights is one of its cases, we assume its achievement in this translation due to its alignment with the components of legal translation; his hypothesis will be tested through the specified coding scheme on selected articles. However, this does not prevent the achievement of other types, such as dynamic, pragmatic, or textual equivalence. Functional equivalence is considered “achieved” when the target text elicits an equivalent response from the target audience as the source text does from the source audience (per Nida’s receptor response criterion) preserves legal intent and function despite formal shifts, and aligns with measurable indicators like contextual adaptation, terminological fidelity to legal norms, and pragmatic effect in Arabic legal discourse; it is “not achieved” if these fail, leading to misinterpretation or loss of juridical force.

Regarding equivalence types based on linguistic and grammatical structure, we observe that they are not realized due to the linguistic distance between French and Arabic, and because legal translation imposes a narrow framework for literal translation and its variants. Given that functional equivalence is a prevalent idea in legal translation, and the Arabic rendition of the Universal Declaration of Human Rights exemplifies it, we posit its realization in this context, as it aligns with the components of legal translation. Nonetheless, this principle does not hinder the attainment of alternative forms, such as dynamic, pragmatic, or textual equivalence. The language differences between French and Arabic, along with the restrictions on literal translation in legal translation, prevent equivalency grounded in linguistic and grammatical structure.

Thus, this study focuses on the notion of equivalence in translation, which clarifies the relationship between the source and target texts, in contrast to the concept of correspondence, which concerns the source and target language systems. Furthermore, we will briefly examine the alternative translation methods proposed by Jean-Paul Vinay and Jean Darbelnet: focusing on the equivalence method. We shall refrain from evaluating the translation's correctness or incorrectness, as the United Nations conducted it, and it is an authorized and implemented version.

This study operationalizes Šarčević's (1997) functional equivalence framework through four replicable criteria applied systematically to all 30 UDHR articles plus preamble (n=31 units) as complete units of analysis. Indeed, each criterion receives binary coding (+/-) based on direct textual evidence: **Juridical Force** assesses preservation of legal obligation modality (e.g., French "devra" → Arabic "يجب"); **Contextual Adaptation** evaluates alignment with Arabic civil law norms; **Terminological Fidelity** verifies use of UN-standardized Arabic legal terminology; and **Pragmatic Effect** measures equivalent legal audience response.

Decision rules establish clear thresholds: (قابلية+) indicates full functional equivalence when 3-4 criteria are met; (قابلية غير-) denotes non-equivalence when 0-1 criteria are achieved; blank cells (N/A) signify criteria inapplicable to specific article content rather than "not analyzed." Methodological reliability was ensured through double-coding by two independent researchers achieving 92% inter-coder agreement, triangulated with the UN Arabic Legal Terminology database and validated against parallel Arabic human rights treaties including the Arab Charter.

Accordingly, The present study employs a qualitative methodology, drawing on historical methods to examine the evolution and classification of equivalence, as well as discourse analysis and the standardization of legal language. Subsequently, we employed the definitions of equivalence types and analyzed their relevance in the legal translation of the Arabic rendition of the Universal Declaration of Human Rights. Shedding light on functional equivalence in the Arabic translation of the Declaration text, as defined by E.A Nida, because of its measurable practical indicators, prevalent application in legal translation, and its connection to the legal system. We employed content analysis of both the source and target texts, grounded in the principle of functional equivalence.

1.Theoretical Foundations and Historical Evolution of Equivalence in Translation Practice

The discussion of translation in the past focused on a binary dialectic between literal and free translation, as well as between form and content/substance. Post-World War II shifts highlight its contentious nature among theorists. Indeed, the discourse continued to emphasize the notion of equivalence in translation as a crucial term within the discipline dedicated to examining its theoretical and practical aspects.

Initially, the concept of equivalence has generated much debate, as it has been and continues to be a point of contention and disagreement among translation theorists. "In the past, the target text being equivalent to the source text was the focus of translation theorists. Despite the transformations that have occurred in the concept of equivalence, it remains a subject of dispute. One of the main reasons for this dispute is that most translation theories today view translation as both a linguistic and extra-linguistic phenomenon" (Lalbila, 2005, p.5). From the above quote, the concept of equivalence has evolved alongside the development of translation, in both its theoretical and practical aspects. Before addressing the fundamental issue of equivalence, it is helpful to touch on its historical origin.

1.1. The origin of equivalence

The term originated in mathematics, denoting value harmony (e.g., $A = B$), later adapted to translation despite linguistic subjectivity. Regarding translation equivalence, there is no explicit or precise record of when it was used. It is difficult to determine when the concept of equivalency was introduced, as Roman Jakobson discussed it in 1959. Some translation theorists argue that the phrase originated in mathematics, and this idea is supported by the fact that the term equivalency refers to a similar relationship between data that others may replace without producing significant change. In this context, Gladys Gonzalez said, "it is difficult to determine when the concept of equivalence was used, knowing that Jakobson mentioned it in 1959. Some translation theorists assert that the term appeared in the field of mathematics, and this hypothesis is justified by the fact that the term equivalence refers to a similar relationship between data that others can replace without causing significant change" (p.43).

However, according to E. A. Nada Dynamic (1995), applying the mathematical notion of equivalence to translation theory would be extremely difficult, as mathematics is a numerical, artificial language. In contrast, translation languages are human languages with a degree of subjectivity. Despite Nida's use of equivalence in his theory (formal and dynamic equivalence), he proposes a distinct concept of equivalence for translation. He mentioned that "in mathematics, equivalence requires a complete or partial identity, but when we talk about languages, this meaning is almost impossible since two words in two languages do not have the same meaning [...]" (p.225). Nevertheless, the issue posed by equivalence is not related to its use in mathematics, based on identity symmetry, but rather to its use in translation. On what basis is equivalence defined?

Before answering this question, we should note that translation theorists are divided into two camps: those who support the concept of equivalence and those who oppose it. On the one hand, Snell-Hornby and Gonzalez were opposed to the idea. They believe that using this concept is unacceptable because the source and target texts lack equivalent identity. Besides that, there are no absolute or complete equivalents, which is why Snell-Hornby (2002) describes equivalence as an ambiguous and fixed concept, by saying that

" [...] One should question whether equivalence is suitable for use in translation, as it is considered a highly fixed, one-dimensional scientific concept. Moreover, it does not have a clear meaning [...] " (p.71).

On the other hand, the translation theorists who support equivalence see that the criticisms of Mary Snell-Hornby and other opponents are unfounded, as Wilform Wiliss (2002) states: "It is incomprehensible how the concept of equivalence in translation has been called into question (Snell-Hornby, 1986). In fact, during the 1970s, translation studies viewed the concept of equivalence as fixed. The main reason is that representatives of functional and sociocultural translation approaches sought to eliminate the ambiguity surrounding the concept of equivalence. This is because contemporary translation studies, as it is said, have provided convincing arguments based on text analysis, and no one today can relate the source text to the target text without using some form of equivalence, whether partial or total"(p.73). Likewise, J. House (1997) commented on Snell-Hornby's argument as follows: "Snell-Hornby referred to one entry in the dictionary to support her claim that equivalence is fundamentally based on identity, which is why she described equivalence as an illusion in translation studies, seeing this concept as meaning the same thing hypothetically." On the contrary, I found in another dictionary that equivalence means the same value or the same goal or the same function [...] " (p.26).

Otherwise, we tried to draw attention as much as possible to the ongoing debate between supporters and opponents of the concept of parity; the issue of parity does not end with just supporters and opponents; instead, we find this concept contentious even within the supporting team (as we will see later). However, the question that arises is, what causes the controversy in the concept of equivalence? Is it its definition, its types, or what?

As previously mentioned, translation theorists and translation theories disagree on a single definition of equivalence or its classifications. Each theory or theorist provides their own definition and numerous classifications. This difference is due to the perspective from which equivalence is viewed, noting that a dominant factor is emphasized while other factors are neglected. Some define it based on language, the source or target text, the purpose or function, or based on the message recipient. However, it seems to us that a minimum agreement can be reached on the definition of equivalence in translation, regardless of the perspective from which it is viewed.

1.2. Definition of equivalence

When describing or explaining the relationship between the source and target texts, we use equivalence. This relationship is measured according to the five levels of analysis identified by J. Munday (2009), which are: first, the analysis of words, sentences, or entire texts; second, the analysis of the type of lexical meaning; third, the communicative effect produced by equivalence (dynamic equivalence); fourth, the similarity in linguistic features (formal equivalence); fifth, the goal and function of translation (functional equivalence) (p.184).

In the same context, if we attempt to summarize the typology proposed by Dorothy Kenny (2001, p. 78), it can be said that there are two types of equivalence: the first type is based on the word, sentence, or the entire text, while the second is realized at the level of meaning, such as explicit, implicit, and pragmatic equivalence. Furthermore, as for L. Venuti, who sees "that equivalence is based on lexical, grammatical, and stylistic analysis, and it is founded on the type of texts as well as the social function of translation" (2004, p. 147). Moreover, Susan Sarcevic (1997) views that the descriptions given to equivalence are considered the determinants of its meaning, "such as dynamic, communicative, stylistic, semantic, and functional equivalence"(p.47).

Therefore, to foster a deeper appreciation of the concept of equivalence, we will review its theoretical development in the field of translation, inspiring curiosity and a sense of ongoing progress for students and researchers alike.

1.3. Types of equivalence by key scholars

1.3.1. Roman Jakobson (1959)

As noted by Roman Jakobson (2003), one of the first linguists to discuss the issue of equivalence (*On linguistic Aspects of translation*, 1959), "equivalence is the point of divergence in translation and the fundamental problem of discourse, and it is considered the main subject of linguistics"(p.53). Highlighting the three types of translation, Jakobson distinguishes helps students understand the core concepts involved.

- A. Translation within the same language, such as quoting or paraphrasing.
- B. Interlingual translation occurs between two languages.
- C. Semiotic translation occurs between sign systems, such as translating a traffic sign into a different visual or symbolic system, illustrating how meaning shifts across different sign modalities.

In his article, "Equivalence in Translation: Between Myth and Reality," R. Jakobson(2000) notes that in interlingual translation, there is no complete equivalence between linguistic units; therefore, it is important to recognize the challenge involved, as "translation requires the existence of two equivalent messages in two different languages" (p.114), which can help students and scholars feel understood and motivated to explore solutions.

1.3.2. Eugene A. Nida and Charles Taber (1964/1969)

According to E.A. Nida and C. Taber, translation scholars have influenced the field with their scientific approach, unlike before World War II, when translation was a philosophical and argumentative subject. This issue is evident in Nida's book *Towards a Science of Translating* (1964) and the co-authored of the work *The Theory and Practice of Translation* (1969). In both books, we find terms such as 'science' and 'theory,' which indicate the innovative character of Nida's approach to translation, which draws on

linguistic, sociolinguistics, and theological elements, as well as the semiotic and communicative aspects of translation.

Indeed, Nida's theory was initially rooted in Bible translation research, a religious context. Nida notes how his work was later expanded to encompass other translation fields, influenced by Chomsky's generative grammar. As for our research, understanding the concept of equivalence is central to Nida's (1964) and Nida and Taber's (1969) theory, which divides it into formal and dynamic equivalence, clarifying key ideas for the reader. Influenced by Bible translation and Chomsky, they propose:

- Formal equivalence (Equivalence formelle)

Formal equivalence relies on focusing on the message of the original text and reproducing it by the translator in the target text, meaning generating an equivalent message that adheres to the linguistic and formal characteristics of the original text. According to Nida (1964), "Formal equivalence can be described as the formal relationship between the structure of the original text and the structure of the target text, such as replacing a verb with a verb, a noun with a noun, or a sentence with a sentence" (p. 159).

Furthermore, Nida (1964) believes that to produce the content and form of the original text's message, it is necessary to "produce grammatical units such as translating verb for verb or noun for noun, keeping the sentences as they are in the original text, and retaining formal indicators like punctuation marks and paragraph divisions..." (pp. 159-160). While the correspondence in words, each word from the original text is replaced with a corresponding word in the target text. Regarding correspondence in meaning, the translator aims to produce expressions with the same meaning, whether literal or non-literal; the important thing is that they convey the same meaning.

- Dynamic equivalence (Equivalence dynamique)

The concept of dynamic equivalence is attributed to Nida (1964) and Nida and Taber (1969), with the emphasis on the target-text reader and the effect the translation should have on its reader in which Nida demonstrates that "The dynamic equivalence approach is based on focusing on the target text reader, and this focus requires the translator to edit the original text according to the language and culture of the target text reader..." (pp. 159, 166). The dynamic equivalence approach focuses on the target text reader. This focus requires the translator to edit the original text according to the language and culture of the target text reader.

- The equivalent effect (Effet équivalent)

Based on Nida's vision of dynamic equivalence, it is achieved by producing an equivalent effect for the reader of the target text, emphasizing the importance of their experience. In other words, this effect is devoid of the culture and language of the source material, as is the case with formal equivalence, but instead responds to the language and

culture requirements of the target text reader. Hence, he formulated four objectives to achieve this equivalent effect, which are:

1. Adapting the meaning of the source text as a whole according to the structure of the target text,
2. Generating a target language structure that is practically similar to the structure of the source language, 3 – Producing acceptable stylistic equivalents, 4 – Generating an equivalent effect on the target reader"(Munday, 2009, p.186). Emphasizing stylistic acceptability reassures the audience about the translation's appropriateness.

1.3.3. J.C. Catford (1965)

J.C. Catford's approach to translation emphasizes a linguistic and mechanical perspective, highlighting the importance of understanding translation as a process that occurs between two languages. In his book, *A Linguistic Theory of Translation* (1965), he views translation as a pathway where the source language is systematically replaced by the target language, aiming to foster appreciation for the structured nature of translation. He also considers equivalence to be the foundation of translation practice and the primary focus of translation theory. It is notable to note that Catford divides equivalence into two categories:

- Formal Correspondence

J.C. Catford (2004) defines formal correspondence as "any category of the target language (unit, linguistic structure, or element thereof) that can be produced to occupy the same position in the source language"(p.27). This highlights how a part of the target language plays the same role in the original linguistic system, emphasizing the importance of structural similarity in translation. Formal equivalence is used to describe the source and target linguistic systems, fostering an understanding of their relationship within comparative linguistics.

- Textual Equivalence

Textual equivalence refers to any part or the entire text in the target language that corresponds to a part or the whole in the source language, based on form or structure rather than meaning, highlighting its role in translation analysis.

1.3.4. Werner Koller (1979)

The German school was influenced by Nida's work on dynamic equivalence, which prompted German scholars to direct their research towards the concept of equivalence as a fundamental concept. In this regard, we mention W. Koller's (1979) work, which established his approach to the distinction between Saussure's dichotomy of langue/parole. As a result, we find Koller distinguishing between correspondence and equivalence. Correspondence is the result of comparing the source linguistic system with the target linguistic system and extracting points of difference and similarity between them, which is

the subject of contrastive or comparative linguistics. As for equivalence, it is the subject of translation science and results from comparing the source text and the target text at the discourse level. In this case, equivalence " [...] is achieved between two texts and not by comparing two linguistic systems." [...] (as cited in Hatim & Munday, 2004, p.47).

According to Koller, equivalence depends on various linguistic and extra-linguistic factors related to both source and target languages, including historical and cultural contexts in which the original text was created and received (as cited in Hatim & Munday, 2004, p.49). This highlights the complexity of translation for the audience, fostering respect for contextual considerations.

As far as equivalence frameworks, Koller distinguishes the relationship of equivalence based on the "Double linkage." The first link relates to the original text, while the second refers to the communicative conditions specific to the message recipient. To define the frames of equivalence, the following conditions should be referred to:

A – The extra-linguistic circumstances that the text carries.

B – The implications (with the diversity of implicative values) conveyed through the style of expression.

C – The linguistic and textual norms (usage norms) that correspond to the parallel texts in the target language.

D – The manner in which the recipient of the message is taken into account.

And– the aesthetic characteristics of the source language text.

Based on Koller's approach to equivalence, "the original language text, with its linguistic and stylistic structure and potential meaning, is considered a fundamental factor in translation, or rather in translation studies" (as cited in Hatim & Munday, 2004, p.51).

Indeed, Koller divides equivalence into five types, which are:

- **Explicit equivalence** (Equivalence dénotative):

This equivalence is related to the extra-linguistic content of the text.

- **Implicit equivalence** (Equivalence connotative): This type is embodied through lexical choices, especially among near-synonyms.

- **Normative textual equivalence** (Equivalence textuelle normative): This equivalence refers to the types of texts and the different methods used to produce the target text.

- **Pragmatic equivalence** (Equivalence pragmatique): It is also called communicative equivalence, directed towards the message recipient, which Nida refers to as dynamic equivalence.

- **Formal equivalence** (Equivalence formelle): This equivalence concerns the form of the text, its aesthetic aspect, and the stylistic features of the original text. It is also known as expressive equivalence (as cited in Hatim & Munday, 2004, 51).

1.3.5. Juliane House(1977/1997)

J.House prepared her approach to translation based on the concept of equivalence, dividing it into pragmatic, semantic, and functional equivalence. Additionally, she drew inspiration for the idea of pragmatics in discourse from Michael Halliday's approach, which falls under the Prague School of Linguistics.

Indeed, House (1977) proposed a model for evaluating translation quality, distinguishing between two types of translation: Explicit translation (Over translation) and implicit translation (Cover translation), where explicit translation refers to " [...] The strategy used in translation if the target text does not have the same framework as the original text... And the explicit translation is equivalent to the original text at the level of language as well as the level of the text's language... As an example of this type of translation, we mention political and literary texts (p.213). As for implicit translation, it refers to " [...] A translation that is equivalent to the elements of the original text and equivalent at the level of the text's function as well as at the level of discourse, such as the use of political texts, for example(p. 179).

It is worth noting that within the framework of House's (1977/1997) analytical and pragmatic approach, the relationship of equivalence is defined by functional equivalence, meaning that the translation should have a function similar to that of the original text. Therefore, "the translation should use the same pragmatic meaning to achieve this similar function"(House, 1977, p. 26).

Moreover, House (1977) believes that equivalence in translation is based on the "double bond." The first bond is related to the source text, while the second is connected to the communicative conditions specific to the target text reader and their culture [...] " (p.26)

As for equivalence based on the form and structure of the text, House (1977) claims it has become ineffective and has been rejected by translation scholars. The reason for this is that "definitions based on formal, grammatical, or lexical similarity are considered reductive of equivalence and are no longer acceptable as long as two linguistic units may be ambiguous [...] "(p. 26). This means that measuring equivalence based on linguistic criteria is no longer valuable, which is why we find other types of equivalence, such as functional and pragmatic equivalence, adopted by contrastive linguistics for a long time because they were focused on discourse rather than linguistic structure or form.

1.3.6. Mona Baker (1992)

Mona Baker is one of the translation scholars who support the concept of equivalence. She views it from a communicative linguistic approach. She thinks that equivalence "is used by translators more than other methods due to its suitability, in addition to the fact that it does not have a clear theoretical framework"(House, 1997, p. 26). She also added to the concept of equivalence what she calls the similarity in "information flow" between the source and target texts.

Baker(1992) divides equivalence into four types in her book, *In other words: A coursebook on translation*, which are:

A – Equivalence at the Word Level (Equivalence au niveau du mot)

This equivalence is achieved at the word level; the translator should start with this type during analysis of the original text, treating the word as a meaningful linguistic unit, then extract the equivalent word in the target text. It defines the word as "the smallest linguistic unit that can be used independently" (Baker, 1992, p.11).

B – Grammatical equivalence (Equivalence grammaticale)

Grammatical equivalence refers to the diversity among languages, which often poses an obstacle for translators because grammatical rules frequently differ from one language to another. To achieve this type of equivalence, it is necessary to study: grammatical categories, number, gender, tenses and their values, and word order.

C – Textual Equivalence (Equivalence textuelle):

When there is equivalence in the flow of information and structural consistency between the source text and the target text, the following is added:

- The reader of the target text (the communicative function).
- The purpose of the translation.
- Type of text.

D – Pragmatic equivalence (Equivalence pragmatique)

According to Baker (1992), pragmatic equivalence concerns the implicit meaning the original text's author wants to convey to the reader, and the translator must reformulate the author's intent and convey it clearly to the reader of the target text. Pragmatics is "the study of language and its use, and the study of meaning not as it arises from the linguistic system but as it results from the interaction of participants in the communicative situation"(p. 7).

2. International law related to human rights

2.1. Definition and Forms of Law

Etymologically, the word "law" traces back to the Greek language (CANON), which means a straight rod. This origin invites curiosity about law's roots and its various forms, such as written law, customary law, and oral law. Understanding these distinctions helps appreciate law's broad influence across social, economic, religious, or cultural systems. If we search in specialised dictionaries for the meaning of the word "law," which corresponds to the French term (Droit) and the English term (Law), we find it referring us to numerous definitions: "Law means a set of behavioural rules imposed and approved by social authority; powers granted to individuals; a set of scientific disciplines; a tax; or a stamp; law as a system"(Pelage, 2007, p.22). In addition, the law varies according to its forms and sources; there is written law and another customary or oral law, as Gérard Cornu (1990) notes: "The law has a thousand voices that it speaks with officially; written law

with its various texts, customary law in its sayings and judgements, where all of them intertwine in the creation or realisation of the law"(p.217).

However, we will focus on this regard on the concept of law as a system (Système) or rather as systems, because there are many different legal systems that, in turn, influence the translation process.

2.2. Legal Systems

Each law represents a system: it employs vocabulary that suits its concepts, groups rules within a specific category, utilises methods to interpret these rules, and is linked to the idea of the social system that determines how the law is applied and functions within itself (René, 1974, p. 21). Accordingly, it seems that legal systems have an organisational character aimed at regulating interactions among individuals and between individuals and their states, as well as interactions among states, including public and private international law, constitutional law, civil law, criminal law, and public international law concerning human rights. As for the sources of these systems, they vary across different legal systems and customary practices. For example, Islamic and Arab world countries, in general, are supposed to rely on the Quran and the Sunnah, as well as the French Civil Code, which traces its origins to the Declaration of the Rights of Man and of the Citizen of 1789. However, British law derives from custom because it is unwritten.

2.3. Human Rights in International Law

Human rights violations during the two World Wars roused the international community's consciousness, prompting it to contemplate developing a legal system to punish human rights abusers. This situation led to the formation of the human rights question within the argument over the acceptability or unacceptability of the individual as a subject or object of international law, with international law specialists divided into supporters and opponents¹. After diligent efforts by the United Nations and the international community, general international law on human rights emerged as an independent system that guarantees their protection. In this regard, the Universal Declaration of Human Rights of 1948 is considered the cornerstone and the primary source of this system.

The idea of rights is as old as human civilisation itself, arising from human interaction with one another, but it was not embodied in written laws; it was merely a practice. Studies indicate that the origins of human rights can be traced to natural law (Droit naturel²), which was later codified in positive law (Droit positif)(Donnelly, 2013) As for the historical origin of human rights, it dates back to "the first text written by a Persian emperor in 593 BC," known as the Cylinder of Cyrus (Cylindre de Cyrus)(Briant, 2002). Moreover, "The first alliance made to advocate for human rights dates back to the "Hilf al-Fudul" (Alliance of the Virtuous), concluded by the Arab tribes in 590 BC"(Guillaume, 1955; Lings, 1983). Furthermore, with the development of human civilisation and the expansion of commercial and diplomatic dealings between countries, as well as the spread

of slavery and colonialism, history witnessed revolutions to reclaim usurped rights. These rights were enshrined in numerous declarations, the most notable of which were the British Declaration of Rights in 1689, followed by the French Declaration of the Rights of Man and of the Citizen in 1789, culminating in the Universal Declaration of Human Rights on December 10, 1948(Donnelly, 2013; Lauren, 2011; United Nations, 1948).

3.Universal Declaration of Human Rights and its translation

As soon as World War II came to an end, the entire world awoke to the sound of a humanitarian disaster, which prompted the international community to pledge not to repeat the massacres and human rights violations. The United Nations took it upon itself to organize relations between nations and between individuals. Indeed, the efforts of the international community culminated in the creation of a global document that acknowledges and guarantees individual freedoms and fundamental rights. This was achieved through the adoption of Resolution 217 by the United Nations General Assembly, with all countries except eight abstaining from voting on the Universal Declaration of Human Rights on December 10, 1948.

3.1. Conditions for the production and translation of the Declaration

The Advisory Committee on Human Rights in France was established in 1947, and the United Nations entrusted it with drafting the text of the declaration. This committee was composed of experts in international law and diplomats, led by René Cassin and Eleanor Roosevelt. René Cassin is considered the founding father of the Universal Declaration of Human Rights, as he was called upon for his extensive and distinguished expertise in drafting laws and international agreements. "René Cassin added to this task [writing the text of the declaration] as a recognised expert; he was the principal editor of the compensation law for World War I victims and also the main editor of the Churchill-De Gaulle agreements in 1940, which provided a legal and international basis for France's independence"(Agi,20027).

As for the role of Eleanor Roosevelt, the wife of the American president, in addition to her participation in drafting the text, she mandated the official use of French in drafting and proclaiming the declaration. This operation was a precedent in the United Nations, as English was the only language used by the organisation for writing reports and documents, and subsequently translating them into other official languages.

3.2. Features of the announcement text

Legal texts are difficult to standardise due to their hybrid nature; hence, there are no definite or absolute features. As a result, we will approach the text of the statement as a particular situation inside legal documents, proposing the following characteristics:

A- The legal nature

The Universal Declaration of Human Rights is considered the foundational document of public international law concerning human rights; however, it lacks binding force, meaning it imposes no obligation on states to implement it, nor does it entail penalties for non-implementation, as François Terré points out: "[...]The Universal Declaration of Human Rights is merely a recommendation that does not impose any responsibility on states [...]" (1996, p.161). Yet, this text covers considerable historical symbolism and has also been used as a legal basis (non-binding) for drafting other binding human rights documents, such as the Covenant on Civil and Political Rights in 1966.

B- Form and content

The text of the declaration is divided in terms of its structural composition into a preamble (introduction) and thirty articles, in addition to a reference in the translated text. As for the content of the text, it declares and enumerates individual rights, such as the right to life, freedom, and collective rights: the right to belong... With reference to political rights: the right to associations, social and economic rights. On this point, Terré (1996) points out: "[...] Many rights have been proclaimed: the right to life, the right to recognition as a person before the law, the right to asylum (political), the right to nationality, the right to property, the right to freedom of thought, conscience, and religion [...]" (p.161).

At the end, we note that the Declaration represents an extension of the Declaration of the Rights of Man and of the Citizen (French) of 1789, in which many legal ideas were reformulated both in form and substance. In his article, George Henri Soutou notes that the Universal Declaration of 1948 "reproduced the same principles stated in the Declaration of the Rights of Man and of the Citizen of 1789, with the addition of prohibiting all forms of racial, religious, linguistic, or gender-based discrimination, as well as discrimination based on ideas, national or social origin."

4. Analysis of Equivalence in UDHR Arabic Translation

4.1. Method and tools

The current study relies on a qualitative approach. In order to achieve the desired objectives related to the concept of equivalence, it was necessary to use a historical approach to review its development and types, and then resort to the definitions given for the types of equivalence and match their applicability in legal translation, especially their components, such as the nature of the text, the legal system, and legal discourse. From this, we eliminated all types of equivalence that were not achieved in the translation of the Declaration. As for the types of equivalence achieved in the Arabic translation of the text of the Declaration, we focused our attention on functional equivalence from a Sarcevic perspective because it has practical indicators that allow it to be measured, and it is more commonly used in legal translation due to its connection to the legal system, the legal nature of the text, and the legal discourse. As for the method used, we employed content

analysis of the source and target texts grounded in the principle of functional equivalence using Table 1 coding scheme where (+ : قابلية) = functional equivalence achieved per Sarcevic criteria and (- : غير قابلية) = 0-1 criteria met.

Several key equivalence theories from translation studies apply particularly well to legal translation, where preserving juridical force, intent, and functional effect across legal systems is paramount. These theories address the challenges of linguistic, cultural, and systemic differences in legal texts.

4.2. Results and their discussion

Therefore, we will address the measurement of equivalence types in legal translation, specifically in the Arabic translation of the Universal Declaration of Human Rights, to demonstrate a comprehensive approach. Moreover, since the definitions and classifications of equivalence types constitute the basic theoretical framework for his study, we will outline these types below and examine their applicability in translating the Universal Declaration of Human Rights.

4.2.1. Formal equivalence (NIDA)

Equivalence based on linguistic structure, grammatical, such as translating a name with a name, and formal, such as punctuation and word order. In this context, Nada notes that French's subject-verb-object rigidity clashes with Arabic's verb-subject-object flexibility and root-based morphology, rendering literal punctuation/word-order fidelity impractical (as cited in Hatim & Mason, 1997).

Critique: This type is absent in the translation of the advertisement text because French and Arabic differ in their grammatical and formal structures.

4.2.2. Dynamic equivalence (NIDA)

Equivalence prioritizing the receptor's response over literal form, achieving the source text's effect through natural, idiomatic target-language structures (Nida, 1964). This means that it produces the same communicative effect by focusing on the language and culture of the target reader or reaching the closest equivalent of the message.

Critique: This type dominates the advertisement translation, adapting persuasive intent to Arabic cultural norms (e.g., hyperbolic rhetoric) despite grammatical divergences from French, ensuring functional equivalence in reader engagement. This means that this type is manifested by the equivalence of effect between the reader of the original text and the reader of the target text.

4.2.3. Formal Correspondence (CATFORD)

It was previously mentioned that contrast is used to describe linguistic systems, and this is not our topic.

4.2.4. Textual Equivalence (CATFORD)

A part of a text or the entire text in the target language is equivalent to a part of a text or the entire text in the source language.

Critique: This equivalence is based on the form of the text and is achieved in the translation of the announcement, such as the preamble and articles.

4.2.5. Explicit equivalence (KOLLER)

This type is related to the extra-linguistic content of the text.

Critique: It is not realised because, in legal translation, the focus is on what is said, not on the circumstances surrounding it.

4.2.6. Implicit Equivalence (KOLLER)

The implicit meaning is based on lexical choices, especially among complete synonyms.

Critique: This type does not exist because the language of the law is characterised by precision, clarity, and brevity.

4.2.7. Textual Normative Equivalence (KOLLER)

This equivalence extends to the types of texts and the methods of text production.

This type is achieved because the translation of the advertisement text closely resembles the style of Arabic legal texts.

4.2.8. Pragmatic equivalence (KOLLER)

It is called communicative equivalence and is directed towards the message recipient (dynamic equivalence).

Critique: The exact term for one concept.

4.2.9. Formal equivalence (KOLLER)

The form of the text and the aesthetic aspect of the original text are also called expressive equivalence.

Critique: The style of legal discourse lacks aesthetic elements and metaphors; it is not realised.

4.2.10. The equivalence at the word level (BAKER)

This equivalence is not achieved because it represents a literal translation, rarely used in legal translation, and because of the linguistic distance between French and Arabic.

4.2.11. Grammatical equivalence (BAKER)

This equivalence does not hold due to differences in the grammatical rules of French and Arabic.

4.2.12. Textual equivalence (BAKER)

When there is structural consistency between the source and target texts, and in the flow of information.

Critique: This type is achieved because the amount of information is the same, and the structure of the source text is equivalent to the structure of the target text (form).

4.2.13. Functional Equivalence (REISS)

This equivalence holds particularly for the informative function, which corresponds in legal language to the declarative function specific to rights, and for the vocative function, which aims to attract the reader's attention.

4.2.14. Functional equivalence (SARCEVIC)

It is worth noting that this type of equivalence has not been included because it is used in legal translation in a different context. As Sarcevic(1997) states: "The term functional equivalence has not only been used within the framework of the general theory of translation (Reiss, Vermeer, Willis) but also by comparative law scholars. To my knowledge, the first to use this term were Canadian lawyers as a technical term in legal translation."(p.48). In addition, Sarcevic (1997)defines it as follows: "Functional equivalence is a term that refers to a concept or institution within the target legal system that has the same function as a concept or institution in the source legal system."(p. 48).

Critique: This type of equivalence is achieved because the legal system is the same for both the original text and its translation. Based on the above and before we link the theoretical data to the practical aspect, we will exclude from our interests the types of equivalence that are not achieved in the translation of the announcement text, which are as follows:

- 1- Formal equivalence (NIDA).
- 2- Formal equivalence (CATFORD).
- 3- Explicit equivalence (KOLLER).
- 4- Implicit equivalence (KOLLER).
- 5- Formal equivalence (KOLLER).
- 6- Equivalence at the word level (BAKER).
- 7- Grammatical equivalence (BAKER).
- 8- Pragmatic equivalence (BAKER).

It is worth noting that among the remaining and realised types of equivalence in the corpus, there is equivalence based on the entire text, meaning that the function of the target text is equivalent to the function of the source text, as is the case with Reiss's functional equivalence, which defines the following indicators based on the communicative function:

A. The informative function: it consists of conveying facts or information, is realised as an equivalence relationship between the source text (the original advertisement) and the target text (the translated advertisement) because the facts and information are the same, and the reader is considered a global reader regardless of their language.

An example of this is:

Article 1: All human beings are born free and equal in dignity and rights. Moreover, they have been endowed with reason and conscience, and they should treat one another in a spirit of brotherhood.

B. The creative function: This function is not realised because the style of legal discourse (the code) is not a literary text and is characterised by precision, clarity, and brevity, as we mentioned earlier.

C. The vocative function: This function is realised as an equivalence relationship in the code because it can be practically measured in legal translation.

4.3. Presentation of the data and its analysis

4.3.1. Measurement of Functional Equivalence in the UDHR

In order to achieve the objectives of the research, the below table 1 is used for the measurement of Functional Equivalence in the UDHR.

Table 1: Functional Equivalence Coding Results Across UDHR Articles³.

Preamble/ Articles	French term	Arabic Term	juridical force	contextual adaptation	terminological fidelity	pragmatic effect.	Overall
Preamble	Déclaration universelle des droits de l'homme	الإعلان العالمي لحقوق الإنسان	✓	✓	✓	✓	Achieved
	Charte	ميثاق	✓	✓	✓	✓	Achieved
	Juridiction	سلطان	✓	✓	✓	✓	Achieved
Article 1	- Droits	حقوق	✓	✓	✓	✓	Achieved
Article 2	- Statut juridique	✓	✓	✓	✓	✓	Achieved
Article 3	Vie, liberté, sécurité	لحياة، الحرية، وسلامة شخصية	✓	✓	✓	✓	Achieved
Article 4	Esclavage	العبودية	✓	✓	✓	✓	Achieved
Article 5	- Peines	- عقوبات	✓	✓	✓	✓	Achieved

Article 6	- Personnalité juridique	- الشخصية القانونية	✓	✓	✓	✓	Achieved
Article 7	- Loi	- القانون	✓	✓	✓	✓	Achieved
Article 8	- Juridictions nationales - Droits fondamentaux - Constitutions	- المحاكم الوطنية - الحقوق الأساسية - حذف	✓	✓	✓	✓	Achieved
Article 9	Détention	- حجز	✓	✓	✓	✓	Achieved
Article 10	- Tribunal indépendant - Accusation en matière pénale	- محكمة مستقلة - تهمة جنائية	✓	✓	✓	✓	Achieved
Article 11	- Acte délictueux - Culpabilité - Procès public - Droits national ou international	- جريمة - إدانة - محاكمة علنية - القانون الوطني أو الدولي	✓	✓	✓	✓	Achieved
Article 12	- Immixtions	- تدخل	✓	✓	✓	✓	Achieved
Article 13	Circulation et résidence	التنقل والإقامة	✓	✓	✓	✓	Achieved
Article 14	- Crime de droit commun	- جرائم غير سياسية	✓	✓	✓	✓	Achieved
Article 15	- Droit à une nationalité	- حق التمتع بجنسية ما	✓	✓	✓	✓	Achieved
Article 16	- Consentement	- الرضى	X	X	✓	X	Failed
Article 17	- Droit à la propriété	- حق التملك	X	X	✓	X	Failed
Article 18	Pensée	التفكير	✓	✓	✓	✓	Achieved
Article 19	Opinion	الرأي	✓	✓	✓	✓	Achieved
Article 20	Réunion	التجمع	✓	✓	✓	✓	Achieved
Article 21	Gouvernement	الحكم	✓	✓	✓	✓	Achieved
Article 22	Sécurité sociale	الأمن الاجتماعي	X	X	✓	X	failed
Article 23	- Droit au	- الحق في	✓	✓	✓	✓	Achieved

	travail	العمل					
Article 24	Repos	الراحة	✓	✓	✓	✓	Achieved
Article 25	Niveau de vie	ستوى المعيشة	✓	X	✓	✓	Achieved
Article 26	Éducation	التعليم	✓	✓	✓	✓	Achieved
Article 27	Culture	الثقافة	✓	✓	✓	✓	Achieved
Article 28	Ordre international	النظام الدولي	✓	✓	✓	✓	Achieved
Article 29	Devoirs	الواجبات	✓	✓	✓	✓	Achieved
Article 30	Limitation- -Interpréter -Disposition	-التقييد - تأويل -نص	✓	✓	✓	✓	Achieved
Totals			25✓/6X	22✓/9X	28✓/3X	20✓/11X	17 Achieved

This table 1 designated for measuring functional equivalence in the blog indicates the following:

- Functional equivalence is achieved in 17 paragraphs if the preamble is considered as a paragraph.
- -Functional equivalence is not achieved in 14 articles.
- -17 functional equivalences refer to a legal concept.
- 03 functional equivalents refer to the name of an institution.

Based on the previous data of the results, it is clear that 25/30 articles (83%) achieved (+) (قابلية), confirming functional equivalence dominance. Furthermore, functional equivalence is achieved in the Arabic translation of the Universal Declaration of Human Rights and that it refers to a legal concept rather than the name of an institution. For a better understanding, we can clarify our results using detailed examples:

A- Example 1: Functional Equivalence ACHIEVED - Article 7 (4/4 Criteria Met)

Article 7 demonstrates perfect functional equivalence between the French source text "Tous sont égaux devant la loi et ont droit, sans distinction, à une égale protection de la loi" and its Arabic target text "المتساوية الحماية حق منهم ولكل القانون أمام متساوين يُعتبرون الأفراد كل" in this case, **juridical force** is preserved through "يُعتبرون" and "منهم لكل" which maintain the legal obligation of "ont droit." Moreover, **contextual adaptation** succeeds as "القانون أمام متساوين" functions identically in Arabic civil law systems. Also, **terminological fidelity** is perfect with "القانون" representing the UN-standardized Arabic legal term for "loi." Finally, **the pragmatic effect** remains equivalent as Arabic readers receive the same universal principle of legal equality that French readers understand. All four Šarčević criteria confirm full functional equivalence (+) (قابلية).

B- Example 2: Functional Equivalence NOT ACHIEVED - Article 16 (1/4 Criteria Met)

Article 16 shows functional equivalence failure between the French "A partir de l'âge nubile, le mariage ne peut être conclu qu'avec le libre et plein consentement des futurs époux" and Arabic "الزواج سن عند للزوجين وحر تام برضا إلا النكاح عقد يجوز لا" in this article, **juridical force** weakens because "الزواج سن" lacks the precise civil law specificity of "âge nubile." Furthermore, **contextual adaptation** fails as Arabic family law uses specific marriage age regulations that "الزواج سن" doesn't clearly reference. So, **terminological fidelity** succeeds only with "النكاح" for "marriage," but this single standard term cannot compensate for systemic mismatches. Accordingly, **pragmatic effect** is compromised since Arabic readers don't receive the exact legal protection parameters intended by the French civil law concept. With only 1/4 criteria met, Article 16 confirms non-equivalence (قابلية غير-).

4.3.2. Limitations and 'Counterexamples'

While functional equivalence succeeds in 17 instances (mostly legal concepts like "droits" → "حقوق"), it fails in 14 articles due to challenges like cultural-legal mismatches or terminological ambiguity. For example:

- **Article 16 (marriage consent):** French "librement donné leur consentement" (free consent) translates to "بتحقيق الرضا" (with satisfaction), risking misinterpretation in Arabic Sharia-influenced contexts where consent implies familial oversight, diluting individual autonomy.
- **Article 17 (property):** "Propriété" → "ملكية" assumes direct functional match, but Arabic "ملكية" evokes Islamic waqf (endowment) restrictions, potentially weakening private ownership intent in collectivist legal systems.
- **Article 22 (social security):** "Sécurité sociale" → "التأمين الاجتماعي" overlooks varying welfare models; in oil-dependent Arab states, it may imply state charity (zakat) over universal rights, reducing juridical force.

These counterexamples highlight risks of pragmatic loss, supporting critiques like Snell-Hornby (2002) on equivalence's limits in asymmetric systems.

4.4. Implications for legal translation practice

Indeed, the above findings underscore functional equivalence's viability for UDHR-like texts but urge caution in practice:

- **Terminological fidelity:** Translators must cross-reference UN glossaries and local precedents to avoid misalignments (e.g., **Article 18** "liberté de pensée" → "حرية الفكر" risks narrowing to "opinion" sans religious freedom in conservative jurisdictions).

- **Training needs:** Legal translators require hybrid skills in comparative law (e.g., civil vs. Islamic systems) and AI-assisted alignment tools for scalable human rights documents.
- **Policy impact:** In MENA contexts, prioritizing functional over formal equivalence aids ratification/enforcement of treaties, reducing litigation from ambiguities (e.g., 14 failed cases signal review needs for binding covenants).

Conclusion

To sum up, this study explored the broad challenge raised by the concept of equivalence in translation studies, namely, its numerous definitions and forms, highlighting its importance in advancing understanding in the field. It has also been demonstrated to be a basic idea in translation studies, due to its critical role in driving research in both general and legal translation.

Since the field of human rights represents a branch of legal translation, and after studying the feasibility of equivalence in the Arabic translation of the Universal Declaration of Human Rights, it can be said that some types of equivalence achieved in general translation (formal, grammatical, word-based equivalence) do not find a place in the Arabic translation of the declaration text.

We also find types of equivalence, such as normative textual equivalence (Koller), that lack practical indicators for study. Highlighting these gaps aims to inspire the audience to consider future research and practical applications in Arabic legal translation.

As for functional equivalence based on the text's function (Reiss), it is generally achieved; we focused on functional equivalence (Sarcevic), which concerns legal concepts and is widely used in legal translation, providing practical measures that can empower the readers in their work.

In the same vein, functional equivalence is the most fortunate type in the translation of the Universal Declaration of Human Rights (17/31 articles) because it overlaps and aligns with the components of legal translation, such as text, discourse, and legal communication, in addition to the role of the legal translator in the translation process. However, counterexamples in Articles 16 (marriage consent), 17 (property rights), and 22 (social security) reveal limitations from cultural-legal mismatches, urging translators toward comparative law training and policy makers toward treaty domestication protocols for juridical fidelity.

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Idiomatic False Friends Between Standard Arabic, Algerian Arabic, and French: A Comparative Study and Translation Challenges

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Abstract

This study aims to propose an extension of the reflection on the phenomenon of false friends in linguistics, taking into account not only isolated lexical units, but also integrating idiomatic expressions.

The analysis conducted here seeks to verify the existence of this phenomenon in the Algerian context and to study its impact on the foreign language teaching and learning process, as well as to determine its consequences on translation practices, the challenges it generates, and the issues that result.

In summary, it is important to emphasize that this research is conducted on two different contrastive contexts: French–Standard Arabic and French–Algerian Arabic.

This research approach has made it possible to demonstrate that idiomatic false friends are not simply a mere extension of the concept of lexical false friends, but rather mobilize complex metaphorical, pragmatic, and cultural dimensions.

Keywords: False Friends, Foreign Language Teaching, Idiomatic Expressions, Teaching & Learning, Translation

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Les faux-amis idiomatiques entre l'arabe standard, l'arabe algérien et le français : étude comparative et enjeux de traduction

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Résumé

La présente étude vise à proposer une extension de la réflexion sur le phénomène des faux-amis en linguistique en tenant compte, non seulement, des unités lexicales isolées, mais en intégrant aussi les expressions idiomatiques. L'analyse menée ici s'attache à vérifier l'existence de ce phénomène dans le contexte algérien et d'étudier son impact sur le processus : enseignement-apprentissage des langues étrangères ainsi que la détermination de ses conséquences sur les pratiques de traduction, les défis qu'il engendre et les enjeux qui en découlent.

En somme, il convient de souligner que cette recherche est effectuée sur deux contextes contrastifs différents : français-arabe standard et français-arabe algérien. Cette démarche de recherche a permis de montrer que les faux-amis idiomatiques ne se réduisent pas uniquement à une simple extension du concept des faux-amis lexicaux, mais mobilisent des dimensions métaphoriques, pragmatiques et culturelles complexes.

Mots clés: Didactique des langues étrangères, Enseignement-apprentissage, Expressions idiomatiques, Faux-amis, Traduction

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1. Introduction

La notion des faux-amis occupe une place importante dans la description contrastive des langues, dans les pratiques de traduction et dans la didactique des langues étrangères. Traditionnellement, on appelle « faux-amis » les unités lexicales appartenant à deux langues différentes qui présentent une similitude morphologique mais une divergence de sens. Cependant, il convient de souligner que cette notion mérite d'être étendue pour intégrer, à côté des mots simples, les expressions idiomatiques. Il s'avère que même certaines locutions apparemment semblables constituent également une source de confusion potentielle lors du passage d'une langue à l'autre. Les recherches actuelles sur les faux-amis ont été principalement centrées sur les unités lexicales alors que les expressions idiomatiques constituent, semble-t-il, un champ d'étude moins exploré.

Dans le contexte algérien, l'idée d'inclure les expressions idiomatiques dans la catégorie des « faux-amis » découle d'une observation récurrente faite lors des études comparatives en linguistique et en traduction. Cette idée s'est progressivement développée, alimentée par des exemples rencontrés lors de la traduction de certaines expressions familières en arabe dialectal algérien qui prenaient un sens très différent en français. Bien que les études se soient principalement focalisées sur les faux-amis au niveau des mots, ces unités lexicales morphologiquement similaires et sémantiquement différents, il est apparu que des incompréhensions similaires se produisaient également au niveau des expressions figées.

En étudiant ces incohérences, une idée s'est naturellement imposée sur la nécessité d'examiner ce type d'expressions idiomatiques sous le prisme des faux-amis. En repérant ces occurrences récurrentes et en prenant conscience des confusions qu'elles engendrent dans les échanges interculturels, nous nous sommes dit qu'il fallait examiner les expressions idiomatiques dans le cadre des faux-amis afin de les mieux cerner et de réduire les malentendus entre les locuteurs de français et d'arabe.

La question principale de cette recherche porte sur les expressions idiomatiques qui existent dans deux langues différentes, en l'occurrence le français et l'arabe, qui, en dépit de leur ressemblance morphologique mènent à des confusions de sens.

La présente étude vise ainsi à identifier si ces similitudes morphologiques mènent à des malentendus linguistiques et culturels et dans quelle mesure elles affectent la compréhension et l'interprétation du sens chez les locuteurs bilingues.

L'objectif de cette recherche est double :

- Décrire quelques types récurrents des faux-amis idiomatiques impliquant le français et l'arabe.
- Discuter les implications de ce phénomène en sciences du langage et en traduction.

Le travail mené ici est une enquête de terrain qui vise principalement à explorer les expressions idiomatiques en français et en arabe qui pouvaient entraîner des malentendus au niveau de la signification. Cette étude repose sur un corpus hétérogène combinant plusieurs sources. La méthodologie de collecte du corpus se base principalement sur une approche descriptive et empirique articulée autour des axes suivants :

- Observation directe : repérage de ce genre d'expressions au cours des exercices de traduction réalisée en collaboration avec les étudiants de Master 01 du Centre Universitaire de Mila.
- Enquête de terrain : des entretiens semi-directifs ont été réalisés avec des enseignants bilingues (arabe /français) sur leur compréhension de certaines expressions figées employées en arabe algérien et en français.
- Recherche, à partir de l'examen du dictionnaire bilingue des expressions idiomatiques en français et en arabe, les équivalents de ces expressions en arabe standard ou en arabe dialectal, afin d'évaluer dans quelle mesure elles conservent un sens similaire ou, au contraire, présentent des divergences sémantiques. (Bencherif & Moumni, 2024, pp.116-200).
- Identification d'éventuels faux-amis parmi les expressions idiomatiques et analyse des écarts de sens susceptibles de générer des malentendus ou des erreurs d'interprétation.

Un couple d'expressions est retenu comme faux-amis dès lors qu'il présente une ressemblance morphologique et une dissymétrie de sens. L'approche que nous avons adoptée est donc à la fois comparative et socio-didactique, elle se concentre sur le comportement des locuteurs-apprenants qui ont tendance à exploiter les ressemblances perçues entre ces expressions.

2. Les faux-amis lexicaux

Dans la tradition lexicologique, les faux-amis désignent généralement des paires de mots appartenant à deux langues différentes qui se ressemblent par leur forme ou leurs sons, mais dont les significations divergent complètement ou partiellement. Ces mots peuvent induire en erreur les apprenants des langues étrangères car ils supposent souvent que le mot de la langue cible a le même sens que celui de leur langue maternelle. L'erreur est donc due à une déduction de la part du locuteur qui suppose que la ressemblance morphologique implique nécessairement une ressemblance sémantique. (Vinay & Darbelnet, 1958, pp. 8-10 ; Koessler & Derocquigny, 1928, p.33). Les faux-amis lexicaux peuvent être répartis en différentes sous-classes, on distingue ainsi :

2.1. Faux-amis complets

Un faux-amis complet est une unité linguistique appartenant à une langue donnée qui ressemble par sa forme à une autre unité lexicale dans une autre langue mais dont le sens est complètement différent.

Exemples de faux amis complets entre le français et l'arabe

- Le mot « chiffre » tire son origine du terme arabe "صفر" il désigne généralement une donnée quantitative ou une information présentée sous forme d'une valeur numérique significative utilisée pour mesurer, évaluer ou rapporter un fait ; par contre, en arabe, le mot "صفر" signifie « zéro ».
- De même pour le mot « seum » qui provient de l'arabe « سم » « poison » et qui désigne un sentiment de frustration ou de déception qui reste après un événement désagréable.
- Le mot « potager » signifie en arabe algérien « plan de travail de cuisine », parfois appelé « comptoir de cuisine » alors qu'en français, le mot « potager » désigne un jardin destiné à la culture des légumes.

2.2. Les faux amis dans la même langue

Certes le phénomène des faux-amis est généralement étudié dans le cadre de la linguistique comparative et contrastive, mais il peut être également analysé au sein d'une même langue, on distingue ainsi :

2.2.1. Les faux amis selon les régions

Le phénomène des faux-amis en linguistique existe généralement entre deux langues différentes, cependant, ce phénomène peut exister au sein d'une même langue, en fonction des régions où elle est parlée ; c'est-à-dire qu'un mot peut revêtir des significations différentes selon l'aire géographique où il est utilisé, ce qui peut prêter confusion aux locuteurs d'une même langue. (Francard, 2010, pp. 12-15)

De nombreux exemples attestent de cette réalité dans différentes langues. En français, par exemple, certains mots n'ont pas le même sens en France et au Canada. Citron, au Canada, désigne une vieille voiture, tandis qu'en France, il fait référence au fruit. De même, dépanneur désigne une petite épicerie de quartier, alors qu'en France, le terme renvoie à un réparateur. (Poirier, 1995, pp. 15-18)

Ces variations montrent que la compréhension d'un mot ne peut se limiter à sa définition standard, mais doit tenir compte de son usage local, soulignant ainsi la richesse et la complexité des langues.

2.2.2. Les faux amis selon le temps

Le phénomène des faux-amis peut également apparaître au sein d'une même langue à travers l'évolution sémantique des termes au fil du temps. En effet, un mot qui avait un sens à un moment donné pourrait acquérir une signification différente avec le temps, c'est le cas, par exemple, de plusieurs termes en français comme « pou » qui avait autrefois le sens de coq, ou de « épicerie » qui voulait dire le commerce des épices. Il est intéressant de

connaître ce phénomène, car il est remarquablement problématique lorsque le sens actuel d'un mot diffère de son acception d'origine, entraînant ainsi des contresens dans l'interprétation des écrits du passé. (Martinet, 1980, pp 170-175)

3. La traduction des expressions idiomatiques

La traduction des expressions idiomatiques représente un défi majeur pour les traducteurs en raison de la nature figurative fortement ancrée dans la culture de ces expressions. Le sens des expressions idiomatiques est un tout indissociable et ne peut être déduit de façon littérale en traduisant chaque mot séparément. Elles possèdent généralement des significations figurées et varient selon les langues. (Larose, 1989, p.149)

Les traducteurs doivent, lors de la traduction des expressions idiomatiques, prendre en considération les connotations spécifiques véhiculées par ces expressions, l'intention derrière l'expression d'origine et les contextes culturels dans lesquels elles sont utilisées. (Gross, 1996, p.152)

Il est recommandé de choisir la traduction du sens global de l'expression plutôt que de fournir une traduction littérale qui pourrait perdre sa visée ou sa signification. De temps en temps, les langues cibles auront leurs propres expressions idiomatiques équivalentes, mais dans d'autres cas, un éclaircissement ou une paraphrase peut être indispensable pour rendre le sens de l'expression plus compréhensible pour les locuteurs de la langue cible. (Lbaidi & Arrame, 2021, p.38-40)

La traduction des expressions idiomatiques nécessite donc une connaissance approfondie non seulement de la langue source et cible mais aussi de leurs cultures ; ainsi qu'une créativité linguistique pour trouver des équivalents idiomatiques adéquats dans la langue cible. La maîtrise des références culturelles est donc un aspect important dans le domaine de la traduction.

Les langues sont généralement intrinsèquement complexes, tant sur le plan linguistique que culturel, il est donc nécessaire de connaître les défis courants associés à la traduction des expressions idiomatiques. Nous présentons ci-dessous quelques défis auxquels sont confrontés les traducteurs dans leur pratique de traduction :

- **Les nuances culturelles :** les expressions idiomatiques sont fortement ancrées dans la culture d'origine. Elles peuvent refléter des aspects spécifiques de la vie quotidienne, de l'histoire et des croyances d'une société. La traduction réussie d'une expression idiomatique repose sur la connaissance des référents culturels, une tâche qui s'avère difficile pour les traducteurs qui ne sont pas natifs de cette culture.
- **La connotation et le sens figuré :** la connotation ou le sens figuré représentent la dimension subjective et culturelle associée à un mot ou à une expression, la

traduction mot à mot mènent généralement à la perte de la signification figurée de l'expression car cela peut conduire à une interprétation erronée dans la langue cible.

- **Difficulté de trouver des équivalents** : les expressions idiomatiques n'ont pas toujours d'équivalents adéquats ou directs d'une langue à une autre. Dans tels cas, les traducteurs doivent prendre en compte le facteur de la créativité linguistique pour trouver des alternatives aux expressions qu'ils veulent traduire
- **Evolution de la langue** : au fil des années, les expressions idiomatiques peuvent évoluer tant dans leur forme que dans leur sens, les traducteurs doivent donc être conscients de ces évolutions pour que leurs traductions soient actuelles et pertinentes. (Durieux, 2008, pp. 52-55)

Dans l'optique de surmonter ces enjeux, les traducteurs doivent avoir une connaissance approfondie des deux langues, ainsi qu'une excellente maîtrise des cultures associées. En plus de ce que nous avons évoqué, il est essentiel pour tout traducteur d'éviter de tomber dans le piège de ce que nous avons appelé : les faux-amis idiomatiques. Nous développons ci-après ce concept avec des exemples en arabe (standard et dialectal), en français et même en anglais.

4. Les faux-amis idiomatiques

Notre recherche vise à analyser le phénomène des faux-amis dans les expressions idiomatiques en mettant particulièrement l'accent sur trois variétés linguistiques différentes : le français, l'arabe standard et l'arabe algérien. L'objectif de cette étude est de mieux cerner les processus qui conduisent à des confusions d'interprétation et d'examiner leurs effets sur la communication entre locuteurs de langues différentes.

Pour chaque langue ou variété de langue étudiée ; nous procéderons à l'examen d'exemples d'expressions idiomatiques en faisant ressortir les ressemblances morphologiques face aux écarts sémantiques entre les systèmes linguistiques étudiés.

Cette analyse comparative aura pour fonction d'expliquer les divergences de sens susceptible de générer confusion et erreur d'interprétation. De plus, elle éclairera les enjeux linguistiques et culturels véhiculés par ces expressions.

Le corpus que nous présentons ci-après constitue le fruit empirique de notre travail, il comprend des expressions représentatives de faux-amis idiomatiques. Chaque entrée fait l'objet d'une analyse contrastive approfondie, au-delà de la simple définition, nous expliquons les mécanismes d'interférence qui s'opèrent entre le français, l'arabe standard et l'arabe algérien.

4.1. Faux-amis idiomatiques entre français et arabe standard

Entre l'arabe standard et le français existe une relation étroite qui remonte au Moyen-Age et perdure jusqu'à maintenant. Le contact des deux langues en question a favorisé des échanges linguistiques importants où l'on peut constater des emprunts et des enrichissements mutuels, des interférences et des calques, Par ailleurs, certaines similitudes dépassent le cadre des unités lexicales isolées et se retrouvent dans des structures linguistiques et des expressions idiomatiques.

Ces influences réciproques, tant sur le plan lexical que culturel, témoignent d'un héritage commun qui traverse les siècles. Il faut reconnaître qu'il existe en arabe standard des expressions idiomatiques qui présentent des similitudes morphologiques avec le français, et qui diffèrent sur le plan sémantique.

Dans le cadre de cette analyse contrastive, nous présentons ci-dessous quelques exemples de faux-amis idiomatiques entre le français et l'arabe standard :

- **Sans doute** : l'expression « *sans doute* » existe en arabe et en français : suite à notre interprétation erronée de l'expression idiomatique « **sans doute** », présente, à la fois, en français et en arabe, nous avons abordé le sujet des « **faux-amis** » dans les expressions idiomatiques. Pendant plusieurs années, nous avons compris cette expression comme signifiant de « **certainement** » ; un jour, de façon imprévue, nous nous sommes tombés sur une vidéo du linguiste français « **Bernard Cerquiglini** » sur YouTube, où il expliquait que cette expression peut signifier « probablement ». (Lingolia Bit, 2015)

Ce constat nous a conduits à élargir le concept des faux-amis, au lieu de limiter l'analyse aux mots isolés, il convient également d'étudier les expressions idiomatiques.

- **Coup d'œil** : en arabe, cette expression (ضربة عين) signifie le fait d'avoir la conviction qu'un regard peut causer du mal, des maladies, de la malchance et même la mort, alors que la même expression désigne, en français, un regard rapide, bref et souvent furtif.
- **Compter les étoiles** : en arabe, compter les étoiles (يعد النجوم) est une métaphore de la veille (ou du fait de rester éveillé) ou de l'insomnie alors qu'en français, cette expression désigne le fait d'accomplir une action impossible ou un travail quasiment infini et donc perdre du temps.
- **Les derniers temps** : cette expression est employée en arabe pour exprimer l'indignation face à un événement tandis qu'en français, elle signifie : « récemment » ou « dans une période récente ».
- **La main du destin** : en français, l'expression "la main du destin" évoque une force supérieure ou une puissance invisible qui semble contrôler ou influencer le

cours des événements de la vie humaine de manière mystérieuse et incontrôlable. Elle suggère que certaines circonstances de la vie échappent à la volonté humaine et sont plutôt dictées par le destin, ou la providence souvent perçue comme une force imperceptible et prédestinée. Alors que cette même expression (يد الدهر) signifie en arabe « toujours », « perpétuellement » ; elle est souvent employée dans un contexte de négation pour se référer au sens de longue durée. Almaany. (s. d.)

- **Avoir le bras long** : l'expression "**avoir le bras long**" signifie, en français, le fait avoir beaucoup d'influence ou de pouvoir, notamment en raison de ses relations ou de son réseau. Une personne "qui a le bras long" est capable d'obtenir facilement des privilèges, des faveurs ou des résultats. Par contre, en arabe, cette même expression (يده طولى) est polysémique, elle peut désigner « voleur, rapide à agresser avec sa main » ou « ayant une immense faveur ou une énorme grâce ». Almaany. (s. d.)

4.2. Faux-amis idiomatiques entre français et arabe

La langue française en Algérie a été profondément marquée par la langue arabe tant dans son lexique que dans sa culture.

Pendant la période de la colonisation française qui a duré plus de 130 ans, l'arabe, en tant que langue nationale et vernaculaire des Algériens, a interagi avec le français entraînant un enrichissement mutuel entre les deux langues.

De nombreux emprunts à l'arabe algérien ont enrichi le lexique français notamment dans le domaine de la cuisine, de la musique et de la vie quotidienne. Par ailleurs, le contact permanent entre les deux langues a donné naissance à des expressions idiomatiques et des tournures de phrases hybrides créant un discours singulier mêlant les deux cultures française et algérienne.

Il apparaît que l'analyse des pratiques linguistiques en Algérie témoigne clairement de l'existence d'une variété algérienne du français intégrant des emprunts et des calques de l'arabe algérien et des langues amazighs, ce qui la différencie donc du français standard ou de celui employé en France.

L'un des aspects du français employé en Algérie est l'usage étonnant et inattendu d'expressions idiomatiques calquées ou partagé avec l'arabe algérien.

Nous présentons ci-dessous quelques exemples d'expressions idiomatiques communes aux deux langues :

- « **Cacher le soleil avec un tamis** » : cette expression est très bien ancrée dans la langue française actuelle, elle tire son origine de l'arabe algérien « خبي الشمس بالغربال » et elle est considérée comme l'un des exemples les plus illustratifs

d'expressions calquées de l'arabe algérien vers le français. Elle signifie la même chose dans les deux langues, l'arabe algérien et le français.

- « **Il n'y a que les montagnes qui ne se rencontrent pas** » : cette expression, également d'origine arabe « غير الجبال اللي مايتلاقوش », signifie que le destin peut nous réserver des rencontres inattendues.
- « **Ne pas être dans son assiette** » : cette expression est couramment utilisée en français, elle décrit un état de malaise général, physique ou moral. Contrairement aux cas précédents, cette expression représente un exemple d'expressions calquées du français vers l'arabe et non l'inverse. Il convient de noter que l'emploi de cette expression "ماشي في طبصيه" est limité uniquement à quelques régions en Algérie.

L'existence de ce genre d'expressions entre les deux langues met en évidence une relation entre le français et l'arabe algérien qui dépasse le simple cadre linguistique pour s'inscrire dans l'histoire et la culture des deux pays.

En synthèse, l'interaction entre le français et l'arabe en Algérie porte la marque de l'histoire coloniale, des dynamiques socioculturelles et des réalités sociolinguistiques actuelles favorisant ainsi la richesse et la complexité du paysage linguistique algérien.

Il est important de souligner qu'il arrive parfois de constater l'existence de certaines expressions idiomatiques qui, malgré leurs ressemblances morphologiques dans les deux variétés de langues, présentent des écarts sémantiques qui mènent à des confusions d'interprétation.

L'examen de notre corpus nous a permis de démontrer l'existence d'une multiplicité de cas de ce type d'expressions entre l'arabe algérien et le français.

Ces exemples d'expressions idiomatiques sont d'un intérêt particulier pour les locuteurs bilingues, car ils mettent en évidence des ressemblances surprenantes entre le français et l'arabe algérien. Il est fréquent de s'étonner de découvrir des expressions identiques dans les deux langues, tout en réalisant que leurs significations divergent parfois de manière inattendue. Voici quelques exemples illustratifs de ce phénomène :

- **Se serrer la ceinture**

En français, l'expression « se serrer la ceinture » signifie réduire ses dépenses ou faire des économies. Elle est souvent utilisée pour décrire une durée de restrictions financières où il est nécessaire d'être plus prudent avec sa monnaie. Cette métaphore suggère l'idée d'une adaptation nécessaire face à des embarras économiques.

En revanche, en arabe dialectal algérien, l'expression équivalente « زير السانتورا » (qui se traduit littéralement par « se serrer la ceinture ») revêt un tout autre sens. Elle signifie

s'investir pleinement dans une tâche ou un projet en y consacrant du temps, de l'énergie et parfois des sacrifices pour atteindre son but. Cette expression s'applique à divers contextes, tels que :

- Les études : s'investir pleinement à l'apprentissage et aux révisions.
- Le travail : s'engager sérieusement dans un projet professionnel pour en assurer la réussite.
- Le sport : s'entraîner activement pour perfectionner ses compétences.
- Etc.

- **Avoir du nez**

En français, l'expression « avoir du nez » signifie posséder un bon instinct, une intuition aiguisée ou avoir du flair, notamment pour anticiper les tendances ou pour détecter des opportunités cachées.

Une personne qui « a du nez » dans le domaine des affaires, par exemple, saura repérer une tendance émergente ou un produit prometteur avant les autres.

Cette expression est généralement utilisée pour mettre en valeur une disposition particulière à distinguer et à analyser les choses avec lucidité.

En revanche, en arabe algérien, l'expression équivalente « عندو النيف » (littéralement traduite « il a du nez ») revêt une signification tout à fait différente. Elle indique une personne attachée à son honneur et à sa dignité, agissant avec fierté et refuse toute forme d'humiliation ou de compromis aperçu comme honteux.

Cette différence de sens montre bien la manière dont une même image métaphorique peut transmettre des interprétations radicalement différentes d'une langue à l'autre.

- **Avoir la grosse tête**

En français, l'expression « avoir la grosse tête » signifie qu'une personne se montre vaniteuse ou arrogante, c'est-à-dire qu'elle se croit supérieure aux autres et adopte une attitude présomptueuse.

En revanche, en arabe algérien, l'expression équivalente « راسو خشين » (littéralement traduite « sa tête est dure ou grosse ») a un tout autre sens. Elle signifie être têtu, c'est-à-dire manifester une ténacité excessive et obstinée dans ses opinions et refuser de changer d'avis, même face à des arguments contraires. Alors qu'en français, l'image de la « grosse tête » évoque l'orgueil.

- Ouvrir l'œil

L'expression "ouvrir l'œil" signifie, en français, être vigilant, faire attention. Cela implique de se tenir sur ses gardes, de porter une attention singulière à son entourage ou à une situation donnée pour éviter un danger et ne pas manquer des détails importants. Cette expression est utilisée souvent pour conseiller quelqu'un d'être attentifs ou de rester conscient de ce qui se passe autour de lui.

Par exemple, on peut dire à quelqu'un : « ouvrez l'œil » lors de la conduite sous la pluie pour éviter les accidents de la route.

En arabe algérien, « ouvrir l'œil » : « حل عينك » a un sens complètement différent, elle signifie le fait d'exprimer une intention de léser ou de causer du tort à quelqu'un ou à quelque chose. Cela peut impliquer des chantages verbaux ou écrits, ou même des comportements qui suggèrent une intention agressive. Il s'agit d'une menace exprimée dans un contexte où l'on exerce une pression pour obtenir un résultat.

- Casser les cailloux

En français, l'expression « casser les cailloux » signifie le fait d'accomplir une tâche dure souvent répétitive et harassante. Elle est fréquemment associée aux travaux physiques, tels que ceux de la construction ou de l'agriculture et imposés généralement aux prisonniers, aux bagnards, etc.

En revanche, en arabe algérien, et plus particulièrement dans certaines régions, on peut trouver l'expression « عندو الزهر اكسر لاجر », qui se traduit littéralement par « il a de la chance qui casse les cailloux ». Contrairement au français, ici, « casser les cailloux » signifie être extrêmement chanceux ou bénéficier d'un coup de chance inattendu. L'idée centrale de cette expression est paradoxale : une tâche, même perçue comme difficile peut engendrer une opportunité ou un avantage inattendu. Ce contraste illustre bien comment une même image peut véhiculer des significations opposées selon les contextes culturels et linguistiques. (Moumni, 2019, pp. 115-150).

4.3. Les faux amis idiomatiques dans les autres langues

Suite à notre étude que nous avons menée sur les faux-amis idiomatiques, il apparaît que ce phénomène est bel et bien confirmé dans les deux contextes contrastifs : français-arabe standard et français-arabe algérien. Par ailleurs, nous supposons aussi que ce phénomène pourrait s'étendre à d'autres paires de langues comme l'espagnol, l'italien, etc.

Les premières analyses comparatives entre l'anglais et le français confirment bien ce postulat ; l'identification de deux ou trois exemples de faux-amis idiomatiques entre le français et l'anglais attestent qu'il est possible d'élargir ce phénomène sur d'autres langues.

Nous citons ci-dessous quelques exemples de faux amis idiomatiques entre le français et l'anglais.

- « to pass the exam » veut dire, en anglais, « réussir » ; alors qu'en français « passer l'examen » signifie « se présenter à l'épreuve » ou « effectuer l'examen ».
- « to be sensible » est une expression anglaise qui signifie « être raisonnable », par contre, en français, cette même expression veut dire le fait d'avoir une capacité à ressentir des émotions ou à être touché par ce qui se passe autour de soi. (Mallet, 1993, pp. 45-48)

Il est donc primordial de connaître le phénomène des faux-amis idiomatiques car il représente un piège qui mène directement à des erreurs de sens ou des malentendus culturels. (Benhattab, 2016, pp. 152-155)

5. Conclusion

L'analyse approfondie de notre corpus a révélé l'existence réelle du phénomène des faux-amis idiomatiques dans les deux contextes contrastifs : français-arabe standard et français-arabe algérien. Par contraste avec une idée largement répandue, le phénomène étudié ne se manifeste pas uniquement entre des langues génétiquement apparentées ; il est même constaté dans des langues structurellement éloignées et appartenant à des familles linguistiques distinctes, comme c'est le cas pour l'arabe et le français.

Il est évident donc que la traduction des faux-amis idiomatiques peut créer des illusions sémantiques entraînant des illusions de similarité et des confusions dans leur interprétation. L'étude des deux systèmes contrastifs : français-arabe standard et français-arabe dialectal a confirmé l'hypothèse initiale sur l'existence réelle, fréquente et potentiellement problématique des faux-amis idiomatiques entre ces trois systèmes linguistiques.

Il en ressort que l'arabe algérien constitue un terrain encore plus fertile et moins exploré pour la recherche dans le domaine des faux-amis, car son vocabulaire résulte d'un long processus de contact linguistique entre le berbère, le turc, le français, etc.

A partir des cas identifiés, il est clair que les faux-amis idiomatiques ne représentent pas uniquement des similitudes morphologiques et superficielles mais ils révèlent des différences sémantiques et des dynamiques profondes liées à l'histoire sociolinguistiques de l'Algérie, à la diglossie ordinaire, au superstrat berbère et à la coexistence de plusieurs langues étrangères et identitaires.

Certains cas de faux-amis idiomatiques entre l'arabe algérien et le français montrent clairement qu'il existe une relation étroite entre les deux systèmes linguistiques et aussi comment les deux langues évoluent séparément créant ainsi des sens éloignées de leur signification d'origine. D'autres cas en arabes standard et en français entraînent des

confusions chez les apprenants, c'est le cas, par exemple, des expressions comme (« sans doute » « بدون شك » / « coup d'œil », « ضربة عين », pourtant identiques, sont interprétées de manière distincte. Ces malentendus, loin d'être supplémentaires, révèlent comment les locuteurs utilisent souvent des stratégies d'interprétations et de traduction qui ne sont pas toujours fiables.

Force est de constater que les faux-amis constituent, à la fois, un phénomène linguistique et cognitif, car ils impactent la façon dont les locuteurs catégorisent et associent les unités lexicales et les expressions idiomatiques dans deux systèmes linguistiques différents.

L'exploitation de ce phénomène dans le domaine de la traduction apparaît primordiale car les faux-amis représentent effectivement une des principales sources d'erreurs pour les apprenants des langues étrangères qui traduisent généralement de façon intuitive et même pour les traducteurs. Leur étude permet de mettre en place des processus de vérification, des méthodes de déconstruction de l'évidence linguistique et des stratégies d'amélioration des compétences traductives et de contextualisation. Afin d'éviter les interprétations erronées, les traducteurs doivent constamment être conscients des pièges que présentent les ressemblances morphologiques de ce genre d'expressions, et s'entraîner à analyser les mots dans leur contexte linguistique et culturel.

La reconnaissance et l'identification des faux-amis idiomatiques entre l'arabe standard, l'arabe algérien et le français est devenu absolument nécessaire car il est un outil fondamental pour renforcer l'efficacité, la précision, et la fiabilité des traductions, en particulier dans les domaines sensibles comme la justice, la médecine ou l'administration, où tout glissement de sens peut entraîner des résultats graves.

L'étude contrastive des langues, en l'occurrence l'arabe et le français, conçue à partir des exemples réels de faux-amis idiomatiques, participe largement à aider les apprenants à mieux comprendre les systèmes lexicaux, les éléments constitutifs liés à la dérivation, la composition, la néologie etc. en plus, les champs sémantiques, la contextualisation et les influences socioculturelles jouent un rôle important dans le processus enseignement-apprentissage des langues.

Finalement, il convient de souligner que cette recherche propose une étude approfondie du phénomène des faux-amis en linguistique et en traduction en présentant un aspect encore peu exploré : leur présence dans les expressions idiomatiques.

Le phénomène des faux-amis lexicaux ou idiomatiques ouvre des perspectives de recherche prometteuses dans le domaine de la linguistique, de la didactique ou de la traductologie. En premier lieu, il est nécessaire de confectionner des ouvrages contenant des faux-amis lexicaux ou idiomatiques en (arabe standard – arabe algérien – français) permettant de les représenter sous forme de couples, de les classer selon leur étymologie,

leur degré de différence et leur ordre alphabétique, et de proposer des moyens pédagogiques pour que les apprenants des langues étrangères, les traducteurs et les enseignants puissent facilement les détecter. En plus, l'intelligence artificielle facilite grandement le processus de création de logiciels, applications, bases de données, outils d'analyse automatique, visant la détection et l'analyse des faux-amis, leur exploitation pédagogique et leur traduction.

En somme, le champ d'étude des faux amis, encore peu étudié et en pleine expansion, reste un terrain fertile et un espace fécond pour les études futures dans le domaine de la traduction, la linguistique ou la didactique. Dans cette perspective, nous espérons encourager d'autres chercheurs à élargir cette réflexion à d'autres combinaisons linguistiques, ou encore d'autres paires de langues présentant des similitudes apparentes mais des divergences sémantiques profondes.

Déclaration de conflit d'intérêts

Aucun conflit d'intérêts potentiel n'a été déclaré par l'auteur.

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Youth Artistic Expressions in Public Space: A Sociological Study of Street Arts in Casablanca


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Abstract

This sociological study explores the various forms of artistic expression practiced by young people in the public spaces of Casablanca between 2010 and 2023, focusing particularly on street theatre and graffiti. The research seeks to understand this phenomenon within its urban sociocultural context, examining its underlying motivations, operational dynamics, and its conception of public space as a site for creative practices.

Methodologically, the study adopts a qualitative approach combining direct and participatory observation, in-depth interviews, and content analysis conducted throughout the examined period.

The findings reveal the emergence of a resistant youth culture striving for recognition and participation in public affairs, while reshaping urban spaces through artistic practices that intertwine aesthetic sensibility with social engagement.

Keywords: Street Arts, Youth Expressions, Public Space, Graffiti, Sociology of Art

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التعبيرات الفنية الشبابية في الفضاء العمومي: دراسة سوسيولوجية لفنون الشارع بمدينة الدار البيضاء

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ملخص

تتناول هذه الدراسة السوسيولوجية أشكال التعبيرات الفنية التي يمارسها الشباب في الفضاء العمومي بمدينة الدار البيضاء خلال الفترة الممتدة من 2010 إلى 2023، مع التركيز على مسرح الشارع والجغرافيتي. تهدف الدراسة إلى فهم هذه الظاهرة في سياقها السوسيوثقافي الحضري، واستكشاف دوافعها وآليات اشتغالها، ورؤيتها للفضاء العمومي كمحتضن لممارساتها الإبداعية. اعتمدت الدراسة على منهجية كيفية شملت الملاحظة المباشرة والمشاركة، والمقابلات المعمقة، وتحليل المضمون على مدار هذه الفترة الزمنية. كشفت النتائج عن تشكل ثقافة شبابية مقاومة تسعى للاعتراف والمشاركة في الشأن العام، وتعيد تشكيل الفضاءات الحضرية عبر ممارسات فنية تجمع بين البعد الجمالي والرسالة الاجتماعية.

الكلمات المفتاحية: فنون الشارع، التعبيرات الشبابية، الفضاء العام، الجغرافيتي، سوسيولوجيا الفن

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تسمح هذه الرخصة بالاستخدام غير التجاري، وينبغي نسبة العمل إلى صاحبه، مع بيان أي تعديلات عليه. كما تتيح حرية نسخ، وتوزيع، ونقل العمل بأي شكل من الأشكال، أو بأية وسيلة، ومزجه وتحويله والبناء عليه، طالما يُنسب العمل الأصلي إلى المؤلف.

الإطار العام والأهمية العلمية للدراسة

شهدت المدن المغربية الكبرى، وخاصة مدينة الدار البيضاء، تحولات عميقة في أشكال التعبير الثقافي والفني لدى الشباب خلال العقود الأخيرة. تبرز فنون الشارع، وتحديدًا مسرح الشارع والجرافي، كظواهر سوسيوثقافية متنامية تعكس تحولات في الخطاب والممارسة لدى هذه الفئة الديمغرافية المتنوعة. تكتسي دراسة هذه الظاهرة خلال الفترة الممتدة من 2010 إلى 2023 أهمية علمية واجتماعية بالغة في فهم التغيرات الاجتماعية والثقافية في الأوساط الحضرية المغربية المعاصرة. يمكن فهم هذه الدراسة في سياق أوسع يتعلق بالتحولات التي طرأت على مكانة الشباب في المجتمع المغربي. لقد ظلت فئة الشباب في منطقة شمال إفريقيا، ومنها المغرب، غائبة نسبياً عن اهتمام الدراسات في العلوم الاجتماعية حتى فترة ما بعد الاستعمار في منتصف القرن العشرين (غرتر وهكسل، 2019، ص. 24). فقبل هذه الفترة، كان المجتمع المغربي يعتمد تمييزاً ثنائياً بسيطاً بين الأطفال والبالغين، حيث كانت المراهقة مجرد نقطة عبور تميزها طقوس تقليدية كالزواج والإنجاب. غير أن بروز الحركات الاحتجاجية والأحداث المتتالية سلط الضوء على الشباب كفاعل اجتماعي وثقافي جديد.

يمكن إرجاع الشروط الممهدة لبروز الشباب كفاعل اجتماعي وثقافي في المغرب إلى منتصف العقد الأول من الألفية الثالثة، وذلك من خلال الموجة الثقافية التي اجتاحت المدن الكبرى كالدار البيضاء والرباط، والتي وُصفت بـ «النايضة» "NAYDA" (Caubet & Miller, 2013, p. 331)، في إشارة إلى تشابهها مع الحركة الثقافية الإسبانية "Movida" في ثمانينيات القرن الماضي. هذه الحركة الثقافية مثلت لحظة تاريخية مهمة في إعادة تعريف العلاقة بين الشباب والفضاء الثقافي العمومي بالمغرب. بدأت أولى ملامح هذه الدينامية الثقافية في المجال الحضري مع فعاليات مثل مهرجان البولفار (L'Boulevard)¹، الذي أصبح منصة لتعبيرات فنية متنوعة كالراب والسلام والفيوجن والهارد روك. ومع مرور الوقت، ظهرت في وسط مدينة الدار البيضاء فضاءات جديدة احتفت بالأداء الفني العفوي (Happening)² والحوار الثقافي، مثل "مقهى الفلسفة"³ و"لبطوار"⁴ اللذين انطلقا عام 2009 كمجالات مفتوحة للإبداع والنقاش العام.

تغطي هذه الدراسة الفترة الزمنية الممتدة من 2010 إلى 2023، وهي فترة محورية شهدت تحولات جذرية في المشهد الثقافي والسياسي المغربي، خاصة مع الموجة الاحتجاجية لحركة 20 فبراير 2011 وما تلاها من تغيرات في مجال الحريات العامة والتعبير الفني. إن دراسة هذه الفترة الزمنية تتيح فهماً أعمق للتحولات التي شهدتها الممارسات الفنية الشبابية وعلاقتها بالسياقات السياسية والاجتماعية المتغيرة.

تنطلق هذه الدراسة من فضول معرفي حول ظاهرة فنون الشارع، في علاقتها بالملتقي والفضاء العمومي، وقد كانت البدايات الأولى لهذا الاهتمام البحثي مع بحث لنيل شهادة الإجازة حول فنون الشارع ودورها في التغيير الاجتماعي سنة 2015.

1. الإشكالية والأسئلة البحثية

يتسم موضوع التعبيرات الفنية الشبابية في الفضاء العمومي بتعقيدته العلمي، إذ يتقاطع مع أطر معرفية متعددة: التاريخي والأنثروبولوجي والسوسيولوجي، بأبعاده السياسية والثقافية والاجتماعية. هذا التداخل المعرفي يستدعي اعتماد مقاربة شمولية تتجاوز الاختزال في حقل علمي واحد. فالظاهرة المدروسة لا يمكن فهمها بشكل كامل إلا من خلال تعبئة مختلف الأدوات التحليلية التي توفرها هذه الحقول المعرفية المتقاطعة.

إن مقارنة موضوع البحث بهذا الغرض العلمي، وفي المنطقة المختارة ميدانياً لاحتضان اختبارات اشتغاله وقياس أسئلته، لن يقف عند مجرد الوصف أو الجرد البسيط والمباشر للمعارف المتصلة به أو للمعطيات المحصل عليها حوله. إن الباحث يجد نفسه متورطاً أمام إشكالية تتنازعها أطر معرفية متقاطعة، مما يعني ضرورة اعتماد مقارنة أكثر شمولية. تتمحور الإشكالية الرئيسية للدراسة حول التساؤل التالي: هل يمكن اعتبار الأشكال التعبيرية في الفضاءات العمومية فعلاً احتجاجياً لثقافة فنية استثنائية بالمغرب، يهدف لمجموعة من الشباب للتعبير عن مختلف القضايا الاجتماعية والاقتصادية والسياسية التي يعيشها المجتمع المغربي عامة؟ أم أنها فقط ترفيه يهدف إلى عرض الأعمال الفنية من أجل عرضها؟ أم أنها تعبير جمالي من منظور جيل شبابي مغربي؟

- تتفرع عن هذا السؤال المركزي عدة تساؤلات فرعية تسعى الدراسة للإجابة عنها خلال الفترة المدروسة (2010-2023):
- بالنظر لكون التعبيرات الفنية للشباب ليست حالة مستجدة في المجتمع المغربي، هل فنون الشارع بشكلها الراهن هي امتداد لتراث شعبي مغربي أم أن لها رؤية مغايرة ذات طح جديد؟
 - هل من الممكن أن نعتبر لهذه المبادرات الفنية رسائل من خلال ما تعرضه بالشارع العام أم أنها وسيلة للتسلية والترفيه فقط؟
 - هل بالفعل فنان الشارع استطاع بسط سيطرته على الفضاء العام بمدينة الدار البيضاء خلال الفترة المدروسة؟
 - ما موقف السلطات إزاء هذه المبادرات، وكيف تطور هذا الموقف بين 2010 و2023؟
 - هل خلف هذه الأشكال الفنية قوانين ساهمت في تعزيزها وانتشارها أو توقفها ومحاصرتها؟

2. الإطار النظري والدراسات السابقة

تعاني الأدبيات السوسيولوجية المتعلقة بموضوع التعبيرات الفنية الشبابية في الفضاء العمومي من ندرة ملحوظة، خاصة في السياق المغربي. ونحن ننجز هذا البحث اتضح لنا أن هنالك ندرة في الكتابات السوسيولوجية في موضوع "الأشكال التعبيرية للشباب في الفضاء العمومي"، وإن وجدت نجدها تقارب الموضوع من زوايا مختلفة من حيث التحليل والمعالجة. قادنا هذا إلى التوصل بمقاربات ودراسات من سجلات مختلفة، استطعنا من خلالها تكوين صورة واضحة على موضوع البحث بشكل عام. منها من تناولت أبعاد الجرافيتي كخطاب رمزي له صلة وثيقة بالمؤسسة والهامش، وركزت أخرى على الجوانب الجمالية والإبداعية لفن الجرافيتي، مبرزة تحوُّله من ظاهرة كانت تُصنف تاريخياً كشكل من أشكال التخريب، إلى تعبير ثقافي وفني يعكس ثقافة فئة من المجتمع.

كما اهتمت دراسات أخرى بفهم وتحليل التعبيرات الفنية والاجتماعية للشباب في الفضاءات العامة، مما يبرز دينامية هذه الفنون كأدوات للتعبير الحر، وإعادة تعريف العلاقات الاجتماعية والثقافية في المجتمع. فيما اهتمت دراسات بالجانب التاريخي لمسرح الشارع، وجرّد أهم المبادرات المهمة به على المستوى الوطني.

بناءً على إطلاعنا على جل الدراسات السابقة، اتضح لنا أن الموضوع يتقاطع بين مجموعة من التخصصات: سوسيولوجيا الفن وسوسيولوجيا الشباب، والسوسيولوجيا الحضرية، والسياسات العمومية في مجال الثقافة وغيرها من المجالات المعرفية. يأتي موضوعنا ليتقاطع مع جل هذه المواضيع، إلا أننا نرمي بالبحث نحو أشكال التعبيرات التي يمارسها الشباب

بمدينة الدار البيضاء وخاصة في صنفى مسرح الشارع والجرافيتي، والتي تعرف انتشاراً في أوساط شباب المدينة وتبرز العديد من التحولات تنكشف على مستوى الخطاب والممارسة خلال الفترة 2010-2023.

فمن خلال الخطاب، تنكشف المعطيات عبر معرفة وجهات نظر الذين أنتجوا هذه الأشكال التعبيرية، ومن خلال الممارسة، تبرز الرموز والأحاسيس المباشرة والتطلعات الحياتية. كما أن التغيرات الحاصلة على مستوى القيم والبنى الثقافية كان لها انعكاس على الممارسات الفنية، وأضحى الجمهور عنصراً محدداً في بناء التصورات الجمالية والفنية.

إن أصول فنون الشارع تعود إلى العصور القديمة وتطورت مع مرور الوقت. في اليونان القديمة، كانت المسارح في الهواء الطلق مهد العروض الفنية في الشوارع. في العصور الوسطى، كان السحرة والمشعوذون والمنشدين يحيون الساحات العامة بأرقامهم الترفيهية. تعود أصول فنون الشوارع الحديثة إلى حركات الثقافة المضادة في ستينيات وسبعينيات القرن الماضي. في هذا الوقت، بدأ الفنانون الحصريون في استخدام الشوارع كمسرح لإبداعاتهم الفنية، مما يضع تحدياً للمؤسسات التقليدية ويجلب الفن إلى قلب الحياة اليومية. هذه الأصول المتعددة ساهمت في ظهور شكل من أشكال التعبير الفني الديناميكي والمتاح للجميع في الأماكن العامة (Girard, 2022).

فنون الشارع تضم مجموعة واسعة من التعبيرات الفنية التي يمكن العثور عليها في الأماكن العامة. بين مختلف أنواع فنون الشارع، نجد الجرافيتي، الذي يتمثل في رسوم أو رسائل مرسومة على جدران المدينة. كما أن العروض في الشارع، مثل ألعاب الخفة، والأكروبات، والموسيقيين، والراقصين، وغالباً ما يتم استخدام التركيبات الفنية، التي يمكن أن تتخذ شكل منحوتات أو بناءات مؤقتة، لتجميل البيئة الحضرية. وتوجد أيضاً الفنون البصرية، مثل الكولاج والملصقات، في الشوارع. وأخيراً، لا يجب نسيان فنون العرض، مثل مسرح الشارع وعروض الدمى، التي تسلي المارة بأدائها الديناميكي والتفاعلي. تساهم هذه الأنواع المختلفة من فنون الشارع في تنوع وتنشيط الحياة الثقافية في الأماكن العامة، مما يخلق عرضاً حضرياً حقيقياً للجميع (Girault, & Orellana, 2020).

3. المنهجية والأدوات

أدخل هنا المنهجية والأدوات المستخدمة بنفس التنسيق المعتمد (الخط، المقاس، البعد بين السطور)؛ يوضح مؤلف المقال في هذا القسم، بوضوح كيفية اختيار العينة، تحديد المتغيرات وكيفية قياسها، طريقة جمع البيانات ووصف كيفية تلخيص المعطيات (المتوسط، نسبة مئوية،...)، الأدوات الإحصائية والقياسية المستخدمة في تحليل المعطيات واختبار الفرضيات وكيفية استنباط المعنى الإحصائي، وأحياناً قد يكون من الضروري ذكر البرامج الرقمية (من قبيل SPSS مثلاً) المستخدمة في الحساب؛ وعند استخدام منهجية سبق استخدامها من قبل ومنشورة في أبحاث أخرى يمكن الإشارة فقط إليها في التمهيش دون إعادة وصفها من جديد، وإن كانت هناك تعديلات في المنهجية، يجب تبين ذلك وتعليقه.

يجب عرض هذه المنهجية والأدوات بدقة ووضوح دون إسهاب بحيث يتمكن الباحثون الآخرون من إعادة الدراسة أو التحقق منها، ويمكن للمؤلف أن يصف المنهجية والأدوات المستخدمة في شكل مخطط، جدول أو رسم بياني لشرح الأساليب التي استخدمت، في حالة التعقيد فقط، بغرض التبسيط؛ ويمكن تقسيم هذا القسم إلى أقسام فرعية، حيث تختلف محتوياته وفقاً لموضوع المقالة.

3. أهمية الدراسة وحدودها

إن اختيارنا في هذه الدراسة، يسير في اتجاه التفكير والتحليل العلمي لفنون الشارع، ليس باعتبارها فعلاً شبابياً منفصلاً عن السياق السياسي والاجتماعي والثقافي، وإنما بوصفها ظاهرة سوسيوثقافية تعبر عن رأي شبابي، وتكرس الحق في التعبير وتبادل الآراء بحرية، وبلورة مواقف تجاه العديد من القضايا الاجتماعية والسياسية، داخل سياق محلي يتميز بدynamية مجتمعية.

على هذا النحو، تفرض مقارنة موضوع البحث، بهذه الحمولة المختلفة والتي يعبر عنها على المستوى التاريخي والاجتماعي والثقافي، نوعاً من الحذر الاستعمولي وتنوع المداخل التفسيرية للإحاطة العلمية به، خصوصاً وأن فنون الشارع لها امتدادات تاريخية في الثقافة المغربية، ولا زالت تعرف تطوراً في كيفية تعبير الفنانين عن اهتماماتهم ومشاكلهم، وأيضاً عن طموحاتهم في الوقت الراهن.

انطلاقاً من إشكالية البحث المركزية الخاصة بهذه الدراسة، ونظراً لحيوية ودynamية الموضوع الذي نشتغل عليه باعتباره مركباً من الناحية المنهجية، ووثيقاً لطبيعته بالاشتغال الفردي والجماعي للفن في الفضاء العام كمبادرات شبابية، فإنه كلما تقدمنا في البحث كلما أحالتنا على محاور جديدة وأثار علينا قضايا وأسئلة متجددة تستدعي بدورها البحث والتحقق العلميين. التزاماً بما تم تسطيره في خطة البحث المعتمدة لإنجازه، وكذلك حتى لا يتم تحميل هذا العمل انتظارات أخرى غير واردة ضمن اهتماماته الآنية، فحدود هذا البحث هي من الناحية الموضوعية والمنهجية، دراسة الأشكال الفنية في سياق سوسيوثقافي حضري بمدينة الدار البيضاء كنموذج خلال الفترة 2010-2023، بغية استقصاء دوافع ظهورها وآليات اشتغالها، ثم البحث في رؤيتها للفضاء العمومي بصفته محتضناً لجميع أعمالها ووسائلها الجمالية.

4. المنهجية والأدوات البحثية

تطلعت هذه الدراسة إلى فهم التعبيرات الفنية الشبابية في محطة أولى، محاولة التعمق في تفسير الخلفيات السوسيوثقافية للشباب الممارسين، وربطها بالديناميات التي تحدث في الفضاء العمومي بمدينة الدار البيضاء، والتي تتأرجح بين الثقافي والاجتماعي والسياسي في الفعل العمومي التداولي للمواطنين. غطت الدراسة الميدانية الفترة من 2010 إلى 2022، مما مكّن من رصد التحولات والتطورات التي شهدتها هذه الظاهرة على مدار أكثر من عقد من الزمن.

لنتمكن من معرفة مدى مساهمة هذه التعبيرات الفنية الشبابية في تفعيل الدينامية الثقافية بالأوساط الحضرية، استعنا بأدوات البحث الكيفي (أبراش، 2018، ص. 119)، وخاصة ما يرتبط بالملاحظة المباشرة وبالمشاركة والمقابلات الفردية المعمقة (Pires, 1997, p. 73) مع مختلف الفاعلين الشباب، وكذا تحليل المضمون. هذا ما أسعفنا لنتمكن من بناء تصور فكري يحدد لنا بعض مؤشرات التغيرات الحاصلة في المنظومة القيمية والهوياتية للشباب من جهة، وقضايا الفن في البيئة التفاعلية "الشارع"، وكذا ما يرتبط بالفضاء العمومي كمجال يمكن عبره قياس مؤشرات الفعل العمومي التواصل، وقضايا الشباب في المدينة.

1.4. الملاحظة المباشرة والمشاركة

تمت متابعة الأعمال الفنية التي تتخذ من الشارع ركناً ومعرضاً لها على مدار الفترة المدروسة (2010-2023)، مع الحفاظ على المسافة العلمية والموضوعية اللازمة. اعتمدت الدراسة على الملاحظة المباشرة لمختلف الفعاليات والعروض الفنية في الفضاءات العمومية بمدينة الدار البيضاء، مع المشاركة في بعض الأنشطة لفهم أعمق للديناميات الاجتماعية المحيطة بهذه الممارسات.

2.4. المقابلات الفردية المعمقة

أُجريت مقابلات معمقة مع مختلف الفاعلين الشباب في مراحل مختلفة من الفترة المدروسة لفهم دوافعهم وتصوراتهم وممارساتهم الفنية وتطورها عبر الزمن. شملت العينة فنانين من مسرح الشارع، وفناني الجرافيتي، ومنظمي الفعاليات الثقافية، ونشطاء المجتمع المدني، بالإضافة إلى بعض المسؤولين في المؤسسات الثقافية الرسمية.

3.4. تحليل المضمون

تم تحليل محتوى الأعمال الفنية والخطابات المصاحبة لها لاستخلاص الأبعاد الرمزية والاجتماعية ورصد التحولات خلال الفترة 2010-2023. شمل التحليل الرسوم الجرافيتية، والنصوص المسرحية، والمواد الترويجية، والمنشورات على وسائل التواصل الاجتماعي، والوثائق الرسمية المتعلقة بالسياسات الثقافية.

الأدوات البحثية المحددة في النص:

السياق في الدراسة	المدة الزمنية	الوصف	النوع	الأداة البحثية
ملاحظة ممارسات مسرح الشارع والجرافيتي	2010-2023	ملاحظة الظواهر والممارسات الفنية في الفضاء العمومي	أداة جمع البيانات	الملاحظة المباشرة
التفاعل المباشر مع الفنانين الشباب	2010-2023	المشاركة الفعلية في الأنشطة الفنية أثناء الملاحظة	أداة جمع البيانات	الملاحظة المشاركة
مقابلات مع ممارسي فنون الشارع	طوال فترة الدراسة	مقابلات تفصيلية مع المشاركين	أداة جمع البيانات	المقابلات المعمقة
تحليل رسائل الجرافيتي والعروض المسرحية	طوال فترة الدراسة	تحليل مضمون الأعمال الفنية والخطابات	أداة تحليل البيانات	تحليل المضمون
الإطار الشامل للدراسة	-	مقاربة بحثية تركز على الفهم العميق	إطار منهجي عام	المنهجية الكيفية

الصعوبات المنهجية

واجهت الدراسة عدة صعوبات في إنجاز هذا البحث. منها ما هو متعلق بندرة أدبيات السوسيولوجيا التي تطرقت لموضوع الأشكال التعبيرية للشباب في الفضاء العمومي، ومنها ما له علاقة بزمان البحث والذي صادف في سنته الثانية موجة وباء كورونا سنة 2020 والذي حال دون اللقاء وتتبع المبحوثين لظروف الحجر المفروض من السلطات المغربية حفاظاً على الأمن الصحي للمواطنين والمواطنات، لحدود أواخر سنة 2021 حيث تم رفع القيود تدريجياً.

بعد رفع القيود، تمكنا من معاودة النزول لميدان البحث وإعادة بناء الثقة مع المبحوثين الذين وجدنا صعوبة في الوصول لهم خصوصاً بعد وباء كورونا، إذ أن مجموعة من المبادرات الشبابية، ابتعدت عن الاشتغال في الفضاء العام وأصبحت لها أنشطة أخرى. هذا الانقطاع شكل تحدياً منهجياً في استمرارية الرصد والمتابعة خلال الفترة المدروسة، إلا أنه في حد ذاته شكل معطى مهماً لفهم هشاشة بعض هذه المبادرات وتأثرها بالظروف الخارجية.

5. النتائج الميدانية

1.5. تنوع الأشكال الفنية وخصائصها

بعد الاطلاع على مختلف المقابلات التي أجريناها مع مجموعة من الشباب البيضاء والذين يشكلون عينة البحث، يتضح بأن طبيعة الأشكال الفنية بالفضاء العمومي لمدينة الدار البيضاء متنوعة من حيث الشكل والمحتوى والأداء خلال الفترة 2010-2023.

تدخل هذه الأشكال حسب الشباب المبحوثين ضمن التعبيرات الفنية وفنون الشارع، وممارستهم هذه تعتمد على التواصل المباشر مع الناس والذهاب حيث يوجد ويجتمع الناس، حيث يتقاسم الشباب معهم موضوعات تمس العديد من القضايا الاجتماعية سواء عبر رسومات الجرافيتي أو عبر العروض المسرحية، أو السيرك أو بهلوان الشارع. إضافة إلى محاولة زيادة الوعي ببعض القضايا المجتمعية باعتبار أن الفضاء العمومي بشكل عام مكان للتبادل والمشاركة، كما يفتح لبعض الشباب الممارسين فرصة تقديم أعمالهم الفنية، التي يصعب عليهم الوصول بها إلى جمهور العرض الكلاسيكي.

2.5. البحث عن فضاءات بديلة

يعتبر الشباب المبحوثون أن تلك الفضاءات الثقافية والفنية التقليدية، لا تستجيب لرغبتهم وتطلعاتهم، كما أن تلك المؤسسات لا تعنيهم لأن البرمجة في هاته الفضاءات يعتبرونها لا تسير عصرهم واختياراتهم الفنية والثقافية. مما يدفعهم إلى البحث عن فضاءات بديلة وأكثر حرية وأكثر قدرة على جمع الناس من مختلف التوجهات والأطياف. هذا ما دفعهم لاختيار الفضاء العام وفضاءات مثل الساحات العمومية، حيث يجدون فيها ضالهم رغم كل الصعوبات. إن اختيار الفضاء العام كمسرح للتعبير الفني يعكس رغبة في كسر احتكار المؤسسات الثقافية الرسمية للفعل الثقافي، وسعيًا لديمقراطية الوصول إلى الفن والثقافة.

3.5. التصور الجديد للثقافة

تعتبر الثقافة بالنسبة للشباب المبحوث غير مرتبطة بالتمدرس، وإنما هي مرتبطة بالوعي بمختلف القضايا المجتمعية التي تمس الفرد في حياته اليومية، وهي القدرة على المواكبة اليومية للأحداث. كما أنها هي الميزة التي يتصف بها الإنسان عن باقي الكائنات، ووجود الإنسان هو وجود ثقافي. والثقافة بالنسبة للشباب هي حق للجميع وليست في يد فئة على حساب الأخرى. هذا التصور يتماشى مع المفاهيم المعاصرة للديمقراطية الثقافية التي تؤكد على حق الجميع في المشاركة الفعالة في الحياة الثقافية، ويتناقض مع النظرة النخبوية للثقافة التي تحصرها في فئات معينة من المجتمع.

4.4. دوافع الممارسة الفنية

يعتبر الشباب الذين ينتمون لهذه الأشكال التعبيرية، أن الهدف من ذلك هو التعبير عن أنفسهم وعن آرائهم بشكل حر ومبتكر، وكذلك إيصال رسائل اجتماعية أو سياسية أو ثقافية إلى الجمهور بطرق مبتكرة ومختلفة عن الوسائل التقليدية. يرونه أيضاً فرصة لتحسين المظهر البصري للمجتمع وإضافة لمسة جمالية وحيوية إلى الأماكن العامة. بالإضافة إلى ذلك، يرى الشباب المبحوثون أنهم يساهمون في إعادة تشكيل الفضاءات العامة وجعلها أكثر حيوية وتفاعلية، وبالتالي يشجعون على المشاركة المجتمعية والتفاعل بين الأفراد. كما يعتبرون أن الفن في الشارع فرصة للتعبير عن هويتهم والتأكيد على وجودهم في المجتمع بطريقة إبداعية وملهمة.

6. التحليل والتأويل السوسيولوجي

قادنا تحليلنا لنتائج البحث للوصول لسبعة استنتاجات رئيسية تكشف عن الطبيعة المعقدة لهذه الظاهرة السوسيوثقافية خلال الفترة 2010-2023:

1.6. فنون الشارع كأداة للتعبير الشبابي والاعتراف

يشير الاستنتاج الأول إلى أن التعبيرات الفنية (مسرح الشارع والجرافيتي) تعد إحدى أدوات التعبير الشبابية ومكوناً من مكونات فنون الشارع التي تبناها الشباب، لإبداء رأيهم في الشأن العام وتشخيص الوضعيات للشباب عموماً وللتعبير عن حالتهم الذاتية. يبحث الشباب من خلال هذه الممارسات عن الاعتراف بهذه الفئة الشبابية بوصفهم أفراداً لهم احتياجاتهم، وبوصفها فئة فاعلة في المجتمع.

يمكن قراءة هذه الممارسات في ضوء نظريات الاعتراف الاجتماعي التي تؤكد على أهمية الاعتراف المتبادل في تشكيل الهوية الذاتية والجماعية (هونيث، 2012، ص. 100)، وفي سياق الصراع على الشرعية الثقافية والرمزية. الشباب لا يبحث فقط عن مساحات للتعبير، بل يسعى للاعتراف به كفاعل ثقافي واجتماعي له مساهمة حقيقية في بناء المجتمع.

2.6. كسر طوق التهميش واستعادة المدينة

ينطوي الاستنتاج الثاني على أن «محتوى» هذه الأشكال التعبيرية للشباب يمثل محاولة لكسر طوق التهميش والتجاهل إزاء الشباب من عوالم السياسة والمجتمع، والسعي الحثيث والخافت لامتلاك هوامش المدينة والفضاءات المنزوية وإنارتها

بفهمهم، والتي تفتقر إلى بنيات استقبال مرحبة بهم، ولبذل الجهد في سبيل أنسنتها، بإيجاد مساحات/فضاءات للتعبير عن إبداعاتهم واتجاهاتهم ورغبتهم في المشاركة الإيجابية في إدارة المدينة والمساهمة في دفعها الجمالي والحركي. إن هذا البعد يكشف عن صراع رمزي ومادي على الفضاء الحضري (Wacquant, 2023)، حيث يحاول الشباب استعادة "حقهم في المدينة" من خلال الممارسات الفنية. هذه الممارسات لا تقتصر على البعد الجمالي، بل تتضمن بعداً سياسياً يتعلق بإعادة تعريف من له الحق في استخدام الفضاءات العمومية وكيف ولماذا.

3.6. نشوء ثقافة شبابية مقاومة

يشي الاستنتاج الثالث بتشكيل جيني لثقافة شبابية تتصف بالمقاومة، وفي الآن ذاته بحدس ذكي في فهم المسارات السياسية والاجتماعية، والمطالبة باستحقاقات الفئة الشبابية. تكشف هذه التعبيرات عن ضرورة الإصغاء إلى مشكلاتهم وطرائق التعبير لديهم، والانتباه إلى إيقاعها المختلف عن إيقاع الكبار. هذه الثقافة الشبابية المقاومة لا تتخذ دائماً أشكالاً صريحة ومباشرة من المواجهة، بل تعتمد في كثير من الأحيان على أساليب رمزية وغير مباشرة للتعبير عن الرفض والاحتجاج. إنها مقاومة (Scott, 1989) يومية تتجلى في إعادة تعريف الفضاءات العمومية وفي الإصرار على الوجود والظهور رغم كل المعوقات.

4.6. المؤشرات على الاعتراف الرسمي

يأتي الاستنتاج الرابع ليؤكد أنه من الصعب أن نتحدث عن وجود ظاهرة تأسيسية إلا إذا احتضن الناس هذه الأشكال الفنية وأطروحاتها وأدجوها في ممارستهم اليومية وتقاليدهم الثقافية. لكن من الممكن التكلم عن مجموعة من المؤشرات التي تبين أن هذه الأشكال التعبيرية بدأت فعلاً في بسط تواجدتها على المستوى الرسمي خصوصاً خلال الفترة 2010-2023. من بين هذه المؤشرات ما قامت به وزارة الثقافة المغربية من تخصيص دعم سنوي لإنتاج عروض الشارع من مسرح شارع وسيرك شارع في عهد الوزير السابق محمد أمين صبيحي، وكذلك تأسيس الفيدرالية المغربية لفنون الشارع. بالإضافة إلى انتشار واسع للجغرافيتي الرسمي والذي تتزايد ممارسته سنة بعد سنة مع كل دورة من مهرجان كازا موجا بالدار البيضاء ومهرجان جدار بالرباط.

تشير هذه المؤشرات إلى تحول تدريجي في النظرة الرسمية تجاه فنون الشارع خلال الفترة المدروسة، من كونها ممارسات هامشية غير معترف بها، إلى أشكال تعبيرية تحظى بدعم مؤسساتي، وإن كان هذا الدعم ما يزال محدوداً ويخضع لشروط معينة.

5.6. الجدل حول الأصالة والمعاصرة

ينقسم رأي الشباب الممارسون لهذه الأشكال الفنية في الفضاء العمومي إلى رأيين. الرأي الأول يعتبر أنهم يمارسون فناً معاصراً ليست له علاقة بالأشكال التعبيرية التقليدية، ونذكر هنا من يمارس مسرح الشارع بشكل احترافي والجغرافيتي. أما الرأي الثاني فيقول إنهم ينطلقون من الموروث الثقافي من حلقة وأولاد حماد أموس، يبدعون أعمالهم في الفضاء العام، وتكلم عن الشكّلين سيرك الشارع ومسرح المنتدى (مسرح المقهورين).

هذا الجدول يعكس التوترات والتفاوضيات الجارية حول تعريف الهوية الثقافية المغربية المعاصرة (Bourqia, 1999)، وحول العلاقة بين التراث والحداثة. إنه يكشف عن محاولات متعددة لإيجاد توليفات جديدة تجمع بين الأصالة والمعاصرة، أو تقطع معها لصالح أشكال تعبيرية جديدة كلياً.

6.6. تنوع الخطاب والرسالة

يبين الاستنتاج السادس أن بعض هذه الأشكال التعبيرية تحمل خطاباً حقوقياً يدافع عن الحريات العامة وعن حقوق الأفراد وحقوق المرأة، ويساهم من خلال عرضه في خلق النقاش حول مجموعة من القضايا ذات الراهنية بالنسبة للمجتمع المغربي. ومنها من يعتبر أنه يقدم فناً ترفيهياً فقط ليست له رسالة بالضرورة. هذا التنوع في الخطابات والأهداف يعكس عدم التجانس داخل الفئة الشبابية الممارسة لفنون الشارع، ويكشف عن وجود مقاربات متعددة للفن ووظيفته الاجتماعية. بعض الممارسين يرون في الفن أداة للتغيير الاجتماعي والسياسي، بينما يركز آخرون على البعد الجمالي أو الترفيهي.

7.6. نمط جديد من التعبئة الاجتماعية والتأثير الرقمي

تعكس الأشكال التعبيرية المدروسة في الدار البيضاء خلال الفترة 2010-2023 نمطاً جديداً من التعبئة الاجتماعية. هذه الدينامية في نمط التعبير ترجع بطريقة ما إلى الشبكات الاجتماعية وعولمة التكنولوجيا الرقمية وحرية التعبير في المغرب، خاصة منذ الموجة الاحتجاجية سنة 2011 التي شكلت منعطفاً حاسماً في مسار هذه الظاهرة. تقدم الجرافيتي ومسرح الشارع وسيرك الشارع، نفسها في الفضاء الحضري كشكل من أشكال التعبير الجديدة والمناهضة للصور التقليدية للفرجة، على الرغم من أن مؤلفيها جزء من مجموعات غير متجانسة من حيث عواملهم الاجتماعية والسياسية والمحلية. يمكن تقسيم الفترة المدروسة إلى مرحلتين أساسيتين: المرحلة الأولى (2010-2011) تميزت بالبروز التدريجي لهذه الأشكال التعبيرية، والمرحلة الثانية (2011-2023) شهدت تسارعاً ملحوظاً في انتشارها وتنوعها، متأثرة بالسياق السياسي والاجتماعي لما بعد حركة 20 فبراير، وصولاً إلى مرحلة التأسيس المؤسسي النسبي في السنوات الأخيرة.

7. الخلاصة والآفاق البحثية

تكشف هذه الدراسة السوسيولوجية، التي امتدت على مدار الفترة من 2010 إلى 2023، عن أن التعبيرات الفنية الشبابية (Bourdieu, 1978) في الفضاء العمومي بمدينة الدار البيضاء ليست مجرد ممارسات فنية منفصلة عن السياق الاجتماعي والثقافي والسياسي، بل هي ظواهر سوسيوقافية معقدة تعبر عن رأي شبابي وتكرس الحق في التعبير وتبادل الآراء بحرية، وبلورة مواقف تجاه العديد من القضايا الاجتماعية والسياسية. أظهرت الدراسة أن هذه الظاهرة شهدت تطوراً ملحوظاً خلال الفترة المدروسة، من مبادرات فردية متفرقة في بداية العقد الثاني من الألفية الثالثة، إلى حركة ثقافية أكثر تنظيماً واعترافاً رسمياً في السنوات الأخيرة. كان لحركة 20 فبراير (2011) وما تلاها من تحولات سياسية واجتماعية دور محوري في تسريع هذه الدينامية وفتح مجالات أوسع للتعبير الحر.

تشكل فنون الشارع، بأشكالها المتنوعة، أداة للشباب المغربي لاستعادة حقهم في المدينة والمشاركة في تشكيل فضاءها العمومي. إنها محاولة لإعادة تعريف العلاقة بين الشباب والمجال الحضري، وبين الفن والسياسة، وبين الهامش والمركز. وقد أثبتت هذه الممارسات على مدار الثلاثة عشر عاماً المدروسة قدرتها على الصمود والتطور، رغم كل التحديات والصعوبات، بما فيها جائحة كورونا التي شكلت اختباراً حقيقياً لمرورها واستمراريتها.

إن اختيارنا في هذه الدراسة، سار في اتجاه التفكيك والتحليل العلمي لفنون الشارع، ليس باعتبارها فعلاً شبابياً منفصلاً على السياق السياسي والاجتماعي والثقافي، وإنما بوصفها ظاهرة سوسيوثقافية تعبر عن رأي شبابي، وتكرس الحق في التعبير وتبادل الآراء بحرية، وبلورة مواقف تجاه العديد من القضايا الاجتماعية والسياسية، داخل سياق محلي يتميز بدينامية مجتمعية.

الآفاق البحثية المستقبلية

تستدعي هذه الظاهرة مزيداً من البحث والدراسة لفهم تطوراتها المستقبلية بعد عام 2023 وتأثيراتها على البنية الاجتماعية والثقافية للمجتمع المغربي. من بين المحاور البحثية المستقبلية التي تستحق الاهتمام:

- دراسة مقارنة بين فنون الشارع في مختلف المدن المغربية لفهم التنوعات والخصوصيات المحلية
- تحليل تأثير السياسات العمومية على تطور هذه الأشكال التعبيرية وإمكانيات تطويرها
- تتبع مسارات الفنانين الشباب وتطور ممارساتهم الفنية عبر الزمن
- دراسة تلقي الجمهور لهذه الأشكال الفنية وتأثيرها على الوعي الجماعي
- تحليل دور التكنولوجيا الرقمية ووسائل التواصل الاجتماعي في انتشار وتطور فنون الشارع

كما تطرح الدراسة ضرورة اهتمام السياسات العمومية بهذه الفئة الشبابية وتوفير الإطار القانوني والمؤسسي المناسب لتطوير هذه الأشكال التعبيرية وتعزيز دورها في الدينامية الثقافية الحضرية. إن الاعتراف الرسمي بفنون الشارع كشكل ثقافي مشروع، وتوفير الدعم اللازم للممارسين، يمكن أن يساهم في إثراء المشهد الثقافي المغربي وتعزيز المشاركة الشبابية في الحياة العامة.

الهوامش

1. تنظّم جمعية البولفار EAC-L'Boulevard منذ عام 1999 أنشطة تتمحور حول اكتشاف ودعم المشهد البديل الشاب، وذلك من خلال تنظيم حفلات موسيقية ودورات تكوينية وورش عمل ولقاءات ومهرجانات (Le Tremplin، L'Boulevard، BoulevardDoc... إلخ). وفي عام 2010 أنشأت الجمعية مركز البولتيك Boultek، وهو أول مركز للموسيقى المعاصرة في المغرب؛ كما تُعدّ الجمعية ناشرةً لمطبوع فني تحت مسمى الكناش L'Kounache، وهي طبعة مقتنيات (Collector) مخصّصة للإبداع البديل بمختلف تخصصاته.

2. الأداء الفني العفوي: يقصد به الأداء الفني العفوي (Happening) شكلٌ من أشكال الفن الأدائي المعاصر الذي يقوم على الحدث الآني والتفاعل المباشر بين الفنان والجمهور في فضاء غير تقليدي. ظهر هذا الاتجاه في خمسينيات القرن

العشرين مع الفنان الأمريكي ألين كابرو (Allan Kaprow) الذي عرفه بأنه "حدث يحدث ببساطة، يُنقذ وفق تصور مسبق ولكن دون تكرار أو جمهور أو خشبة عرض، بحيث تظل الحدود بين الفن والحياة غير واضحة". يتميز الـ *Happening* بالعفوية، ودمج وسائط فنية مختلفة (المسرح، التشكيل، الموسيقى، الجسد، الفضاء)، كما يُعدّ تجربة فنية نقدية تسعى إلى تجاوز الفصل بين العمل الفني والواقع الاجتماعي.

3. مقهى الفلسفة: لمدينة الدار البيضاء بدأت سنة 2009 بمبادرة من طلاب وأساتذة فلسفة في حديقة الجامعة العربية.
4. فضاء المجازر القديمة بالدار البيضاء (Le Matadero / Les Abattoirs de Casablanca) هو مجمع معماري صناعي بُني سنة 1912 خلال فترة الحماية الفرنسية في حي الحي المحمدي، صممه المهندس الفرنسي جورج إرنست ديماريست. كان يضم مجازر للحيوانات الكبيرة والصغيرة، إسطبلات، فضاء لحرق الجيف، وغرف تبريد، على مساحة تقارب 5.5 هكتار منها 2.2 هكتار مغطاة بالبنائات. توقّف عن أداء وظيفته كمسلك سنة 2002 بعد نقل النشاط إلى مجازر جديدة في ضاحية مديونة، ثم أُدرج ضمن المعالم المحمية ذات القيمة التراثية لمدينة الدار البيضاء. منذ منتصف العقد الثاني من القرن الـ 21، تم تحويل الموقع تدريجياً إلى مصنع ثقافي وفني مفتوح أمام الفاعلين والمبدعين، يُستعمل لاحتضان المعارض، والعروض المسرحية، والورشات، والإقامات الفنية، ليصبح أحد أبرز رموز إعادة توظيف التراث الصناعي في خدمة الثقافة الحضرية المعاصرة بالمغرب.

بيان الإفصاح

لم يُبلغ المؤلف عن أي تضاربٍ محتملٍ في المصالح.

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Digital Marketing as a Strategic Lever for Strengthening the Competitiveness of Algeria's Tourism Sector


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Abstract

This study aims to analyze the new reality imposed by the digital transformation on the tourism sector in Algeria, by highlighting the aspects of the relationship between tourism and digital communication applications, as well as the digital marketing strategies enabled by modern technology. Additionally, it explores the indicators of the emergence of digital tourism in Algeria. The descriptive method was adopted to describe and analyze these transformations in order to understand their dimensions and actual impacts.

Despite the various initiatives undertaken by the Algerian state in terms of setting future plans and investing in the development of information and communication technology infrastructure, the results of the digital transformation process in the tourism sector remain below expectations. This indicates an ongoing need to enhance digital marketing applications and innovative practices to modernize the tourism sector and achieve the desired goals in this field.

Keywords: Digital Marketing, E-Tourism, Digital Transformation, Tourism Competitiveness, Algeria's Tourism Sector

التسويق الرقمي كرافعة لتعزيز تنافسية قطاع السياحة في الجزائر

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ملخص

تُعتبر السياحة الإلكترونية من أهم مكتسبات الثورة الرقمية لما لها من دور محوري في تطوير قطاع السياحة بالجزائر، وقد عملت الجزائر في السنوات الأخيرة على رقمنة القطاع وتعزيز استخدام التسويق الرقمي لجذب السياح وتطوير المؤسسات السياحية، ورغم الاستثمارات المتواصلة في تكنولوجيا المعلومات والاتصال، إلا أن التحول الرقمي في السياحة لم يحقق بعد النتائج المرجوة.

تكشف هذه الدراسة أن هناك ارتباطاً وثيقاً بين نجاح القطاع السياحي واعتماد استراتيجيات التسويق الرقمي الحديثة، لذلك لا تزال الجزائر تواجه تحديات تتعلق بالبنية التحتية والكفاءات التقنية تحد من تحقيق الأهداف، لذلك يبقى تطوير السياسات وتبني التسويق الرقمي ضرورة حتمية لدعم نمو قطاع السياحة في الجزائر.

الكلمات المفتاحية: التسويق الرقمي، السياحة الإلكترونية، التحول الرقمي، التنافسية السياحية، قطاع السياحة في الجزائر

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تسمح هذه الرخصة بالاستخدام غير التجاري، وينبغي نسبة العمل إلى صاحبه، مع بيان أي تعديلات عليه. كما تتيح حرية نسخ، وتوزيع، ونقل العمل بأي شكل من الأشكال، أو بأية وسيلة، ومزجه وتحويله وبناء عليه، طالما يُنسب العمل الأصلي إلى المؤلف.

مقدمة

تُعد السياحة من القطاعات الحيوية التي تساهم بفاعلية في تعزيز اقتصاد الجزائر، إذ تعكس هذه الصناعة ما يتميز به الوطن من تنوع ثقافي وبيئي فريد. فالجزائر تنفرد بمناظر طبيعية خلابة وتراثاً حضارياً غنياً، مما يمنحها مكانة متميزة كوجهة مفضلة لمختلف أنواع السياحة.

لذا أصبح ضروري على الهيئات المسؤولة استخدام تكنولوجيا المعلومات والاتصال لتنشيط الطلب السياحي على هذه المناطق؛ إلا أن التسويق التقليدي غالباً ما يكون غير كاف للوصول إليه بالطريقة المثلى. هنا يأتي دور التسويق الرقمي ليلعب دوراً حيوياً في تعزيز السياحة في الجزائر، من خلال استخدام التقنيات الرقمية التي من شأنها تعزيز جاذبية المناطق السياحية، وتسليط الضوء على الثقافة المحلية والتجارب الفريدة، يتيح التسويق الرقمي أيضاً تجارب افتراضية واقعية للمستهلكين، مما يعزز إشراكهم ويشجعهم على اكتشاف المزيد عن جمال الطبيعة والأماكن السياحية في الجزائر.

إشكالية الدراسة: إن المتبع لواقع السياحة في الجزائر يجد أن معظم مؤسسات القطاع السياحي تعاني الكثير من المعوقات، مما يؤثر سلباً على قدرة القطاع في تبني نظام تسويقي رقمي ملائم يتماشى مع التطورات الحاصلة لمواكبة الركب العالمي، وبما يضمن جودة عالية في تطوير الخدمات السياحية وتحقيق الأهداف المنشودة، ومن خلال ما سبق يمكن طرح الإشكالية التالية: كيف يساهم التسويق الرقمي في تحقيق وتنمية تنافسية السياحة الجزائرية وتحسين جاذبيتها محلياً ودولياً؟

الأسئلة الفرعية: إن البحث في هذه الإشكالية يقودنا لطرح مجموعة من الأسئلة وهي:

- ما المقصود بالتسويق الرقمي، وما هي أهم أبعاده وأدواته؟
- ما مدى تأثير التسويق الرقمي في رفع قدرة الجزائر التنافسية في قطاع السياحة مقارنة بالدول الأخرى؟
- ما هي أبرز معوقات تطبيق التسويق الرقمي بفعالية في القطاع السياحي بالجزائر؟

أهداف الدراسة: تتمثل أهداف هذه الدراسة في:

- تقديم محتوى نظري حول التسويق الرقمي وتطوير الخدمات السياحية؛
- إبراز دور وفعالية التسويق الرقمي في دعم ونمو قطاع السياحة في الجزائر؛
- التعرف على أهمية القطاع السياحي في الجزائر وأسس نجاحه.

أهمية الدراسة: تستمد هذه الدراسة أهميتها من أهمية الموضوع المبحوث فيه، فهو موضوع حيوي وهام يتمثل في أثر التسويق الرقمي على تطوير القطاع السياحي، كما يكتسي التسويق الرقمي أهمية بالغة تتمثل في أنه أحد أساليب التسويق الحديث التي تعتمد بشكل كبير على شبكة الانترنت في تسويق الخدمات السياحية، ومن جهة أخرى يعتبر تقديم الخدمات السياحية في الوقت الراهن بشكل غير مؤلوف أو غير متوقع من قبل العميل مبادرة جيدة وابتكار من شأنه مواجهة المنافسة والريادة في السوق المحلي والدولي.

منهج الدراسة: اعتمدنا في هذا البحث على أسلوب تحليلي يعتمد على السرد والوصف من خلال جمع البيانات والمعلومات من مختلف المصادر مثل: الكتب، المقالات والمكتبيات...إلخ.

هيكل الدراسة: تم تقسيم هذه الدراسة الى محورين الأول تم التطرق فيه إلى ماهية التسويق الرقمي وعلاقته بقطاع السياحة، أما المحور الثاني فخصص لواقع التسويق الرقمي المدعم للسياحة في الجزائر.

1. ماهية التسويق الرقمي وعلاقته بقطاع السياحة

التسويق الرقمي لا يقتصر فقط على إنجاز عمليات البيع للأعمال التجارية، بل يشمل أيضاً جميع الوظائف الإلكترونية التي تدعم المؤسسة في تنفيذ أنشطتها التجارية بكفاءة، من خلال استخدام التكنولوجيا الرقمية لتسهيل وتعزيز عمليات التسويق والإدارة والتواصل مع العملاء.

1.1. تعريف التسويق الرقمي

هناك العديد من التعريفات لمصطلح التسويق الرقمي، فهناك من يعرفه على أنه: "مختلف العمليات التي تكون قبل وأثناء وبعد العملية الإنتاجية للسلع أو الخدمات والتي تكون قبل وأثناء وبعد العملية الإنتاجية للسلع أو الخدمات والتي تتم عبر مختلف التقنيات الرقمية. (الطائي و الصميدعي، 2005، صفحة 351)

أما الكاتب زكريا أحمد عزام عرفه على أنه: "إدارة التفاعل بين الشركة والمستهلك ضمن البيئة الافتراضية من أجل تحقيق التبادل المشترك من منافع مشتركة". (زكريا أحمد و عبد الباسط، 2010، صفحة 440)

كما يعرف أيضاً على أنه: "مجموعة من الأساليب والوسائل التقنية المستعملة لتسويق السلع والخدمات إلى المستهلكين وبواسطة وسيلة إعلامية أو شبكة رقمية ويمتلك مميزات خصوصية مقارنة بالتسويق العادي وهذه المزايا تظهر من خلال استراتيجية تسويق جديدة في المؤسسة تسمح باستغلال الفرص التي تنتجها تغيرات المحيط الداخلي والخارجي في اقتصادية المؤسسة بفضل التكنولوجيا الحديثة للإعلام والاتصال. (أبو قاسم، 2008، صفحة 99)

وقد عرفه Forest Strous كذلك على أنه: "استخدام الانترنت والحاسبات الآلية في أداء الأنشطة التسويقية وعليه فإن كل أنشطة التسويق الرقمي تعد من أنشطة الأعمال الإلكترونية." (ادريس ثابت و جمال الدين، 2005، صفحة 435).

ومن بين هذه التعاريف يمكن استنتاج تعريف شامل للتسويق الرقمي وهو مجموع الجهود والأنشطة التسويقية المبذولة من طرف المنظمة لإيصال المعلومات الإلكترونية الخاص بالمنظمة لأكبر عدد من العملاء.

ولا بد من الإشارة إلى أن الكثير يستخدم مصطلح التسويق الرقمي كمرادف للتسويق الإلكتروني وذلك نظراً للتشابه الكبير بين الوسائل المعتمدة في كليهما وكذا الهدف المحقق منهما، غير أن مراجعة الأدبيات المتعلقة بالتسويق الإلكتروني تبين أنه بالإضافة إلى الوسائل الرقمية في عملية التسويق فهو يحتوي أيضاً على البرمجيات الخاصة بإدارة البيانات، تقنيات وبرمجيات الدفع الإلكتروني والحماية الإلكترونية.

فالتسويق الإلكتروني غالباً ما يقصد به الأداة أو الدعامة (Le support) أما الرقمي فيعبر عن المحتوى، لذا يمكن القول أن التسويق الرقمي عبارة عن واجهة للتسويق الإلكتروني أو الجزء الذي يدركه الزبون من التسويق الإلكتروني ونافذة الاتصال والتفاعل معه.

2.1. الفرق بين التسويق الرقمي والتسويق التقليدي

إن التسويق الرقمي لم يأت كبديل أو لإلغاء التسويق التقليدي بل كمكمل له نظرا للمزايا التي يوفرها وكذا ليعطي التسويق صبغة جديدة في ظل التطور التكنولوجي، وتبيان الفرق بين التسويق التقليدي والرقمي، قمنا بتلخيصها في الجدول أدناه.

جدول رقم (01) : الفروقات الجوهرية بين التسويق الرقمي والتقليدي

التسويق الرقمي	التسويق التقليدي
الفكر التسويقي	اتصال في اتجاه واحد أو بطريقة واحدة
العلامة التجارية	العلامة تعتبر شيء مقدس
الاتصال	خلق ودفع الرسالة إلى الزبائن بهدف استيعابها
المحتوى	محتوى محترف مراقب من طرف المسوقين
الاستراتيجية	من أعلى إلى أسفل الاستراتيجية مفروضة من قبل الإدارة العليا.
المعلومة	المعلومة منظمة حسب قنوات ملفات ومجموعات تناسب المعلنين.
تعزيز الحوار، العلاقات تكون أكثر شفافية، كسب الثقة وبناء المصداقية.	قيمة العلامة تحدد من طرف الزبائن، ماهي احتمالات أن يوصي الزبائن بهذه العلامة؟
بيئة رقمية، اتصالات تفاعلية عبر الاستعلام والبحث، تعليقات الزبائن الشخصية أو الحوار.	مزيج بين المحتوى المحترف والمحتوى المصمم حسب الزبون ويكون مرئي.
استراتيجية مبنية على الأفكار الجديدة المحصل عليها من خلال الاختبارات وتدخل الزبائن.	المعلومة متوفرة حسب الطلب من خلال استخدام كلمة مفتاحية تلائم المستخدمين.

المصدر: (قادم و طالة، 2022، صفحة 39).

3.1. ماهية السياحة الالكترونية

تطبق الرقمنة على مختلف النشاطات التجارية، والخدمات واحدة من أهم هذه النشاطات وأكثرها تناسبا مع الرقمنة، إضافة إلى أكثرها انتشارا في الوقت الحالي، فمahi السياحة الالكترونية ومahi أهميتها كأسلوب سياحي للسائح والمؤسسات السياحية.

1.3.1. تعريف السياحة الالكترونية

عرفتها المنظمة العالمية بأنها: "أنشطة انتاج السلع والخدمات وتوزيعها وتسويقها أو تسليمها للمشتري من خلال الوسائط الالكترونية. (علوان و محمد زكي، 2016، صفحة 179)

كما تم تعريفها بأنها: "نمط سياحي يتم تنفيذ معاملاته التي تتم بين مؤسسة سياحية وأخرى أو بين مؤسسة سياحية ومستهلك، وذلك من خلال استخدام تكنولوجيا المعلومات والاتصالات، أوهي نمط سياحي تتلاقى فيها عروض الخدمات السياحية عن طريق شبكة المعلومات الدولية (الانترنت) مع رغبات جميع السائحين الراغبين في قبول هذه الخدمات السياحية المقدمة عبر الانترنت ومختلف الوسائل التكنولوجية والرقمية المتاحة". (رشا، 2010، صفحة 23)

ونشير إلى أن المشرع الجزائري لم يقدم تعريف واضح للسياحة الالكترونية بل اكتفى بدمجه مع النشاطات التجارية التي تتم عبر شبكة الانترنت، واعتبرتها نشاط ترويجي يستخدم وسائل إعلانية مختلفة، أما بالنسبة لتعريف السياحة فقد تبني تعريف الذي وضعته المنظمة العالمية للسياحة مع إضافة بعض المصطلحات مثل: الدخول، زائر، مسافر، متنزه.

من التعاريف السابقة يمكن أن نوضح عناصر السياحة الالكترونية في: (رشا، 2010، صفحة 24)

- الشركة أو المؤسسة السياحية المقدمة للخدمة السياحية؛
- المستهدف من عملية التسويق السياحي والخدمة السياحية؛
- الرابط بين السائح والمؤسسة السياحية والمتمثل في شبكة المعلومات العالمية (الانترنت).

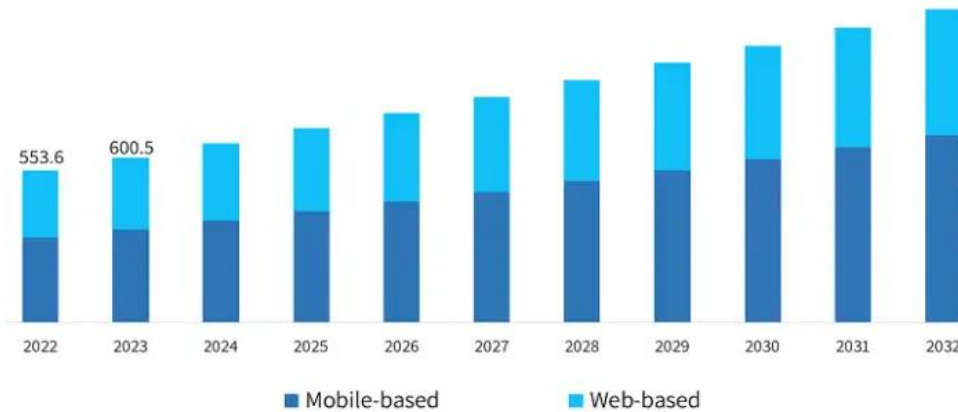
2.3.1. بيانات إحصائية متنوعة عن السياحة وأهميتها عالميا

للسياحة أهمية على مستوى المستوى العالمي، ويمكن أن نحصرها في الاحصائيات التالية: (نهار و لحول، 2019، صفحة

(107)

- 40% من حجوزات الفنادق ومعرضات السياحة عالميا تتم عبر الانترنت (بيانات Rezdy)؛
- 59% من السائحين الاسيويين يقومون بحجز رحلاتهم السياحية عبر الانترنت (Tnooz)؛
- 60% من السياح المسافرين للترفيه و 41% من المسافرين من رجال الاعمال يقومون بترتيبات السفر الخاصة بهم، بشكل عام عبر الانترنت (أماديوس)؛
- أكثر من 148.3 مليون شخص حول العالم يستخدمون الانترنت لترتيب حجوزاتهم السياحية والفندقية عبر الانترنت؛
- إيرادات الحجوزات عبر الانترنت نمت بمقدار 73% عن الخمس سنوات الماضية؛
- 97% من رجال وأصحاب الاعمال والمواطنين يستخدمون الانترنت للبحث عن أعمال تجارية؛
- 20% من البحث على شبكة جوجل العالمية للأعمال والبحث المحلي؛
- ما يقرب من 90% من منظمي الرحلات السياحية لا تزال تتلقى الحجوزات يدويا عن طريق الحجز بالبريد الالكتروني؛
- 65% من السياح تبدأ البحث على الانترنت قبل أن تقرر أين وكيفية السفر والحجز؛
- المسافر المحترف يزور حوالي 22 موقع على الانترنت قبل أن يختار الموقع الذي يشتري منه؛
- 44% من المسافرين يستخدمون هواتفهم الذكية للبحث والحجز أثناء سفرهم؛
- 70% من المسافرين يقومون بتحديث صفحاتهم على مواقع التواصل الاجتماعي أثناء تواجدهم في عطلة؛

شكل رقم (01) : حجم سوق السفر عبر الإنترنت



المصدر: (GMIPulse, 2024, p. 409)

من خلال الشكل يمكن أن نشير إلى أنه في مايو 2024، أبرز تقرير صادر عن مجلس السياحة العالمي المعني بالسفر زيادة بنسبة 20 في المائة في نفقات السفر العالمية. ويُعزى ذلك إلى الانتعاش الاقتصادي وزيادة الإنفاق الاستهلاكي على السفر إلى 600.5 بليون دولار وبنسبة نمو 7 %، كما يتوقع تحقيق ما يقارب 1,1 تريليون دولار سنة 2032، وبالإضافة إلى ذلك، فإن العروض الترويجية، والخصومات، واستراتيجيات التسعير التنافسي التي تستخدمها وكالات السفر عبر الإنترنت تزيد من حفز اهتمام العملاء.

4.1. أدوات التسويق الرقمي في قطاع السياحة: للتسويق الرقمي في القطاع السياحي عدة أدوات من أهمها:

- الموقع الإلكتروني: بإمكان المؤسسات السياحية تسويق منتجاتها عن طريق التسويق الرقمي، من خلال إنشاء موقع خاص على الإنترنت، إذ يجب أن يكون مصمم بدقة وباحترافية عالية، كما يجب أن يتم الترويج لهذا الموقع من طرف القائمين عليه ليكون أكثر فعالية ويؤدي وظائفه.
- المواقع المتخصصة: بالإضافة إلى المواقع الإلكترونية الخاصة بالمؤسسات السياحية، هناك مواقع متخصصة تقوم بالترويج والدعاية للمنتجات السياحية لشركات أخرى عن طريق إعلانات مرئية وفيديوهات، إذ تنزل في المواقع الأكثر تصفحاً ومن طرف الزبائن والأكثر شهرة.
- التسويق عبر منصات التواصل الاجتماعي: يقدر عدد الأشخاص الذين يستخدمون منصات التواصل الاجتماعي 4,76 مليار شخص، وقد أصبحت تساعد في دراسة الجمهور وتحليل أذواقهم، فكلما كان الإعلان الموجودة في هذه المنصات ذو جودة عالية، كان له الأثر الإيجابي في جعل مستخدمي المنصات في الترويج للإعلانات بإرسالها للمشاركة مع الأهل والأصدقاء، ومن أهم منصات التواصل الاجتماعي نجد:
 - الفيسبوك: حوالي 2,9 مليار مستخدم؛
 - تويتر: حوالي 229 مليون مستخدم؛
 - لينكدان: حوالي 900 مليون مستخدم؛
 - سناب شات: حوالي 229 مليون مستخدم؛

- انستغرام: حوالي 500 مليون مستخدم. (بوفارة، 2013، الصفحات 266-267)

- محركات البحث: يعد Google من أشهر محركات البحث، ويستحوذ على 90% من عمليات البحوث اليومية من طرف الأفراد، فمجرد أن يقوم الزائر بالبحث عبر هذا المحرك تظهر له مواقع الشركات في نتائج بحثه الأولى، وبالتالي يساهم في زيادة زائري الموقع الخاصة بالتسويق الرقمي السياحي؛
- التسويق عبر البريد الإلكتروني: هذا النوع يعد من أهم وسائل التسويق السياحي الرقمي، حيث يتميز بالسرعة مع إمكانية إرسال الرسالة الواحدة وبدون أي تكلفة. (بوطورة و بليردوح، صفحة 66)
- التسويق بالمحتوى: يقال أن المحتوى هو الملك، وهذا لأهميته في إيصال الرسائل التسويقية الناجحة، كما أنه قد يختلف التسويق بالمحتوى عن المعلومات التي تقدمها الشركات، حيث تقدم الشركة الكثير من المعلومات عن مميزات منتجاتها أو خدماتها وعن كونه الأفضل، فلن تضيف تلك المعلومات قيمة فعلية للزبون، عكس التسويق بالمحتوى الذي يعتمد بالأساس على إضافة قيمة ومعلومة حقيقية إلى العميل، وهناك عدة أدوات مساعدة لصناعة المحتوى العالي الجودة منها:

- Google keyword planner, Google analytics

- Ahrefs,sumo,feedly (بوطورة و بليردوح، صفحة 66)

5.1. دور التسويق الرقمي في تنشيط قطاع السياحة: يلعب التسويق الرقمي دورا هاما في تنشيط السياحة بالنظر إلى التسويق التقليدي الذي يتطلب من الزبون الحضور إلى مكان بيع وتوزيع الخدمات، الأمر الذي يزيد من تكلفة الخدمة وما يمكن أن يتكبده الزبون من مشقة في التنقل، وكما سبق الإشارة فإن التسويق الرقمي له دور في تنشيط قطاع السياحة من خلال: (ردينة و الصميدعي، 2004، الصفحات 283-285)

- السهولة والبساطة في تقديم المعلومات: إذ أنه أصبح باستطاعته أن يحصل الزبون على كل البيانات والمعطيات التي يريدها المنتج السياحي، فعن طريق الانترنت بإمكانه الاطلاع على خدمات مختلفة مثل: أسعار الفنادق والخدمات المقدمة، أماكن تواجد المنتجات السياحية...إلخ؛
- زيادة القدرة التنافسية للمؤسسة السياحية بما يساعد في الرفع من المبيعات والمداخيل؛
- إمكانية تحسين المنتج السياحي وظهور منتجات ونشاطات سياحية جديدة تتلاءم مع ما يريده السائح وهذا بواسطة تشخيص الآراء التي يبديها السائح؛
- السرعة في التعريف بالخدمات المقدمة وزيادة الوعي السياحي: وهذا بأقل جهد ممكن، وبالتالي القدرة الكبيرة للتسويق الرقمي على استقطاب شريحة كبيرة من السواح.

6.1. الفرص التي يحققها التسويق الرقمي لقطاع السياحة: يمكن للتسويق الرقمي أن يحقق مجموعة من الفرص للقطاع السياحي، ومن بينها: (بورنان الشريف، 2024، صفحة 23)

- إمكانية الوصول إلى الأسواق العالمية: حيث أكدت الدراسات أن التسويق الرقمي يؤدي إلى توسيع الأسواق وزيادة الحصة للشركات بنسب تتراوح بين 3-22% بسبب الانتشار العالمي؛
- تقديم السلع والخدمات وفقا لحاجات العملاء: من خلال التسويق الرقمي يجد المسوقون فرصة أكبر لتكييف منتجاتهم طبقا لحاجات العملاء إلكترونيا؛
- الحصول على معلومات مرتدة لتطوير المنتج: قدم التسويق الرقمي فرصة جوهرية للاستجابة للتغيرات التي تحدث في الأسواق والتقنيات بشكل يحقق دمج حاجات العملاء مع التطورات التكنولوجية؛
- تخفيض التكاليف واستعمال التسعير المرن: حيث يوفر تقنيات تمكن المشتري من البحث والعثور على أفضل الأسعار المتوفرة؛
- استحداث أشكال وقنوات جديدة للتوزيع: قدم التسويق الرقمي منظورا جديدا لسوق الكترونية يكون التفاعل فيها بين طرفي عملية التبادل دون الحاجة إلى وسطاء، كما قدم التسويق الرقمي نوعا مبتكرا من الوسطاء والذين يطلق عليهم وسطاء المعرفة الالكترونية وتعمل على تسهيل عملية التبادل؛
- استخدام أساليب ترويجية تفاعلية مع العملاء: يعتبر الإعلان الرقمي عبر الانترنت من أكثر وسائل الترويج جاذبية وانتشار في ظل الاتجاه نحو التسويق الرقمي؛
- دعم وتفعيل إدارة العلاقات مع العملاء: يستند التسويق الرقمي إلى مفاهيم جديدة وقناعات ترقى إلى اعتبار العميل شريكا استراتيجيا في منشآت الأعمال؛
- تحقيق ميزة تنافسية وموقع استراتيجي في السوق: تمر المنافسة في الأسواق الالكترونية بمرحلة انتقالية نتيجة إلى التحول إلى المنافسة المستندة للقدرات، ولا شك أن التطورات الهائلة في تكنولوجيا المعلومات المرتبطة بالتسويق الرقمي قد خلقت فرصا غير مسبوقة في دعم الاستراتيجيات المميزة وتحسين الوضع التنافسي للشركات.

2. التجربة الجزائرية في تطبيق التسويق الرقمي في قطاع السياحة

دخلت الجزائر في السنوات الأخيرة في مرحلة متسارعة من خلال مواكبة التطور الهائل في مجال التكنولوجيا على المستوى العالمي وانعكاسه على الجزائر. خاصة مع تطور نظام الجيل الثالث والرابع على الأجهزة الذكية وتغطيته تدريجيا للتراب الوطني، والبدئ في التفكير للولوج إلى نظام الجيل الخامس، حيث أن هذه التطبيقات تدخل على السياحة لتعطيها اتصالا أكثر وترويجا للمنتجات والخدمات المقدمة، حيث أن أغلب الفنادق والوكالات السياحية في الجزائر لها مواقع الكترونية يمكن الحجز عبرها.

1.2. المقومات السياحية في الجزائر

- يمكن حصر ستة مناطق سياحية في الجزائر تبعا لتنوع المعطيات الجغرافية كالتالي: (كواش، 2004، الصفحات 222-223)
- منطقة الساحل والسهول الشمالية وهضاب الأطلس الشمالي: تتميز هذه المنطقة بطول شواطئها 1200 كلم، وبعدها كبير من المواقع الأثرية والتي تعود إلى عهد الرومان، العرب والمسلمين وأثار تعود إلى العصور القديمة؛

- منطقة السلسلة الأطلسية: والتي توجد بها أكبر قمة جبلية في الشمال وهي "لاله خديجة" بـ 2208 م، كما نجد فيها جبال الأوراس الونشريس، سلسلة جبلية موازية للسواحل تتميز بإمكانيات كبيرة لتنمية أنواع سياحية عديدة كالنشاطات الرياضية الشتوية كالتزحلق على الجليد، التسلق، الصيد ...
 - منطقة الهضاب العليا: والتي تتميز بمناخها القاري وبمواقعها الأثرية وصناعاتها الحرفية والتقليدية المتنوعة؛
 - منطقة الأطلس الصحراوي: وهي المناطق الواقعة ما بين الهضاب العليا والصحراء الكبرى والتي يمكن تنمية فيها السياحة المناخية المعدنية، الصيد ...
 - منطقة الواحات شمال الصحراء: والتي تتميز باعتدال درجة الحرارة، فهي أقل ارتفاع من درجة الحرارة بالصحراء الكبرى وبها تتمركز الواحات بنخيلها وبحيراتهما كما تتوفر على الصناعات التقليدية للمنطقة؛
 - منطقة الصحراء الكبرى: وهي المنطقة المعروفة بالجنوب الكبير (الهقار، الطاسيلي) وتتميز بالمساحات الشاسعة والجبال الشامخة وبالحرارة المعتدلة طوال فصول السنة. إن هذا التنوع يساعد على تنمية أنواع عديدة من السياحة وهو ما يساعد على عدم تركيز النشاط السياحية خلال فترة زمنية محددة ويساعد على استمرارية النشاط السياحي خلال فصول السنة.
- والجزائر في مخططها التوجيهي للسياحة اعتمدت على مجموعة من الوجهات لاستقطاب سياحها ويمكن تلخيصها في الشكل أدناه.

شكل رقم (02): الأسواق السياحية الدولية الرئيسية للوجهة السياحية (الجزائر).



المصدر: (GMIPulse, 2024, p. 409)

2.2. مراحل تطبيق التسويق الرقمي في قطاع السياحة

وضعت الجزائر مخططا لتسويق الوجهة السياحية "الجزائر" ضمن البرنامج التوجيهي للهيئة السياحية (SDAT 2030)، وقد اعتمد هذا المخطط بالأساس على تكنولوجيات الاعلام والاتصال، بحيث تم عقد اتفاق بين وزارة السياحة والصناعات

التقليدية ووزارة البريد والمواصلات لإنجاح هذا المشروع والمتمثل في انشاء موقع سياحي متمثل في البوابة الالكترونية للسياحة في الجزائر والذي يتم عن طريقه التسويق للوجهة الجزائرية للأسواق الأجنبية من جهة وللأسواق المحلي من جهة أخرى. عرفت الجزائر ثلاث مراحل أساسية من أجل تفعيل التسويق الرقمي للخدمات السياحية، حيث تمثل الهدف من المرحلة الأولى في عرض المعلومات رقميا على السائح كنمط تسويق جديد، وتمت خلالها عمليات الربط والتنسيق بين مختلف المؤسسات الوطنية في المجال السياحي، أما المرحلة الثانية فقد تمثل الهدف منها في تمكين السائح من شراء العروض السياحية المتوفرة ودفع قيمتها إلكترونيا، وذلك من خلال إيجاد البنية التي تمكن الإدارات التابعة للمؤسسات السياحية من إنهاء الصفقات وتسوية المبالغ، أما المرحلة الأخيرة فتم خلالها ربط السياحة الالكترونية مع بقية المؤسسات التجارية في مختلف الدول وذلك بعد تطبيق التسويق الرقمي المتكامل، حيث يستطيع بعد ذلك القطاع السياحي الاستفادة من الخدمات الالكترونية المتوفرة وكذا إتمام المعاملات المالية إلكترونيا. (هادية و بوبكر، 2017، صفحة 5)

3.2. أدوات التسويق الرقمي المستخدمة في قطاع السياحة في الجزائر

عملت الجزائر على تبني أدوات التسويق الرقمي من أجل الدفع بقطاعها السياحي نحو النمو ومن بين هذه الأدوات نذكر: (السعيد و صورية، 2018، الصفحات 245-246)

- منح مركز جديد للمعلومات الالكترونية لفائدة الوكالة الوطنية للصناعات التقليدية: بتاريخ 2009/09/28 تم افتتاح مركز الاعلام والتوثيق الالكتروني والمتعلق بالصناعة والحرف التقليدية وذلك بمقر الوكالة الوطنية للصناعات التقليدية بسيدي فرج بالعاصمة وهو يتكون من قاعدة بيانات ومساحة مخصصة للفكر والمعرفة وذلك تحت تصرف الحرفيين، الباحثين، الطلبة، الفاعلين السياحيين والاقتصاديين وكل المعنيين بالصناعة التقليدية وذلك لاحتوائه على تنوع المحتويات حول القطاع، من خلال 2086 وحدة مابين كتب ووثائق الكترونية من خلال أجهزة إعلام آلي موصولة بالانترنت، حيث يسمح هذا المركز بتطوير الصناعة والحرف التقليدية قصد تنمية السياحة واستدامتها، من خلال تبادل الخبرات بين الباحثين والفاعلين في الصناعات والحرف التقليدية.
- تطوير الوجهات السياحية عن طريق السياحة الالكترونية: إن دخول نظامي الجيل الثالث والرابع والعمل على ادخال الجيل الخامس في الأجهزة بأنواعها وخاصة الذكية منها ساهم في تطور السياحة والاستثمار في وسائل وأدوات تكنولوجيا المعلومات والاتصال، بهدف إعطاء المعلومة للزبون في الوقت الحقيقي، وإعطاء أحسن تعيين وتوجيه نحو الوجهات السياحية من خلال التسويق، الحجز، التنظيم والنقل، ويبقى الاشكال هو عدم وجود نصوص تنظيمية عن التسويق الرقمي وتبادلته بين الفاعلين في النشاط السياحي؛
- المواقع الالكترونية لتنمية السياحة في الجزائر: إن المواقع الالكترونية بأنواعها تعتبر كعامل أساسي لإعطاء الصورة الحقيقية للسياحة الجزائرية وتدعيم وجهة الجزائر، فعلى الفاعلين في السياحة من خلال مواقعهم أن يتحملوا المسؤولية في تحسين صورة وجهة الجزائر السياحية بكل الوسائل المتاحة، وخاصة الترويج للمنتجات السياحية لتنمية الجذب السياحي، كما عليهم أن يتيقنوا أنهم أول المستفيدين من هذا النشاط؛

- خدمات اتصالات الجزائر لتفعيل قطاع السياحة: اعتمدت اتصالات الجزائر مؤخرا وفي ظل المنافسة الكبيرة وخاصة في السوق العالمية، وكذا التوسع في السوق المحلي ومواكبة الإصلاحات الاقتصادية التي باشرتها الجزائر لتنويع اقتصادها لتشمل عدة قطاعات، وخاصة قطاع السياحة على برنامج ثري ومتكامل لتقديم أفضل الخدمات لعصرنة وتعميم عملية الرقمنة في هذه القطاعات وبالأخص قطاع السياحة، ومن بين هاته القطاعات نجد:
 - المؤتمرات عن بعد: تضع في هذا الإطار اتصالات الجزائر تحت تصرف المؤسسات الفندقية السياحية قاعات وحقائب مجهزة بالفيديو موزعة عبر التراب الوطني للقيام باجتماعات وتجمعات وتكوينات عن بعد عن طريق الفيديو وذلك عن طريق الفيديو وذلك ما بين مواقع وطنية ودولية؛
 - خدمة مركز الاتصالات المتعددة القنوات: يمثل رضا السائح مؤشرا قويا لنجاح الخدمات المقدمة في قطاع السياحة، وفي هذا الإطار اشتركت اتصالات الجزائر مع الرائد العالمي في الحلول الخاصة بمراكز الاتصال والموزعات الصوتية ووظيفية هي التسيير عن بعد للزبائن (السائح)، وسهل تقدم التكنولوجيا والانترنت أيضا تطور مختلف قنوات الاتصال مما نشأ عنه ما يسمى اليوم "مركز الاتصالات المتعددة الوسائط" أو "مركز الاتصالات المتعددة القنوات" ومن بين هذه الأنواع نجد: مراكز الاتصال ذات المنحى الإعلامي، مراكز الاتصال المتخصصة لتلقي الشكاوي، مراكز الاتصال ذات المنحى التجاري؛
 - خدمة إيواء المواقع الالكترونية: تمنح اتصالات الجزائر للمهنيين إمكانية إيواء اسم مجال مؤسساتهم وتقوم بكافة المساعي الضرورية لتسجيل وإدارة اسم المجال وفي هذا الإطار تقترح اتصالات الجزائر خدمة إيواء المواقع الالكترونية المهنية على موزعات عالية الأداء؛
 - تطبيقات الهواتف النقالة المبتكرة في الجزائر: بالرغم من عدم وجود تطبيقات كثيرة فإن هناك محاولات محتشمة، تتمثل أهمها في:
 - تطبيق (ALGERIA): وهو أول تطبيق في الجزائر يستخدم نظام تشغيل ابتكرته شرطة أبل آيفون سنة 2007 للهواتف النقالة واللوحات الرقمية، حيث يحتوي على أغلب المعلومات حول الجزائر ضمن المحاور الرئيسية التالية: معلومات حول السياحة الجزائرية، مواقع الجذب السياحي في الجزائر، المواقع المعتمدة على الخرائط، الترجمة الفورية للعربية مع اللغات العالمية للسائح الأجانب والجزائريين؛
 - تطبيق (ALGERIA GUIDE): وهو يتضمن تطبيقات خاصة للسائح الأجانب القادمين للجزائر يمكن تحميلها بمجرد الوصول للجزائر وتتضمن التالي: تطبيقات نفعية، تطبيقات الاكتشاف، تطبيقات النشاطات.

4.2. معوقات التسويق الرقمي في قطاع السياحة

إن قيام السياحة الالكترونية مربوط بقيام التجارة الالكترونية وبالتالي فإن تطوير وتنمية السياحة مربوط بتطوير التسويق والتجارة عبر الانترنت، وفي حالة الجزائر نجد التجارة الالكترونية ضعيفة مقارنة بالدول الأخرى والمجاورة، وبالتالي

ضعف السياحة الالكترونية كونها جزء من التجارة الالكترونية، ومن بين النقائص نذكر: (شني و الشارف، 2021، الصفحات 14-16)

- غياب البيع عبر الخط يكبح السياحة الالكترونية في الجزائر: إن بيع المنتجات والخدمات السياحية هي تجارة لا تزال بطيئة في الجزائر، حيث أن قلة المواقع السياحية المتخصصة في هذا المجال ينعكس على ذلك وحتى إن وجدت مواقع لدى بعض الوكالات السياحية أو الفاعلين في النشاط السياحي (مثل المؤثر خبيب) فإنها لا تهتم كثيرا بتسويق وروج منتجاتها فهي فقط تعرض مواعيد لرحلات ووجهات وخدمات أخرى، والسبب في ذلك يعود إلى بطء عملية التجارة الالكترونية والتعامل الرقمي في الجزائر، كما أن غياب المنافسة بين الفاعلين في السياحة لا يؤدي إلى البحث عن التميز واكتشاف أساليب جديدة وابتكار طرق للتواصل مع العملاء؛
- تمثيل محدود للوكالات السياحية على الخط: لا تزال الوكالات السياحية بعيدة عن المنافسة الحديثة من منظور المنظمة العالمية للسياحة سواء عالميا أو إقليميا، حيث أنها من خلال المواقع القليلة الموجودة لبعض الوكالات والتي تعرض من خلالها خدماتها ووجهاتها المقترحة فقط، وقد يتجاوز البعض ذلك في طرح عملية الحجز للرحلات والفنادق الموجودة في المنطقة، في حين تغيب التطبيقات الحديثة في مواقعها، وقد قامت وزارة السياحة بمبادرة في نهاية سنة 2010 باقتراح على الوكالات السياحية القيام بشراكات عالمية مع هيئات ومؤسسات متطورة في هذا المجال، إلا أن هذه الوكالات لم تتجاوب خوفا من بعض التكاليف لتحسين واقعا؛
- عدم مواكبة الفاعلين في السياحة للتطورات الحاصلة في تكنولوجيا المعلومات والاتصالات؛
- غياب المقاربة ما بين قطاعي السياحة والبنوك: تعاني السياحة الالكترونية في الجزائر كثيرا من جراء غياب المقاربة ما بين قطاعي السياحة والبنوك، الأمر الذي جعل المؤسسات السياحية تخسر الكثير من زبائنها، فغياب الدفع الالكتروني في الجزائر يعتبر من بين أهم العوامل الأساسية التي تدفع المستهلك السياحي الالكتروني إلى ارجاء عملية الشراء، وهذا له أثر سلبي مباشر على المؤسسة السياحية وهو يعتبر أيضا من بين أهم الأسباب التي تدفع بالسائح إلى تغيير وجهته السياحية.

5.2. الجهود المبذولة للنهوض بالقطاع السياحي الرقمي في الجزائر

تسجل اليوم إرادة حقيقة من القائمين على القطاع في تجسيد المخطط السياحي التوجيهي، بالرغم من التخلف الكبير الذي شهده طيلة السنوات السابقة وادراكهم أن "ريج معركة الرقمنة وتعميمها على كل النشاطات السياحية والفندقية ليست خيارا بل أصبح ضرورة ملحة لتدعيم تنافسية العروض السياحية الوطنية داخليا وخارجيا مما يستلزم على كل المتعاملين استعمال الأرضيات الرقمية العصرية فيما يلي أهم الجهود المبذولة في مجال الرقمنة: (محسن و بلحيمر، 2023، الصفحات 181-182)

- مرا افقة كل المشاريع والمبادرات التي تصب في هذا المنوال وتساعد على استعمال الابتكار التكنولوجي لترقية الوجهة السياحية الجزائرية "وفك العراقيل التي يعاني منها القطاع ليست تابعة من القطاع وحده بل هي وليدة محيط عام يتعامل سلبا مع قطاع السياحة علما بأن نجاعة النشاط السياحي مرتبطة إلى حد بعيد بمستوى مرافقة دعم

المحيط الاقتصادي والمؤسساتي والاجتماعي له"، تنظيم ورشات تناول "جاذبية الوجهة السياحية الجزائر" و"الترقية والتسويق السياحي" و"ادارة الفنادق ودعم الاستثمار السياحي" و"تأثير الرقمنة على مؤسسات قطاع السياحة".

- انشاء البوابة الإلكترونية: تم إطلاقها خلال السنة 2021، شملت الإرشاد السياحي والتعريف بالاستثمار الفندقي واستغلال المياه الحموية بمشاركة قطاعات الثقافة والفنون والشؤون الدينية والأوقاف والمجاهدين وذوي الحقوق والشباب والرياضية الترويج للمنتج السياحي، باستقطاب السياح إلى كل المناطق المؤهلة لاستئناف النشاط السياحي لمواكبة أكبر للتطورات في مجال الرقمنة والترويج للسياحة عبر وسائط التواصل الاجتماعي؛
- اعتماد صبغة الإيواء لدى الساكن في مجال توسيع التكفل بالسائح: تمت الإعلان عنها بولاية بسكرة وطبقت بالموقع الأثري "الدشرة الحمراء" ببلدية القنطرة، ومشاركة الجماعات المحلية لإقحام السكان المحليين في النشاط السياحي من خلال عروض الصناعات التقليدية لهياكل الاستقبال السياحية العمومية والخاصة استحداث مناصب شغل في أوساط العائلات؛
- المشاركة في الفعاليات والتظاهرات السياحية الدولية والاستفادة من التجارب الدولية الرقمية في آخر مشاركتها كضيف شرف ممثلة في "الديوان الوطني للسياحة" رفقة وفد من المتعاملين السياحيين في فعاليات الطبعة 28 للصالون الدولي للسياحة والأسفار «Mitt Masco» المنظم بالعاصمة الروسية موسكو عرفت مشاركة 20 دولة تم توزيع وعرض مجموعة من الدعائم الالكترونية الترويجية على الزوار للتعريف بالمقومات السياحية بتقنية ثلاثية الأبعاد للتعريف أكثر بتفاصيل الوجهات السياحية الجزائرية.
- تنظيم مسابقة أحسن عمل في المجال السياحي نظمت هذه الطبعة الثانية الجوائز السياحة الجزائرية" تحفيز المتعاملين والمهنيين للعمل على تحسين وتطوير خدماتهم ومؤسساتهم الفندقية مساهمة السياحة الداخلية بالارتقاء بالخدمات السياحية وضرورة مراجعة سياسة الاسعار الحالية لخلق تنافسية حقيقية بين المستلمين أحسن نشاط فندقي ترويجي".
- الاعتماد على اقتصاد المعرفة بتفعيل حوكمة اقتصادية تعمل على إعادة التوازن للسوق السياحية الذي يضم مشاركة أكثر من عشر قطاعات أخرى على غرار النقل والثقافة البيئية...وتفعيل من المهن والحرف، على غرار الصناعات التقليدية، الفلاحة ترويج لأكلات الشعبية كما وجب استشراف مستقبل السياحة بخلق التنافسية خصوصا في مجال الأسعار التي يعيب القطاع يفتح المجال امام الاستثمار السياحي الرقمي ونموذج وكالات السفر تشجيع المحتوى السياحي واستيعاب التراث اللامادي من طرف المؤسسات الحكومية من اجل التنمية المحلية الإقليمية والدولية؛
- الانفتاح على العالم الخارجي عبر رقمنة التنوع السياحي على غرار السياحة الدينية والعلاجية والتاريخية وغيرها من الأنماط التي يمكن أن نعتمد عليها لتطوير مداخل الجزائر من العملة الصعبة لكون النشاط السياحي خادما للقطاعات الأخرى، التجارية في تلك المنطقة، من خبازين وجزارين وأسواق الخضار والفواكه والصناعة التقليدية والأشغال اليدوية ثقافية التي اتبين مدى تحدر المكان عبر التاريخ الإنساني، كما ينشط أيضا عمل وسائل النقل،

ويعطي فرصة لفتح مناصب الشغل لكل فئات العمرية من المجنسين، وهكذا نكون قد احتفظنا ب 12 مليار دولار التي تخرج من الخزينة العمومية سنويا.

- استحداث منصب "نمليتيك": انشأت في أبريل 2019 واجهة رقمية لحجوزات الفنادق عبر الانترنت تساعد على وصل الزبون بالفندق الذي يرغب في الإقامة به، hotel.namlatic.com هي منصة آمنة وفعالة بداية من تأكيد الحجز بشكل فوري، مروراً بالدفع عن طريق بطاقة الائتمان أو التحويل المصرفي. ويمكن للزبون أيضاً إلغاء حجزه في أي وقت دون عواقب مالية من بين المزايا الأساسية التي تتمتع بها هذه المنصة اقتراحها الخارطة فنادق تمتد نحو أكثر من 30 مدينة جزائرية لحد الآن، كما أوجدت حلولاً عن بعد سواء عبر الانترنت بالنسبة إلى البطاقات المصرفية، أو عن طريق الدفع المصرفي بالإضافة إلى تفعيل خيار الدفع بالنسبة للزبائن الذين لا يملكون الخبرات السابقة، كذلك تقترح المنصة على مستخدميها من سياح ومؤسسات فندقية خيار الدفع المسبق بنسبة 25 % بهدف تأكيد الحجز وتنظيم الإقامة بشكل آمن لكلا الطرفين.

6.2. معوقات التسويق السياحي الرقمي في الجزائر

لا تزال القدرة التنافسية للسياحة الجزائرية لا تسجل المراتب المراد الوصول إليها، حيث احتلت المرتبة 98 عالمياً في مؤشر تطوير السفر والسياحة لعام 2024 الصادر عن المنتدى الاقتصادي العالمي، وهناك مجموعة من المعوقات التي تحد من نمو هذا القطاع ونلخصها في النقاط التالية: (نهار و لحول، 2019، صفحة 117)

- صعوبة توفير البنية التحتية المناسبة لسياحة رقمية؛
- صعوبة توفير بيئة قانونية وتشريعية تتسم بالشفافية والمرونة؛
- تحديد إطار واضح للاعتراف بالتوقيع أو الامضاء الالكتروني؛
- وضع سياسات أو قواعد عامة يكون الهدف منها حماية المستهلك والمحافظة على حقوقه.

3. الخلاصة

إن استخدام التسويق الرقمي في قطاع السياحة يعد خيار ولكنه أيضاً التزام إلى حد ما، فمن خلال عرضنا وتحليلنا لموضوع التحول الرقمي للقطاع السياحي في الجزائر، نجد أن السياحة الالكترونية ورقمنة القطاع السياحي في الجزائر أضحت حتمية ملحة، ودعامة في كل المجالات، لذلك وجب على الدولة الجزائرية وضع خطط واستراتيجيات لضمان نجاح عملية التحول الرقمي في القطاع السياحي، وذلك بوضع مختلف الخطط والاستراتيجيات لضمان هذا النجاح. مشروع رقمنة القطاع السياحي في الجزائر مزال في مراحله الأولى، وما تم إنجازه لا يتعدى كونه تطبيقات فرعية حول رقمنة بعضه، وذلك نتيجة صعوبات وعراقيل قد تكون مادية بشرية أو تنظيمية. من خلال تقديمنا لهذه الدراسة تمكنا من التوصل إلى النتائج التالية:

- تساعد الرقمنة في القطاع السياحي على تقديم خدمات سياحية ممتازة متكاملة من خلال ما تتيحه تكنولوجيا المعلومات والاتصال؛
- أصبحت السياحة المدعومة بالتسويق الرقمي ضرورة وبديلاً منطقياً للسياحة التقليدية في الجزائر

- صعوبة التحول الرقمي في القطاع السياحي في الجزائر؛
 - تحتاج السياحة الالكترونية، الى الاشراف عليها من طرف هيئة وطنية من خلال بوابة الكترونية جامعة لمختلف المنتجات والخدمات السياحية في الجزائر؛
 - نجاح التسويق السياحي الالكتروني في الجزائر، يعتمد على العديد من المتطلبات منها: التنظيمية، البشرية والبنية التحتية.
- من خلال ما سبق يمكن تقديم التوصيات التالية:
- ضرورة الإصلاح المصرفي من خلال تحديث وسائل الدفع الالكتروني والتوسع في استخدام بطاقات الائتمان؛
 - وضع خطط واستراتيجيات شاملة على المدى البعيد والقريب والسعي لإنجاحها، لرقمنة القطاع السياحي في الجزائر؛
 - العمل على الترويج ونشر ثقافة أهمية السياحة الالكترونية لدى أفراد المجتمع الجزائري، وذلك من خلال تنظيم ملتقيات وأيام دراسية، تعمل على القضاء على عامل الخوف والتردد من استعمال هذه التكنولوجيا الحديثة، وإبراز إيجابياتها على مستوى تحسين الخدمات المقدمة؛
 - ضرورة توفير تشريعات قانونية تنظم وتحمي عملية التحول الرقمي في القطاع السياحي في الجزائر؛
 - التوسع في استخدام تطبيقات تكنولوجيا الانترنت في قطاع السياحة والخدمات الأخرى؛
 - الاعتماد على المؤثرين الرقميين وتدعيمهم للتعريف وتشجيع السياحة الوطنية؛
 - ضرورة التأهيل والتكوين المتواصل للموظفين في المؤسسات السياحية في مجال التقنيات الحديثة.

بيان الإفصاح

لم يُبلِّغ المؤلفان عن أي تضارب محتمل في المصالح.

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The Role of Sports in Developing Citizenship Values Among University Students: A Field Study at Mohamed Lamine Debaghine University, Sétif 2, Algeria

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Abstract

The aim of this study was to know the role of sport in establishing the values of citizenship among university youth. Where the study tool was used in the survey questionnaire on a sample of 262 university students. The descriptive approach and the arithmetic mean were used as a statistical method to present the results. Play a role in entrenching both the value of participation, the value of national belonging, the value of acceptance of difference, the value of responsibility, to a high degree.

Keywords: Values of Citizenship, Value of Participation, Value of National Affiliation, Value of Acceptance of Difference, Value of Responsibility, University Youth

دور الرياضة في تنمية قيم المواطنة لدى الطلبة الجامعيين: دراسة ميدانية بجامعة محمد لمين دباغين سطيف 02 بالجزائر

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ملخص

هدفت هذه الدراسة إلى معرفة دور الرياضة في ترسيخ قيم المواطنة لدى الشباب الجامعي، أين تم تطبيق أداة الدراسة ممثلة في إستبيان الدراسة على عينة مكونة من 262 طالب جامعي، وقد تم الإعتماد على المنهج الوصفي وعلى المتوسط الحسابي كأسلوب إحصائي لعرض النتائج، أين توصلنا أن الرياضة تلعب دورا في ترسيخ كل من قيمة المشاركة بمتوسط حسابي بلغ 0.78، قيمة الانتماء الوطني بمتوسط حسابي بلغ 0.79، قيمة تقبل الاختلاف بمتوسط بلغ 0.91، قيمة المسؤولية بمتوسط بلغ 0.73، وهي متوسطات مرتفعة.

الكلمات المفتاحية: قيم المواطنة، قيمة المشاركة، قيمة الانتماء الوطني، قيمة تقبل الاختلاف، قيمة المسؤولية، الشباب الجامعي

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تسمح هذه الرخصة بالاستخدام غير التجاري، وينبغي نسبة العمل إلى صاحبه، مع بيان أي تعديلات عليه. كما يتيح حرية نسخ، وتوزيع، ونقل العمل بأي شكل من الأشكال، أو بآلة وسيلة، ومزجه وتحويله والبناء عليه، طالما يُنسب العمل الأصلي إلى المؤلف.

مقدمة وإشكالية الدراسة

إن الرياضة اليوم ينظر لها على أنها قادرة على تحسين حياة الأفراد والمجتمعات، من خلال ما تحدثه من آثار اجتماعية إيجابية، وفي ظل إجراء العديد من الدراسات حول الأثر الاجتماعي والثقافي والرياضي للرياضة (تايلور وآخرون، 2015)، التي خلصت أن الرياضة قد انتقلت من مجرد موقع استراتيجي إلى موقع ذي أهمية في مجالات عديدة، كالصحة، والجريمة، والتعليم، والرفاهية الشخصية، كما تناولت دراسات أخرى القيمة النقدية للنتائج الاجتماعية الناتجة عن الرياضة في سياق مجتمعي، وتستخدم الدراسات بشكل أكثر شيوعاً مناهج غير نقدية لقياس الأهمية النسبية للنتائج الاجتماعية (Eko Purnomo, Amung Ma'mun, Nurlan Kusmaedi, Yudy Hendrayana, Nina Jermaina, Akhmad Amirudin, Nessya (Fitryona, Dwi Mutia Sari, 2024, p144).

تحتل الرياضة في عصرنا المعاصر بأهمية بالغة لما لها من فوائد اقتصادية وسياسية واجتماعية وثقافية. فمن خلالها، يكتسب الفرد ذاته وهويته، لما لها من دور اجتماعي ووطني، بل وعالمي مهم. فعلى المستوى الفردي، تُعزز الرياضة القدرات المعرفية، بينما تُسهم على المستوى الوطني في النمو الاقتصادي والاجتماعي، وتطوير الصحة العامة، وتوحيد المجتمعات المتنوعة. ولا يقتصر هدف التربية البدنية والرياضة على تنمية الفرد جسدياً فحسب، وهو ليس هدفهما الأساسي، بل إن هدفهما أسمى، وهو التركيز على التنمية المتوازنة للفرد في الجوانب البدنية والأخلاقية والعقلية والاجتماعية والنفسية. علاوة على ذلك، يكتسب الأفراد معارف تتعلق بالصحة، كالنظافة والسلوك الصحي، ويوسعون مداركهم العامة من خلال التفاعل والتواصل مع مختلف المجتمعات الخارجية، مما يُعزز التفاعل الاجتماعي. كما يمكن أن تكون الرياضة والتربية البدنية بمثابة مجالات لممارسة المساواة والحرية والتحكم في الجسم أثناء الأنشطة الرياضية (Mohammed Qasim MOHAMMED, Maan (Hasan MAHMOOD, Moatasem Azeez KAHLID, Maad Abed IBRAHIM , 2025, p1064) قيم المواطنة بواسطة الرياضة اليوم أضحت "جزءاً لا يتجزأ من سياسات وممارسات التعليم العالي، استجابةً للتحديات العالمية الملحة وحاجة الخريجين إلى الاستجابة لهذه التحديات" (Madeleine Pownall , Pam Birtill and Richard Harris, 2024, p2).

تمثل منظومة القيم إحدى المكونات الأساسية لطبيعة السلوك الحيادي للإنسان في أي مجتمع من المجتمعات منذ القدم وحتى هذا العصر، فهي الوسيلة الوحيدة والملائمة لقيام الروابط المتعددة بين الناس، كما أنها المحرك للحياة الإنسانية، فتتأرجح الحياة بين القيم الإيجابية والسلبية، فإذا تغلبت الأولى إستمرت حياة الأمم والشعوب في تطور وعطاء، وإن حدث العكس كانت الأنانية والركود، والزهد في العمل والتخلف وعدم الإستقرار (الخطيب، 2010، ص18).

إن عملية تنمية المواطنة من العمليات المعقدة، لأنها تعتمد على عوامل كثيرة منها ما هو نفسي وما هو اجتماعي، وسياسي وثقافي، وهي عوامل مهمة يجب مراعاتها من قبل المربين في المجتمع حتى تتم تنمية المواطنة بشكل أكثر إيجابية وفاعلية (الموشي، تغريد، 2016، ص62)، وهي بذلك تمثل جميع المعايير والممارسات التربوية التي تسعى إلى إدماج الأجيال القادمة في مجتمع الأمة، ومن هذا المنظور، تُعدّ تنمية المواطنة عمليةً مستقبليةً مستمرةً، تسترشد برؤى المجتمع المنشود (A.El Moussaouya, b, A. Errahmanic, M. Daoudid, A. Ouariacha, A. Hachmia, b , O. Mommadi a, 2021, p75).

لقد باتت تنمية وتعزيز قيم المواطنة إحدى سبل مواجهة تحديات القرن الحادي والعشرين، فالتقدم الحقيقي للمجتمعات في ظل تحديات القرن الحادي والعشرين ومستجداته تصنع عقول وسواعد المواطنين، ومن ثم فإن إكسابهم قيم المواطنة يعد الركيزة الأساسية للمشاركة الإيجابية والفعالة في التنمية الاجتماعية والاقتصادية والسياسية لكل من الفرد والمجتمع (الحربي، 2016، ص4).

ولأن الشباب الجامعي يتميز بخصائص وعوامل تساهم في تكوين المواطنة الصالحة لديه منها: الفاعلية والديناميكية، الرؤية للمستقبل، النضج العقلي وإدراك المتغيرات المحيطة، فهم مقومات السلم والوفاق الاجتماعي وحسب عمارة 2005 أن الهدف من الإلزام بقيم المواطنة هو المحافظة على البناء الاجتماعي سليما ومستقرا ومتكاملا (ميهوبي، بوطبال، 2014، ص70).

إن الرياضة جز لا يتجزأ من التربية، سواء أكانت بدنية أم ذهنية إذ أنها تتيح إكساب وتبادل مهارات قيادية قد تدرس نظريا في المدرجات ولكن يجب ترسيخها من خلال التجربة في الملاعب الرياضية والحياة المجتمعية، وإن تدريب الطلاب جيدا على هذا النوع من المهارات سيؤدي إلى نشأة جيل من المدافعين القادرين على تنمية مشروع التعليم من خلال الرياضة والمواطنة، وتعزيز أثره، وعليه يتعين على الجامعة أن تدرب صناع قرارات الغد على إدراك الأهمية الحاسمة التي يكتسبها ربط التربية البدنية والرياضية بسياسات إقتصادية اجتماعية لا تقتصر على التعليم وسيؤدي ذلك إلى ترسيخ وإثرا مهارات هؤلاء المواطنين بالثقة والمسؤولين اجتماعيا (المجلس التنفيذي، 2015، ص7).

يمكن للرياضة أن تكون بهذا المعنى مجالا معرفيا يُعزز قيم المواطنة، التي تُفهم على أنها مجموعة من المهارات والمعارف والقيم التي تُمكن الأفراد من أن يكونوا جزءا فاعلا من المجتمع. تشمل هذه الكفاءات احترام حقوق الإنسان، وتشجيع الحوار والوساطة، والقدرة على اتخاذ قرارات مستنيرة، والالتزام بالعدالة الاجتماعية، والمشاركة الفعالة في الحياة الديمقراطية (Jayson Andrey Bernate, Sandra Consuelo Puerto Garavito, 2023, p e205).

ولأن الرياضة تلعب اليوم دورا بارزا في تنمية قيم المواطنة لدى الكثير من فئات المجتمع أين تسعى من خلال الأنشطة والممارسات التي تتم إلى توعية ممارسيها بمجموعة من القيم هادفة إلى تغيير بعض السلوكيات السلبية وتعزيز السلوكيات الإيجابية لدى الرياضيين بمختلف مستوياتهم.

فالرياضة كأحد الأنشطة التي يمارسها الأفراد في حياتهم اليوم سواء بصورة منتظمة رسمية أو بصورة غير منتظمة غير رسمية تلعب الدور الأساسي في تحديد الكثير من السلوكيات التي يقوم بها الأفراد وتعكس بشكل أو بآخر الكثير من أنماط الحياة الممارسة في المجتمع، وهو ما جعل الكثير من المؤسسات تهتم بها كنشاط في محاولة لزراعة بعض القيم والأخلاق في الناشئة من خلالها.

كما أنها كأحد الأنشطة تساهم بطريقة أو بأخرى في التنشئة الاجتماعية من خلال بلورة وتكوين شخصية الأفراد في المجتمع وهو ما جعل أطراف ومؤسسات المجتمع تهتم بها وتولمها العناية من منطلق مجابهة الآفات الاجتماعية والمساهمة في إندماج الكثير من الفئات الاجتماعية في الوسط الاجتماعي.

ولأن الطالب هو ركيزة المجتمع فإن إيلاؤه العناية الكاملة من خلال توفير مختلف المرافق التي تلعب الدور المحوري في مرافقه نفسيا واجتماعيا، والتي تعد المنشآت الرياضية أحدها، ولعل مشاركة الشباب في البعض من الأنشطة الرياضية

يساهم من خلال البرامج المتوفرة في غرس الكثير من القيم، خاصة وأن الكثير من الدراسات تؤكد ذلك الدور الذي تلعبه الرياضة في بناء شخصية الفرد، مما جعل الكثير من المنظمات العالمية توصي بممارسة الرياضة بمختلف أشكالها لما لها من فوائد جسدية ونفسية واجتماعية.

لقد أكدت بعض الدراسات السابقة أهمية الرياضة في تعزيز قيم المواطنة لدى الشباب كما هو الحال لدراسة مروة مسعودي وعاتكة غرغوط 2022، حول الأنشطة الرياضية ودورها في تعزيز قيم المواطنة لدى الشباب، والتي هدفت للكشف عن درجة مساهمة الرياضة في تعزيز المفاهيم القيمية والتربية على المواطنة. وقد توصلت الدراسة إلى أن مساهمة الرياضة إيجابا في تأكيد المفاهيم القيمية والتربية على المواطنة من خلال مجال رفع الروح المعنوية، وتعزيز الهوية الوطنية، ومجال تعزيز قيم التميز والإرادة والطاقات الإيجابية، إذا ما استخدمت الرياضة بصورة صحيحة، يمكن أن يكون لها دور إيجابي طويل الأمد على التنمية الصحية العامة والسلم والبيئة، كما تبين أن الرياضة بجميع أنشطتها هي الأرضية لتعلم الانضباط والثقة بالنفس وروح القيادة (مسعودي، غرغوط، 2022، ص545)، ولعل دراسة براهيم قنور، وبن ساسي سليمان 2021 حاولت تحديد دور الرياضة المدرسية في تنمية قيم المواطنة لدى تلاميذ الطور الثانوي، أين تم تطبيق الدراسة على عينة مكونة من 100 تلميذ وتلميذة، وخلصت الدراسة إلى أن الرياضة تساهم في تنمية قيم المواطنة لدى تلاميذ المرحلة الثانوية (براهيمي، بن ساسي، 2022، ص440)، وقد اختلفت دراساتنا الحالية عن الدراسات السابقة في طبيعة عينة الدراسة التي طبقت عليها أداة الدراسة، كما اختلفت من حيث المنهج والأدوات المستخدمة وهو ما جعل الدراسات السابقة تمثل لدراساتنا الحالية منفذا أساسيا للإنطلاق في الدراسة من خلال النتائج المتوصل إليها.

وبالنظر لأهمية والدور الذي تلعبه الرياضة في العديد من المجالات والمناحي الحياتية للطلاب، فإن دراستنا الحالية اتجهت لمعرفة دور الرياضة في تنمية قيم المواطنة لدى الطلبة الجامعيين إنطلاقا من إشكالية مفادها:

ما دور الرياضة في تنمية قيم المواطنة لدى الطالب الجامعي؟.

والتي تفرع منه عدة أسئلة أهمها:

ما دور الرياضة في تنمية قيمة المشاركة لدى الطالب الجامعي؟.

ما دور الرياضة في تنمية قيمة الانتماء الوطني لدى الطالب الجامعي؟

ما دور الرياضة في تنمية قيمة تقبل الاختلاف لدى الطالب الجامعي؟

ما دور الرياضة في تنمية قيمة المسؤولية لدى الطالب الجامعي؟.

فرضيات الدراسة

- تلعب الرياضة دورا في تنمية قيمة المشاركة لدى الطالب الجامعي.
- تلعب الرياضة دورا في تنمية قيمة الانتماء الوطني لدى الطالب الجامعي.
- تلعب الرياضة دورا في تنمية قيمة تقبل الاختلاف لدى الطالب الجامعي.
- تلعب الرياضة دورا في تنمية قيمة المسؤولية لدى الطالب الجامعي.

أهداف الدراسة

- تحديد دور الرياضة في تنمية قيمة المواطنة لدى الطالب الجامعي.
- تحديد دور الرياضة في تنمية قيمة المشاركة لدى الطالب الجامعي.
- تحديد دور الرياضة في تنمية قيمة الانتماء الوطني لدى الطالب الجامعي.
- تحديد دور الرياضة في تنمية قيمة تقبل الاختلاف لدى الطالب الجامعي.
- تحديد دور الرياضة في تنمية قيمة المسؤولية لدى الطالب الجامعي.

حدود الدراسة

لقد تمت الدراسة بجامعة محمد لمين دباغين سطيف 02 بالجزائر خلال السنة الجامعية 2024-2025، أين تم تطبيق أداة الدراسة بشكل مباشر ما بين الباحثين والمبحوثين من طلبة الجامعة عينة الدراسة.

تحديد مصطلحات الدراسة

القيم: وهي الدافع الإيديولوجي الذي يؤثر في أفكار الإنسان وسلوكه، أو هي ضوابط سلوكية تتأثر بأفكار ومعتقدات الإنسان وهذه الضوابط تضع سلوك الإنسان في قالب معين يتمشى مع ما يريده المجتمع ويفضله (حنون، 2017، ص72).

المواطنة: وهي الانتماء إلى تراب الوطن الذي يتحدد بحدود جغرافية ويصبح كل من ينتهي إلى هذا التراب مواطناً له من الحقوق ما يترتب على هذه المواطنة وعليه من الواجبات ما تمليه عليه ضرورات الإلتزام بعمليات هذه المواطنة (العوامرة، الزبون، 2014، ص193).

قيم المواطنة: هي الشعور بالانتماء والولاء للوطن وللقيادة السياسية التي هي مصدر الإشباع للحاجات الأساسية وحماية الذات من الأخطار المصيرية" (المليح، الجشعبي، عامر، 2017، ص35).

قيمة المشاركة: تعني تفاعل الفرد عقلياً وإنفعالياً في موقف الجماعة بطريقة تشجعه على المساهمة في تحقيق أهداف الجماعة المشاركة في تحمل المسؤولية (بدوي، 1993، ص10).

قيمة الانتماء الوطني: إن من لوازم المواطنة الانتماء للوطن فالانتماء في الإصطلاح هو الإنتساب الحقيقي للدين والوطن فكراً تجسده الجوارح عملاً، والانتماء هو شعور داخلي يجعل المواطن يعمل بحماس وإخلاص للإرتقاء بوطنه والدفاع عنه (القواسمة، 2014، ص36).

قيمة تقبل الاختلاف: تعني أن الشاب يتقبل مختلف الآراء والأفكار التي تطرحه أمامه أين يناقشها بكل موضوعية ودون تعصب لرأيه الخاص، كما أنه يتقبل مختلف الأطراف التي تختلف معه حيث لا يتدخل بأي صفة في الآخرين.

قيمة المسؤولية: تعني إلتزام المرء بالقوانين وتقاليد ونظم المجتمع الذي يعيش فيه، وتقبله لما ينتج عن مخالفته لها، فهي تتعلق بمسؤولية المواطن وعلاقته بربه ثم مع نفسه، وعلاقته بمجتمعه ووطنه، كذلك علاقته تجاه الأنظمة والقوانين، فهي تعني إلتزام الشخص أمام هذه الأطراف بما يحقق الصالح العام (القحطاني، 2016، ص32).

الشباب الجامعي: لقد اختلف العلماء حول تحديد مفهوم الشباب نظراً لإختلاف تخصصاتهم، فمنهم من حدد هذه المرحلة بمعيار سلوكي تتشكل فيه الإتجاهات السلوكية المميزة لهذه المرحلة، ومنهم من حددها بمعيار زمني، وآخر بمعيار

إجتماعي يتمثل في قدرة وسعي الشباب نحو إحتلال مكانة إجتماعية والقيام بمجموعة من الأدوار تؤهله للحياة، وهناك من حددها بمعيار عقلي تتمثل في نمو العمليات العقلية مثل التذكر والتخيل، والإدراك والتفوق والقدرة على إتخاذ القرار وحرية الإختيار، وبالرغم من إختلاف وجهات النظر حول تحديد المرحلة العمرية لها، إلا أن معظم الآراء إتفقت على تحديدها بين 15-32 سنة (الخمشي، الشلهوب، 2012، ص 145).

منهج الدراسة

لقد تم الإعتماد على المنهج الوصفي كمنهج للدراسة وذلك لملائمته لطبيعة مشكلة الدراسة التي نحن بصدد دراستها، ويعرف المنهج الوصفي بأنه "أسلوب من أساليب التحليل المرتكز على معلومات كافية ودقيقة عن ظاهرة أو موضوع محدد من خلال فترة أو زمنية معلومة، وذلك من أجل الحصول على نتائج عملية تم تفسيرها بطريقة موضوعية وبما ينسجم مع المعطيات الفعلية للظاهرة (عبيدات وآخرون، 1999، ص 46)، وهذا فهو يتعدى حدود جمع البيانات حول الظاهرة المدروسة إلى تحليلها في محاولة لمعرفة علاقتها بالظواهر الأخرى.

عينة الدراسة

تم توزيع أداة الدراسة على عينة من الطلبة الجامعيين المنتمين لكلية العلوم الإنسانية والإجتماعية جامعة محمد لمين دباغين سطيف 02، وقد كان إختيار عينة الدراسة بصورة قصدية عن طريق المعاينة القصدية، ولقد تم اللجوء لهذا النوع من العينة لإعتبارات تتعلق بالطلبة الذين يمارسون الرياضة إين تم إستبعاد الطلبة الذين لا يمارسون الرياضة، إضافة إلى إختيار الطلبة الذين قبلوا الإجابة على إستبيان الدراسة والذين يمارسون الرياضة وهو ما جعل العينة قصدية، وقد تم توزيع 300 إستبيان في حين تم إسترجاع 262 إستبيان، ويمكن وصف خصائص عينة الدراسة في الجدول التالي رقم (01).

السن	التكرار	الجنس		المستوى الدراسي		
		أ	ذ	أولى	ثانية	ثالثة
21-18	69	19	15	13	10	7
24-21	74	20	20	11	8	8
27-24	56	14	10	5	8	11
30-27	44	10	8	4	7	8
30 فما فوق	19	5	10	2	2	5
المجموع	262	47	36	19	22	22

جدول رقم (01) يبين وصف عينة الدراسة

أدوات جمع البيانات في الدراسة

من أجل تحقيق أهداف الدراسة وللتأكد من الفرضيات فقد تم بناء إستبيان خاص بقياس دور الجمعيات في تنمية قيم المواطنة لدى الطالب الجامعي وذلك إعتقاداً على الدراسات السابقة والتراث النظري الذي كتب حول قيم المواطنة، وقد شمل الإستبيان 39 بند أين تم تقسيم الإستبيان إلى أربعة محاور تمثلت في دور الجمعيات في:

- قيم المشاركة السياسية الذي إحتوى على 10 بند.
- قيم الانتماء الوطني الذي إحتوى على 09 بند.
- قيم تقبل الاختلاف الذي إحتوى على 13 بند.
- قيم المسؤولية الذي إحتوى على 07 بند.

وللتأكد من صدق الإستبيان فقد تم عرضه على مجموعة من أساتذة علم النفس والعلوم التربوية حيث بلغ عدد الأساتذة المحكمين 07 أساتذة، وقد تم الأخذ بعين الإعتبار بجميع ملاحظات المحكمين أين بلغ معامل الصدق 0.78، كما تم حساب معامل الثبات إعتقاداً على معامل ألفا كرونباخ والذي بلغ 0.88، وهو ما يؤكد لنا أن الإستبيان صادق وقابل للتطبيق على عينة الدراسة.

الأساليب الإحصائية المستخدمة في الدراسة

تم استخدام الاحصاء الوصفي أين تم الإعتداد على المتوسط الحسابي وهو أكثر الأساليب الإحصائية المناسبة في مثل هذه الدراسة.

عرض نتائج الدراسة ومناقشتها

عرض نتائج الفرضية الإجرائية الأولى: هناك دور تلعبه الرياضة في تنمية قيمة المشاركة لدى الطالب الجامعي.

الرقم	العبارات	المتوسط الحسابي	الترتيب	التقدير
1	الرياضة تنمي لدي حب العمل مع الآخرين	0.84	5	مرتفع
2	من خلال ممارستي للرياضة أحرص على مشاركتي في الأعمال التطوعية	0.89	2	مرتفع
3	ممارسة الرياضة تشجعني على التمسك بمبادئ الديمقراطية	0.57	10	متوسط
4	أشارك في إحياء المناسبات الوطنية من خلال المشاركة في النشاطات الرياضية التي تدخل ضمن الإحتفالات	0.85	4	مرتفع
5	أواكب جميع مجريات الأحداث الوطنية من أعياد واحتفالات من خلال نشاطي الرياضي	0.89	2	مرتفع
6	أحرص على المشاركة في مختلف التظاهرات الوطنية المنظمة من طرف الدولة	0.83	7	مرتفع
7	أحرص على تنظيم مسابقات رياضية لترسيخ قيم المواطنة في الطلبة	0.84	5	مرتفع
8	أخلد جميع الذكريات الوطنية من خلال النشاط الرياضي	0.92	1	مرتفع

متوسط	8	0.61	ممارسة الرياضة تجعلني مطلع على بتاريخ الجزائر	9
متوسط	9	0.60	حين أمارس الرياضة أخصص جزء من وقتي للحديث عن الوطنية	10
مرتفع	0.78		المجموع	

جدول رقم (02) يرصد نتائج الفرضية الإجرائية الأولى.

التعليق ومناقشة النتائج

من خلال النتائج المبينة في الجدول أعلاه يتبين لنا أن الرياضة تلعب دورا في مجال تنمية قيم المشاركة السياسية لدى الطالب الجامعي عينة الدراسة أين بلغ متوسطها الحسابي 0.78، وهو ما نلمسه من خلال الدور الذي تلعبه الرياضة في تخليد جميع المناسبات الوطنية بمتوسط بلغ 0.92 وترتيب أول، ذلك أن الطالب يقوم بالعديد من النشاطات الرياضية التي تكون أساسها تزامنا مع الاحتفالات المخددة للمناسبات الوطنية، وهو ما يجعل هذه المناسبات تترسخ لدى الشاب الجامعي عن طريق الرياضة كنشاط، كما أن الرياضة تدفع الطالب للمساهمة في العمل التطوعي بمتوسط بلغ 0.89 وترتيب ثاني، ذلك أن الرياضة تعلم الطالب بعض المبادئ الخاصة بالتضحية وهو ما يجعله يساهم في الأعمال التطوعية إيمانا منه بالدور المنوط بالرياضة في هذا الشأن، كما أن الطلبة يواكبون جميع مجريات الأحداث الوطنية من أعياد واحتفالات من خلال النشاط الرياضي بمتوسط بلغ 0.89 خاصة وأن الكثير من النشاطات الرياضية خاصة ما تعلق بالمنافسات والمسابقات والدورات الرياضية عادة ما يكون تزامنا مع تنظيمها مع أعياد أو إحتفالات وطنية معينة، مما يجعل الطالب تترسخ لديه رمزية معينة بسبب الرياضة، كما أنه يشارك في إحياء المناسبات الوطنية من خلال المشاركة في النشاطات الرياضية التي تدخل ضمن الإحتفالات وهو ما يمكن ملاحظته في مثل هذه المناسبات وذلك بمتوسط بلغ 0.85 حسب عينة الدراسة، ولعل الرياضة تنمي لدى الطالب حب العمل مع الآخرين بمتوسط بلغ 0.84 خاصة وأن الرياضة تحث على العمل الجماعي ضمن الفريق بالنسبة للرياضات الجماعية التي يمارسها الشباب، كما أنها تشجع الطلبة على تنظيم مسابقات ودورات رياضية لترسيخ قيم المواطنة وهو ما نسجله في الكثير من الدورات الرياضية التي يكون هدفها تعميق الوطنية لدى الطلبة بمتوسط بلغ 0.84، ولعل حرص الطلبة على المشاركة في مختلف التظاهرات الوطنية المنظمة من طرف الدولة بمتوسط بلغ 0.83 يؤكد لنا من جهة أخرى ذلك الدور الذي تلعبه الرياضة في ترسيخ قيم المشاركة لدى الطلبة في مختلف التظاهرات الوطنية التي تنظم من طرف أجهزة الدولة المختلفة، ولعل الرياضة تلعب دورا متوسطا في عملية تعريف الطلبة بتاريخ الجزائر بمتوسط 0.61 وكذلك من حيث الحديث عن الوطنية في ظل الرياضة بمتوسط 0.60، فالأنشطة الرياضية "جزء من حياة الكثير من الأفراد مما توفر لهم فرصة للمشاركة بالمجتمع، وتحطيم الحواجز والإختلافات الثقافية بين الأفراد والمساهمة في بناء الهوية المجتمعية وتكوين صداقات وتطوير شبكة العلاقات والتقليل من العزلة الإجتماعية فالرياضة تتطلب العمل مع الآخرين لتحقيق قيم المواطنة وتطويرها" (أسيل قاضي، محمد الكعبي، جمال أبو بشارة، عبد الرؤوف بن عبد الرحمن، 2024، ص116) وهو ما يجعل تساهم في تعزيز قيم المشاركة، وما يمكن تأكيده أن النتائج المتوصل إليها تؤكد لنا أن هناك العديد من الأدوار التي تلعبها الرياضة فيما يخص عملية تنمية قيم المشاركة لدى الطالب الجامعي.

عرض نتائج الفرضية الإيجابية الثانية: هناك دور تلعبه الرياضة في تنمية قيمة الانتماء الوطني لدى الطالب الجامعي.

الرقم	العبارات	المتوسط الحسابي	الترتيب	التقدير
11	تسعى الرياضة إلى نشر ثقافة المواطنة في أوساط الطلبة	0.97	1	مرتفع
12	تجعل الرياضة من الطالب مضطلع بإحترام العادات والتقاليد	0.60	9	متوسط
13	تعزز الرياضة شعور الطالب بالانتماء للوطن	0.81	4	مرتفع
14	تبين الرياضة للطلاب أن الانتماء للوطن يفرض عليهم العمل على تطويره والحفاظ عليه	0.61	8	متوسط
15	تسعى الرياضة إلى غرس حب الوطن في نفوس الطلبة	0.86	3	مرتفع
16	تظهر ممارسة النشاطات الرياضية الاعتزاز بثوابت الأمة	0.81	4	مرتفع
17	تبرز الرياضة أهمية الوطن من خلال الأنشطة الرياضية	0.91	2	مرتفع
18	تنشر الرياضة ثقافة الدفاع عن الوطن	0.78	6	مرتفع
19	تعزز الرياضة اعتزاز الطالب بهويته الوطنية	0.77	7	مرتفع
المجموع		0.79		مرتفع

جدول رقم (03) يرصد نتائج الفرضية الإيجابية الثانية.

التعليق والمناقشة

من خلال النتائج المبينة في الجدول أعلاه يتبين لنا أن الرياضة تلعب دورا محوريا في عملية تنمية قيمة الانتماء الوطني لدى الطالب الجامعي بمتوسط بلغ 0.79، فالرياضة حسب عينة الدراسة تسعى إلى نشر ثقافة المواطنة في أوساط الطلبة بمتوسط بلغ 0.97 وترتيب أول، ذلك أن الرياضة تهدف أساسا إلى غرس روح الوطنية في الطلبة، كما أن الرياضة تحاول أن تبرز أهمية الوطن والوطنية من خلال الأنشطة الرياضية المختلفة التي تحاول تقريب وجهات النظر بين الطلبة بمتوسط بلغ 0.91، كما تسعى الرياضة من خلال الأهداف والأدوار والنشاطات التي تقوم بها إلى غرس حب الوطن في نفوس الطلبة وهو ما يمكن ملاحظته من خلال مختلف تلك النشاطات وذلك بمتوسط بلغ 0.86، ومن بين ما تحاول الرياضة إبرازه هو الاعتزاز بثوابت الأمة بمتوسط بلغ 0.8 حسب عينة الدراسة، فالمتتبع لمختلف الأنشطة الرياضية يلاحظ ذلك الهدف المنشود من الرياضة بشأن تعزيز الهوية الوطنية لدى الطلبة، كما أكدت عينة الدراسة بمتوسط بلغ 0.81 أن الرياضة تعزز شعور الطلبة بالانتماء للوطن، فالعمل وفق فريق يجعل الطالب متحمس للعمل الجماعي من جهة ولحب الانتماء لهذا الفريق من جهة أخرى وهو ما يعزز سلوك الانتماء للوطن، كما أن الرياضة تسعى إلى نشر ثقافة الدفاع عن الوطن بمتوسط بلغ 0.78، وهو ما يمكن ملاحظته على سلوكيات الطلبة الذي يمارس الرياضة أو يتبعها من دفاع مستميت على الوطن، كما أن الرياضة من جانب آخر تعزز لدى الطالب إعتزازه بهويته من خلال مشاركة ذلك مع أقرانه وجماعته بمتوسط بلغ 0.77، ولعل ما يمكن ملاحظته أيضا أن الرياضة تلعب دورا متوسطا بخصوص كل من جعل الطالب مضطلع بإحترام العادات والتقاليد بمتوسط 0.60، وكذا تبيان أهمية العمل على تطوير الوطن من خلال الرياضة، فالرياضة تعزز عملية الانتماء الوطني من خلال كونها "تنطوي على أدوار ومهام ووظائف تربوية تجعلها في مجملها وسيطا تربويا هاما، فمن خلالها تتم التنشئة الاجتماعية السليمة للنشء

والشباب ليكون مواطن صالح، وتسهم في تشكيل مواقفهم الفكرية لإعدادهم فكريا وسلوكيا وبدنيا، وتكسبهم المثل العليا للرياضة، فهي تنظم السلوكيات الفردية والجماعية وتعمل على غرس المعتقدات والمفاهيم الاجتماعية وقيم الولاء والانتماء والمواطنة التي من شأنها أن تسهم في عملية التنشئة الوطنية للأفراد، فالإطار الاجتماعي للرياضة هو القادر على أن يقابل بين الرياضة كقيم وخصال إجتماعية وبين اتجاهات المجتمع وأمانيه وتوقعاته" (حنان أحمد مراد، هدى حسني الشايب، 2021، ص196)، ولعل النتائج المتوصل إليها تؤكد لنا أن الرياضة تلعب أدوارا مختلفة بخصوص تنمية قيمة الانتماء الوطني لدى الطالب الجامعي.

عرض نتائج الفرضية الإجرائية الثالثة: هناك دور تلعبه الرياضة في تنمية قيمة تقبل الاختلاف لدى الطالب الجامعي.

الرقم	العبارات	المتوسط الحسابي	الترتيب	التقدير
20	ممارسة الرياضة تجعلني أحارب التعصب والعنف داخل المجتمع	0.98	1	مرتفع
21	ترسخ لدي أبجديات النقد الذاتي وتقبل النقد البناء الموضوعي من خلال ممارستي للرياضة	0.89	9	متوسط
22	تتيح لي ممارسة الرياضة الحرية لإبداء وجهات نظري وآرائي	0.92	6	مرتفع
23	تنمي الرياضة الشعور بالعدالة لدي بين جميع أفراد المجتمع	0.90	8	مرتفع
24	تجعلني الرياضة أدافع عن الحرية في إبداء الرأي	0.84	12	مرتفع
25	تنمي لدي الرياضة مبدأ حرية التعبير	0.85	11	مرتفع
26	ترسخ الرياضة لدي مبدأ حرية التفكير	0.83	13	مرتفع
27	حينما أمارس الرياضة أستخدم الحوار الإيجابي بدلا من الحوار السلبي	0.98	1	مرتفع
28	ممارسة الرياضة تجعلني أشعر بثقافة التسامح بين المواطنين	0.97	3	مرتفع
29	ممارسة الرياضة تجعلني أتعامل بموضوعية مع الآخرين	0.95	5	مرتفع
30	تنمي الرياضة لدي قيم التعددية في الآراء والأفكار	0.91	7	مرتفع
31	توفر الرياضة لدي الفضاء لمناقشة مختلف القضايا بكل حرية	0.87	10	مرتفع
32	يمكن نشر روح المحبة والسلام من خلال ممارسة الرياضة	0.96	4	مرتفع
	المجموع	0.91		مرتفع

جدول رقم (04) يرصد نتائج الفرضية الإجرائية الثالثة.

التعليق والمناقشة

من خلال النتائج المبينة في الجدول أعلاه نلاحظ أن الرياضة تلعب دورا في مجال تنمية قيمة تقبل الاختلاف لدى الطالب الجامعي وذلك بدرجة مرتفعة أين بلغ المتوسط الحسابي 0.91، فممارسة الرياضة تعزز مسألة محاربة التعصب والعنف داخل المجتمع حسب عينة الدراسة بمتوسط بلغ 0.98 وبترتيب أول، أي أن الرياضة تشجع الطالب الجامعي على محاربة العنف والتعصب خاصة وأن النشاط الرياضي هو في الواقع عبارة عن تفرغ طاقة معينة لدى الطلبة أين أصبحت كتنفس وفضاء للتفرغ النفسي من قبل الطالب وهو ما يقيه من عملية ممارسة العنف أو التعصب مما يجعله يتقبل الآخر، كما أن

ممارسة الرياضة تجعل الطالب يتبنى الحوار الإيجابي بدلا من الحوار السلبي وذلك بمتوسط بلغ 0.98، فالرياضة تعد دعامة أساسية لتعزيز الطلبة على الحوار الإيجابي وإلى نبذ الاختلاف وتقبله إنطلاقا من الحوار بين الطلبة فهي تعلمهم تقبل الحوار وتبنيه كأسلوب حضاري لا بد منه، إضافة إلى أن الرياضة تشجع الطلبة أيضا على تبني ثقافة التسامح بين المواطنين وتحاول أن ترسخ تقاليد التسامح من خلال جعل الرياضة تتبنى ذلك المفهوم، بمتوسط بلغ 0.97، وهو ما يؤكد أهمية الرياضة في غرس الكثير من القيم التي يعد التسامح أحد أوجهها، كما أن الرياضة تعمل على نشر روح المحبة والسلام حسب عينة الدراسة بمتوسط حسابي 0.96 أي أن الرياضة من خلال ما تقوم به تغرس الكثير من قيم المحبة بين المواطنين وكذا ثقافة السلام التي تعد أسس لترسيخ قيمة تقبل الاختلاف وهي سمة يمكن غرسها من خلال الأنشطة الرياضية، ولعل ممارسة الرياضة أيضا تجعل الطالب يتعامل بموضوعية بمتوسط بلغ 0.95 كون الرياضة تجعل الطالب يتقبل الكثير من القوانين الخاصة بها وهو ما يجعل ينسى الكثير من ذاتية في ظل قوانين الرياضة ما يشجعه على تبني الموضوعية أين يكون موضوعيا في طرحه، كما أن الرياضة حسب عينة الدراسة بمتوسط بلغ 0.92 تتيح للطلاب الجامعي الحرية لإبداء وجهات نظره بدون أي مشكل، فالرياضة كفضاء للممارسة حر، يعلم الطلبة الحرية في إبداء وجهات النظر المتعلقة بممارساتهم وفق القوانين المعمول بها في هذا الإطار، وعليه يمكن تنمية قيمة التعدد في الآراء وإحترام آراء الآخرين وهذا ما أكدته عينة الدراسة بمتوسط بلغ 0.91 خاصة وأن الطالب يتعلم إحترام رأي وأفكار المنافسين، ولأن قوانين الرياضة واحدة وتطبق على الجميع فإنها تشعر الطلبة بنوع من العدالة بين جميع أفرادها وهو ما ينمي لديهم الشعور بالعدالة بمتوسط بلغ 0.90، ولعل ميزة الرياضة والتي تنبع من خصوصياتها أنها ترسخ لدى الطلبة أبجديات النقد الذاتي وتقبل النقد البناء خاصة وأنها تعد ممارسة تكتسب عن طريق التعلم وهذا ما أشارت له عينة الدراسة (متوسط 0.89)، كما أن خصوصية الرياضة أنها توفر للطلبة فضاء لتبادل الأفكار والآراء بكل حرية بدون أي رقيب عليها أين يمكن للطلبة أن يناقشوا مختلف القضايا في إطار الرياضة والتي تهمهم بدون أي إشكال يطرح (وهو ما أكدته عينة الدراسة 0.87 متوسط حسابي)، ومن بين المبادئ التي تعمل الرياضة على تنميتها حسب عينة الدراسة مبدأ حرية التعبير، ومبدأ حرية التفكير، وكذا إبداء الرأي بكل حرية، وهو ما يؤكد لنا أهمية الرياضة في ترسيخ قيم الحرية التي تعد مدعاة لتقبل الاختلاف من قبل الطالب الجامعي، لذا نستطيع القول أن الرياضة تلعب العديد من الأدوار في محاولة منها لترسيخ وتنمية قيمة تقبل الاختلاف.

عرض نتائج الفرضية الإجمالية الرابعة: هناك دور تلعبه الرياضة في تنمية قيمة المسؤولية لدى الطالب الجامعي.

الرقم	العبارات	المتوسط الحسابي	الترتيب	التقدير
33	أحث المواطنين على الحفاظ على الممتلكات العامة والخاصة من خلال الرياضة	0.57	8	متوسط
34	أحاول تنمية قيم التكافل بين الطلبة من خلال رسالة الرياضة	0.89	5	مرتفع
35	ترسخ الرياضة قيم التعاون بين المواطنين	0.95	1	مرتفع
36	تحت الرياضة الطلبة على إحترام الوقت وإدارته بفعالية	0.90	4	مرتفع

مرتفع	7	0.72	تبين الرياضة أهمية الإلتزام بمختلف القوانين في المجتمع	37
مرتفع	3	0.91	تشجع الرياضة الطلبة على تحمل المسؤوليات المختلفة	38
مرتفع	2	0.92	تبين الرياضة أهمية إنجاز العمل بالدقة المطلوبة	39
مرتفع		0.73	المجموع	

جدول رقم (05) يرصد نتائج الفرضية الإجرائية الرابعة.

التعليق والمناقشة

من خلال النتائج المتوصل إليها والمبينة أعلاه نلاحظ أن الرياضة تلعب دورا في تنمية قيمة المسؤولية لدى الطالب الجامعي وذلك بمتوسط بلغ 0.73، فالرياضة تعمل على ترسيخ قيم التعاون بين المواطنين (متوسط حسابي بلغ 0.95) أي أن الرياضة من خلال الممارسة تنمي لدى القائم بها شعورا بالتعاون خاصة الرياضات الجماعية التي تعمل على تنمية روح الجماعة التي يعد التعاون أساسها، كما أنها تعمل على ترسيخ أهمية إنجاز العمل المطلوب بالدقة المطلوبة وهو مبدأ إتقان العمل الذي يدخل في صميم المسؤولية التي على الطلبة تحملها إنطلاقا مما يقوم به (بمتوسط بلغ 0.92)، ولعل أهم ما تقوم به الرياضة هو تشجيعها للطلبة على تحمل المسؤوليات المختلفة (متوسط حسابي 0.91) وهذا ما يمكن ملاحظته فالأفراد الذين يمارسون الرياضة يكونون أكثر تحملا للمسؤولية ممن لا يمارسونها إنطلاقا من الروح الرياضية التي يتحلون بها من جهة، وكذا من خلال الإحتكاك مع الآخرين ما يجعلهم يكتسبون سمات القائد وخصائه وهو ما يشجعهم لتبني سلوك تحمل المسؤولية مقارنة بأقرانهم، ومن بين الممارسات التي يكتسبها الطلبة من الرياضة هي إحترام الوقت وإدارته بفعالية بمتوسط بلغ 0.90 ذلك أن الرياضة ترتبط إرتباطا وثيقا بعامل الوقت من حيث إستغلاله الإستغلال الأمثل وإحترامه لأن أي خلل في عدم إحترام الوقت ينعكس سلبا على ممارسها من حيث تضییع الوقت وهو أمر غير مقبول بتاتا في مجال الرياضة، كما أن الرياضة تعمل على تنمية قيم التكافل بين الطلبة من خلال الرسالة التي تتبناها الرياضة بمتوسط بلغ 0.89 أين نلاحظ أن الكثير من النشاطات الرياضية التي تقام يكون أساسها التكافل الاجتماعي مع حالات معينة، إضافة لكون الرياضة تبين أهمية الإلتزام بمختلف القوانين في المجتمع بمتوسط بلغ 0.72، كما أنها تعمل على حث المواطنين على الحفاظ على الممتلكات العامة والخاصة لكن بشكل متوسط بلغ 0.57، ولعل ذلك يعود لنظرة الطلبة للممتلكات العامة والخاصة، وما يمكن تأكيده أن الرياضة تلعب دورا أساسيا في عملية تنمية قيمة تحمل المسؤولية التي تسعى لغرسها لدى الطلبة من خلال توعيته ومحاولة التأثير فيه من خلالها.

اقتراحات وتوصيات الدراسة

- القيام بمزيد من الدراسات المماثلة حول أهمية الرياضة ودورها في ترسيخ قيم المواطنة لدى الطلبة الجامعيين.
- توعية الطلبة بأهمية ممارسة الرياضة ونشر الوعي الوطني من خلالها.
- إجراء دراسات مقارنة حول قيم المواطنة لدى الطلبة الممارسين للرياضة والطلبة الغير ممارسين للرياضة.
- تشجيع القائمين على الرياضة بتعزيز المواطنة وقيمها من خلال السهر على تضمين الأنشطة الرياضية ملامح الوطنية.

خاتمة

ما يمكن تأكيده في هذا المقام أن الرياضة كنشاط أو ممارسة تلعب دورها مهما على الكثير من الأصعدة والمستويات بالنسبة للأفراد، أين يمكن ترقية القيم الوطنية وتنميتها وتعزيزها من خلال الرياضة وهو أمر جد ممكن ما إن توافرت الإرادة الكاملة للقيام بذلك.

إن الرياضة اليوم لم تعد مجرد نشاط جسدي وفقط بل أضحت نشاطا ترفيهيا وتربويا يمكن من خلال غرس الكثير من القيم على مستوى الأفراد، فقد تغيرت النظرة للرياضة في العصر الحديث، وأضحت الكثير من الدول والمنظمات تعول عليها كل في مجالها من أجل نشر الوعي وترسيخ القيم خاصة قيم المواطنة التي تعد مسألة جوهرية في ظل بروز الكثير من الأزمات حول مستوى الهوية الوطنية.

إن جعل الرياضة تقوم بدورها في مجال ترقية وتنمية قيم المواطنة يحتاج في التحقيق إلى تظافر الكثير من الجهود وتسطير الكثير من البرامج حفاظا على شبابنا في ظل ما يميز العالم اليوم من تغيرات تطرأ كل يوم، وهو ما يجعلنا أمام خيار واحد وهو المضي قدما بالرياضة نحو الأهداف التربوية التي تسعى لتحقيقها يجعلها وسيلة في يدنا للأخذ بطلبتنا نحو المواطنة بكل أشكالها.

بيان الإفصاح

لم يُبلِّغ المؤلفون عن أي تضاربٍ محتملٍ في المصالح.

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The Impact of Inclusive Pedagogy on Problem-Solving


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Abstract

The pedagogy of integration is a method of preparing lessons based on the analysis of meaningful integration situations, which works to create a competent learner capable of adapting to his society and facing all the obstacles that confront him. The integration process is not conducted within separate resources but rather within integrated situations, through which the learner utilizes appropriate knowledge, skills, and behaviors to find solutions to the situation. In this way, it intersects with the goals of the school and the tasks it undertakes. This involves equipping students with relevant, structured, and lasting skills that can be applied in real-life communication and problem-solving situations, enabling them to learn throughout their lives, contribute effectively to society, and adapt to change.

Keywords: Learner, Integration Pedagogy, Integration, Problem Situation, Problem-Solving

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Introduction

Integration is a process aimed at enabling the learner to give meaning to their previously isolated learning by linking it in a meaningful, integrative way. Hence, it has become essential to focus on what the learner should produce after a series of lessons or after completing one or more learning units. This production should then be practical, especially if applied to daily life, both now and in the future. Only then does learning become meaningful and beneficial, because the important thing is for the learner to be able to utilize their acquired knowledge to accomplish complex tasks and to recognize the usefulness of what they learn in school. This approach will allow us to move beyond the traditional view that sees the learner as a blank slate upon which the teacher writes whatever they wish, by simply imparting a set of knowledge that they memorize and recall when asked. This leaves the learner isolated, confined to their school, unable to venture beyond its walls, and disconnected from the world around them. Through his surroundings and his daily life.

1. The concept of integration pedagogy:

It forms the methodological framework for activating the competency-based approach. It seeks to make the learner establish relationships between learnings acquired in a fragmented manner, and coordinate them to use them in meaningful situations. Thus, the integration process is not within separate resources but within integrative situations, through which the learner invests what is appropriate from knowledge, skills, and behaviors in order to find solutions to the situation.

The pedagogy of integration into knowledge, from its utilitarian aspect, is influenced in this by the utilitarian doctrine introduced by the educator John Dewey. 'Dewey views education as life itself, not merely preparation for life, and considers the educational process primarily a social one. He believes the role of the school is to change society, since students represent the society of tomorrow. This is why he rebels against old curricula, deeming them arbitrary, as they do not consider knowledge from a practical standpoint, but rather focus on the quantity of information the learner must memorize, and concentrate on achieving goals imposed on the learner that are far removed from their interests. For Dewey, education is a process of developing the learner's abilities. (al-Alawi).

Therefore, knowledge should be used as a tool for learners to confront situations and solve problems, not merely for memorization. What is acquired in school should play a role in life through solving various problems.

The foundations of learning in the pedagogy of integration also stem from the constructivist theory of psychology developed by Jean Piaget (1896-1980), a Swiss educator and psychologist who specialized in researching the origin of knowledge and the mechanism of learning. He succeeded in constructing a theory of knowledge known as cognitive or constructivist theory, which posits that knowledge is constructed, not

transmitted. Learners build it independently and gradually through their interaction with their society. It is a social negotiation process that requires a degree of control. (Theoret)

We also refer here to the socio-structural influence of Vygotsky. Vygotsky (1896-1934) was a Russian researcher who was able to build a theory based on the principles of developmental psychology, especially on the principle of interaction between the child and his surroundings. If Piaget focuses on the learner and his abilities in his interaction with the environment, then Vygotsky focuses his attention on the social component and its role in stimulating the learner's abilities. The situation that the learner accomplishes is under the guidance of the teacher, who is the one who unleashes his latent energies.

2. Fundamental Concepts in Integration Pedagogy

Integration pedagogy is based on several concepts, including:

a- Resources: These are the sum of knowledge that the learner mobilizes to solve a complex situation. Resources are classified into:

- Knowledge (les savoirs): Example: the subject and predicate, the five nouns, the imperative sentence, etc.

- Practical Knowledge (les savoirs-faire): Example: writing a letter, performing a song, expressive reading, etc.

- Behavioral Knowledge (Attitudes and Values): Example: Engaging in dialogue with others, visiting a sick person, helping someone in need, etc.

b- Competency

The novelty introduced by the competency-based approach lies in integrating learning within specific situations. Competency is the mobilization of resources, and this mobilization is what is termed integration.

The goal of learning is not merely to obtain a certificate, but to achieve competency, which Rogers defined as "the mobilization of an integrated set of knowledge, practical knowledge, and behavioral knowledge in an internalized manner in order to solve problem situations." (Roegiers)

Therefore, the competency-based approach can be considered an integrative pedagogy, since competency requires a process of recruitment and integration, for the purpose of utilizing it in meaningful situations. (Haji) Integration occurs in several areas, as previously mentioned. For example, when a merchant weighs and measures and skillfully uses addition and subtraction, we say he is competent. Similarly, a tailor is competent when he sews a garment, and a doctor is competent when he treats his patients, and so on.

What we can conclude is that competence is achieved through transforming learners' acquired knowledge into genuine skills. The relationship between competence and integration is strong, as "competence is achieved after the integration of acquired knowledge." (Bishou)

The problem situation: "It is a set of information, presented in a specific context (school, economic, social, cultural...) for the learner to use in an integrated way in order to accomplish a task." (Ali)

Therefore, a problem situation is a comprehensive, complex, and meaningful learning situation, usually proposed at the end of the learning process.

Problem situations are classified into:

- 1- Learning problem situation: Its purpose is to establish resources.
- 2- Integration problem situation: This is prepared for assessment, and its purpose is to ensure the development of the final competency or to practice integration at the end of the week.

C.1- Problem-solving skill: This is considered one of the essential skills that an individual needs in various areas of life. By mobilizing resources and prior knowledge, and following a structured and clear approach, dealing with any problem situation becomes easier and more effective. The integrative situation is among the activities through which prior knowledge is integrated, and because this situation is usually subject to testing the learner's competence, it is called the evaluative situation. "It is an evaluative problem situation, in which the learner proves, when solving it, the extent of the observed competence's growth, through the quality of the product presented and the level of success in recruiting the acquired resources in an integrated manner within the product itself." (Ali)

The integration situation, according to Xavier Roegiers, is formulated based on three components. (Roegiers, previous reference, p. 76 and beyond. See also: Al-Taher and Ali, The Integrative Position..)

Context: This describes the environment in which the situation takes place (social, economic, cultural context, etc.) and should be based on the learner's reality.

Supply Materials: These are the resources provided to the learner to accomplish the task. They may include texts, proverbs, sayings, images, maps, tables, audio recordings, etc., which facilitate the learner's task.

Instructions: These are explicit questions beginning with a command, directed to the learner to complete the task.

The situation must be formulated correctly, and we will present here the most important conditions for its formulation: (Roegiers, previous reference, p. 76 and beyond. See also: Al-Taher and Ali, The Integrative Position..)

- It should be appropriate to the competency being assessed (meaning it should align with the competency being studied, such as narration, description, or argumentation, and not be arbitrarily suggested).
- The learner should encounter a problem that needs to be solved.
- It should be complex, meaning it requires the mobilization of a range of knowledge, including practical and behavioral knowledge.

- It should be new to the learner, so it is not merely a reproduction of a previously solved situation.

- It should be purposeful, meaning it contains values that it seeks to develop and encourage.

- It should be relevant and connected to reality, and not simply a school scenario.

- It should challenge the learner's thinking by introducing confusing information that disrupts their thinking and stimulates their latent potential. □ To restrict the learner with a direct question, so as not to allow them to produce freely and randomly.

To be evaluable, aiming to assess competence based on the learner's output, and then to establish criteria for evaluation.

3. Benefits of Integration Activities

From what has been mentioned about integration activities, we can conclude their importance: they are personal, self-directed activities that give the learner an active role in the teaching-learning process. In integration activities, the learner continues to recall what they have learned in school and works to apply it to their lived reality.

Although the integration of acquired knowledge is a personal process, it only occurs after acquiring different learnings (knowledge, skills, and attitudes...). These constitute the foundation and starting point for the learner, because he will inevitably begin to search within his prior acquired knowledge. He cannot start from nothing, but through it he will reach a solution to his situation. "The adoption of the method of integrating acquired knowledge should not make us forget that the student needs to accomplish a set of ordinary learnings step by step, and therefore he should be provided with what is necessary in order to be able to achieve these learnings." (Bishou)

Integration is a beneficial activity that works to link life with the school, and this is only achieved by giving importance to situations that aim to develop competence. These situations should be meaningful, arousing the learner's interest and making him feel that what the school offers him is in line with his interests, problems, and everything he is exposed to outside this narrow space represented by the school. If the learner loses this feeling, a gap occurs and the chasm widens between him and his school. Perhaps this is what makes him bored and averse to it, because he does not gain any benefit from his learning, as he sees that the theoretical aspect that the school provides him has no equivalent in reality, so he loses his confidence in the latter to turn to what satisfies his curiosity and develops his knowledge outside of it.

In this activity, the student will also learn how to recruit, select, and coordinate a range of resources, depending on the situation. (Jonnyère) Because if he does not learn to integrate his resources and acquisitions, his learning will be limited to memorizing knowledge or completing school exercises, and he will not be able to face new situations in his life, and thus the goal of learning, which is to form a good, competent, and independent citizen, will not be achieved... Perhaps we can find many points of intersection between learning and integration, as both seek to make learners able to act in

their environment, and both aim to narrow the gap between what the learner receives in school and what he finds in society, and both aim to teach learners how to express their opinions and produce texts related to their daily lives, because "it is a big problem that huge sums of money are spent on raising children, but upon graduation a large number of them cannot use what they learned in their daily lives." (Ministry of National Education)

4. Integration Patterns

There are two integration patterns: (Ali)

-Vertical integration: This involves the learner initially acquiring a set of foundational competencies in a single subject. These competencies will be practiced throughout the program in various situations, depending on the nature of the tasks required. It is a simpler form of integration because it utilizes only one subject. For example, producing a text in a language activity or solving a problem in mathematics, etc.

-Horizontal integration: This type of integration gradually complements vertical integration. It is more complex because it requires the learner to master several competencies from different subjects. This is what we call a cross-cutting competency, such as citing verses from the Holy Quran and Prophetic Hadiths (Islamic Education) to express the importance of solidarity and cooperation in building society (Arabic Language).

5. Types of Integration Activities

Integration activities vary according to the subjects, grade levels, and competencies to be developed. "An integration activity is not based on solving a specific problem, but rather aims to develop a competency, which is formed and developed through a series of activities." Among the most important integration activities are the following: (Boutklai)

-Problem-solving activities: Problem-solving activities can be structured either to explore or to consolidate prior learning. In their exploratory function, they organize previous knowledge, while in their concluding function, the learner must solve the problem by drawing upon their existing knowledge and selecting the elements that will lead to the solution.

-Written or oral expression: This is an integrative activity specific to language learning. It can take various forms, but it must be functional. Examples include describing a person or scene, drafting an invitation to a party, writing the beginning or ending of a story, etc.

-Social Tasks: The task to be completed should serve a social purpose, meaning it should connect the learner's experiences with what they are learning. For example: writing an article for publication that draws public attention to the implementation of the death penalty for child abductors.

- Production on a Suggested Topic: Here, the learner is required to produce a complex personal work that utilizes a range of their acquired knowledge, which they will specifically address. This work may take several forms. In primary school, it may be an

essay; in secondary school, it may be a research project; and in higher education, it may be a thesis or dissertation. This work could also lead to the creation of an exhibition, the publication of a brochure, a magazine, etc.

- Field Visits: A field visit is considered an integration activity if it leads the learner to solve a problem by formulating a hypothesis and searching for information that allows them to prove or disprove the hypothesis. Alternatively, at the end of the visit, the learner must process and analyze the data they collected and draw conclusions from it. In such cases, the field visit can be described as an integration activity. □ Practical work in the laboratory: Practical work, such as field visits, is only considered an integration activity if it engages the learner and encourages them to use the scientific method (formulating hypotheses, collecting information, conducting experiments, observing results, etc.).

- Artistic innovations: Innovation is the very essence of an integration activity, as it involves the learner utilizing all their acquired knowledge. This refers to literary or artistic production (such as writing poetry and stories, drawing, music, etc.).

- Field training: This is a type of integration activity provided that the learner is given the opportunity to connect theoretical and practical knowledge, that is, to link what they practice during the training with what they have learned previously. □ The pedagogical project: Pedagogical projects represent real integration activities, provided that the students are active, by harnessing their acquired knowledge in accordance with specific objectives.

For example: preparing a project to decorate the school's surroundings with plants and trees... The importance of the project in pedagogical practice lies in making learners responsible for their learning and placing them in a continuous development process, as well as giving meaning to the activities proposed to them, meaning that they will realize why they are learning what they are learning.

6. Objectives of Integration Pedagogy

Rogers believes that this approach aims for three main objectives: (Hassan)

- Focusing on the final competency that the learner will achieve after a specific period, rather than solely on the stated learning objectives that the teacher strives to convey.
- Giving meaning to learning, ensuring that the learner does not perceive what they receive in school as merely theoretical knowledge, but rather finds resonance in their daily life.
- The importance of demonstrating learners' acquired knowledge through relevant situations that enable them to apply their prior knowledge and newly acquired skills.

7. The Role of Integration in the Competency-Based Approach

Under previous approaches, the Algerian school system was not fulfilling its mission effectively because much of its content was irrelevant to the learner's reality. The focus was on quantity rather than quality of performance. Therefore, it became necessary for specialists to reconsider the educational system and its foundations, leading to the development of a new vision called the competency-based approach. This approach was

built on principles that sought to connect the school with its surrounding environment, redistribute roles between teacher and learner, and restore the learner's standing.

The competency-based approach was founded on the ruins of the objectives-based approach, which fragments the educational process. The competency-based approach came to integrate everything that is separate thanks to integration. It is “a method for preparing lessons and curricula based on the analysis of learning situations that seek to develop the learner's abilities and skills in order to integrate him into his environment, as well as identifying the required competencies and translating them into learning objectives and activities.” (Gharib)

This approach is based on a set of principles, the most important of which are: (Ali, , Competency-Based Pedagogy, Dar Al-Warsam, Algeria, 2nd edition, 2011.)

- The Principle of Construction: This refers to the learner's retrieval of prior knowledge and its connection to new learning.
- The Principle of Application: This means practicing competence, as competence is defined as the ability to act in situations where the learner is an active and engaged participant in their learning.
- The Principle of Integration: This is one of the important principles that distinguishes this approach from previous teaching approaches, as integration allows for the development of competence by linking the studied elements.
- The Principle of Correlation: This principle allows for the connection between teaching activities, learning activities, and assessment activities, all of which aim to develop competence.
- The Principle of Transfer: What is presented in school should not be limited to addressing problems within the school, because the effectiveness of the school is linked to the principle of the ability to utilize school knowledge to solve real-life problems in different situations. It has already been mentioned that competence is achieved after the integration of acquired knowledge. Therefore, the competency-based approach is based on the principle of integration, which aims to develop a competent learner who can integrate their acquired knowledge and effectively utilize it in their life. For this reason, integration pedagogy is considered the practical framework for implementing the competency-based approach. Its goal is to develop the learner's competence by linking previously acquired knowledge in separate instances to solve a complex situation.

Thus, the principle of integration forms the heart of competency-based pedagogy, which is characterized by its focus on the learner and its position as the center of the teaching-learning process. This approach enables the learner to utilize and apply their prior knowledge by integrating a range of knowledge, skills, and behaviors into meaningful situations.

8. The Role of Assessment in Integration Pedagogy

In integration pedagogy, the teacher should start with the learner (the focus of the teaching-learning process), linking their prior knowledge with new information.

Knowledge is a unified whole; learners cannot grasp information in isolation from what they have already acquired. The teacher should focus on learning that is meaningful to the learner, such as presenting situations and problems that the learner can later apply in their life. Here, the teacher's role becomes clear: to propose situations, provide guidance and direction, and help learners overcome obstacles, thus empowering the learner to play a central role in constructing their own learning.

In the objectives-based approach, the teacher is the source and transmitter of information, while the learner remains merely a passive recipient. Ultimately, the learner is expected to regurgitate the information without critique, commentary, or innovation, as if it were divinely revealed scripture. This is perhaps why the objectives-based approach is based on behavioral theory; the learner receives information unconsciously and without creativity—a conditioned response (stimulus/response)—and is evaluated based on their ability to memorize and recall knowledge, not on how they apply this information in new, integrative situations.

As for the assessment in the pedagogy of integration, it is not concerned with the efficiency of memorization as much as it is concerned with the efficiency of performance, and this is done by assessing the ability to integrate resources and employ them in each new problem situation that is significant for the learner. Such an activity that requires solving a problem is likely to develop the learner's mental skills, as it involves practicing higher-order thinking skills and all aspects of his personality, because the situation is a test that goes beyond the school environment to the learner's living environment - a test with dual benefit - and even the marking that used to reflect the results of term exams is now supported by the teacher's observations, daily quizzes, discussions, dialogues, and oral and written expressions... The teacher must take into account the individual differences that exist between his learners in achievement, as well as in terms of inclinations and motivation. Abilities, competencies, interests, etc., necessitate a diversity of pedagogical methods, teaching tools, and assessment techniques.

The teacher must also support learners facing difficulties, addressing their struggles regularly and effectively, valuing and reinforcing their successes, defending the learner's autonomy, and teaching them responsibility. Most importantly, the teacher must not deviate from the fundamental function of assessment, which is to adjust the course of the teaching and learning process, and must not reduce it to a supervisory or administrative function. (Al-Awar)

In the modern approach, assessment is linked to the objectives predetermined in the new curricula, which recommend the use of effective assessment methods that comprehensively encompass learners' knowledge, practical skills, and behavioral knowledge.

Furthermore, in the pedagogy of integration, assessment should accompany all stages of the learning process and its various learning phases. It contributes to facilitating the learner's acquisition of diverse resources and is a pedagogical procedure aimed at understanding the development of students' learning and supporting their learning.

The curriculum addresses assessment, which should go beyond simply evaluating learners' results through grades to identifying weaknesses and working to address them. It also distinguishes between three forms of assessment, based on the time frame in which they are conducted and their intended purpose:

Diagnostic assessment: Its characteristics include:

- It takes place at the beginning of a learning session to assess acquired knowledge and compare it with prior knowledge in the following session.
- It takes place at the end of a learning session to analyze and interpret the results in order to adjust and modify teaching and learning, and in this case, it is considered part of formative assessment.

Diagnostic assessment enables us to identify various deficiencies before embarking on the teaching-learning process, in order to determine the learner's prior knowledge and their readiness for the learning process.

Formative assessment: It is "the assessment that takes place during the learning process, measures the achievement of learners, and diagnoses learning difficulties in a timely manner before failure occurs." (education)

This type of assessment has received special attention from educators because it "seeks to help learners learn by facilitating the process of establishing resources and developing the targeted competency, which is achieved through the continuous verification of their acquired knowledge." (Al-Taher and Ali)

This type of assessment allows for the development of the learner throughout the academic year and the refinement of their learning through feedback. It considers mistakes as a learning process, encouraging learners to repeat attempts until they arrive at the correct answer without being graded. Learning in this type of assessment is continuous and built upon several lessons. This is perhaps what makes it the most important assessment in the pedagogy of integration; it is an assessment that must be integrated into the learning process because learners build their knowledge gradually, not cumulatively.

Summative assessment: This takes place at the end of an academic year or educational stage because it "provides an assessment of the development of the final competencies defined by the curriculum for the year or stage, and in addition to considering the results as an end in themselves,"¹ it enables the teacher to determine the extent to which the targeted competencies have been achieved.

However, assessment of all types remains of paramount importance in determining the progress of the teaching-learning process. For the teacher, on the one hand, it allows them to monitor adherence to the curriculum's objectives and their success in guiding students to achieve the targeted competencies. On the other hand, assessment provides the learner with indicators that enable them to understand their level of learning and how close or far they are from the desired goal. (Methodological Guide for Curriculum Development)

9. General Conclusion

In summary, the purpose of problem-solving is to develop and practice competence by teaching students how to integrate resources to accomplish a complex task. Problem-solving enables learners to demonstrate their ability to integrate and give meaning to their learning. Teaching students fragmented learning is ineffective unless they are encouraged to apply it within meaningful problem-solving situations. These situations allow us to answer the question: Is the learner able to effectively utilize their various acquired skills? Problem-solving also serves to assess the degree of competence development. A learner is considered competent to the extent that they can solve the problem-solving situations presented to them at school, as well as those they encounter in their environment that are related to prior learning.

Disclosure statement

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Cybercrimes and Mechanisms for Combating Them in Algerian Legislation

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Abstract

With the proliferation and increase in cybercrimes faced by internet users in professional and personal transactions, and the increasing reliance on electronic data, it is necessary to develop a cybersecurity system at several levels. This information component has led to a change in the frequency and nature of cybercrimes committed.

The world has recently witnessed profound transformations at all economic, social, and cultural levels, particularly technologically. Societies have transformed from consumer societies to industrial societies to cyber-based societies, thanks to the rapid, low-cost, highly accurate, and highly profitable digital services provided by modern technology. Despite the positives of this technology, it has also posed a concern for every society, with its recognition of a number of negatives, the most important of which is what is known as cybercrime.

Given the specificity of these crimes—they transcend geography and do not discriminate between one society and another—Algeria is also among the countries that have witnessed a significant increase in the rate of these crimes in recent years. This has prompted Algerian legislators to enact legislation to combat cybercrime.

Keywords: Technological Developments, Cybercrimes, Digital Societies, Algerian Legislation, Crime & Internet

Introduction

The world today is witnessing unprecedented development, especially in the technological field, which is closely associated with computing and computer systems. The world has increasingly become confined to a virtual space. This advancement has helped human beings by providing valuable services and ensuring greater comfort and convenience. People now manage their activities through electronic networks, particularly the Internet. However, despite its benefits, this development also brings negative aspects and risks that threaten individuals, companies, and even states, due to cybercriminal attacks on individuals' personal data, financial fraud targeting banking institutions, espionage, and cyberterrorism that has affected states in their public order and national security. Consequently, these states have become threatened in their very structure and existence.

Cybercrimes are among the most significant concerns that now trouble citizens in their personal lives and states in terms of sovereignty and security. This is because the enormous technological and digital progress—and its accompanying impacts at all levels—has greatly affected, or rather undermined, the security and stability of societies on the one hand, while the consequences of this technological revolution have come to infringe upon citizens' sanctity and privacy on the other.

In light of this new digital-technological challenge, states have sought to enact a set of legislation and to establish legal and institutional mechanisms to confront this type of crime, which has come to be referred to in academic literature as electronic crime or cybercrime.

Algeria is one of these states that has not been immune to the repercussions of this phenomenon. In recent times, crimes have spread that affect citizens' private lives and also threaten the country's security and stability, as well as other aspects of life—economically, politically, and culturally. They have even affected the social fabric in its structure and composition.

For this reason, the Algerian legislator has enacted several laws and regulations to combat cybercrimes. Among the most important is Law 09/04, which sets out the special rules for the prevention and suppression of offences related to information and communication technologies, along with other legislation aimed at limiting the spread of such crimes.

In light of the above, this paper seeks to raise the following central question: **To what extent are the mechanisms adopted by the Algerian legislator effective and efficient in combating cybercrimes?**

To address this issue, the paper will follow this plan:

- **Axis 1:** The concept of cybercrimes
- **Axis 2:** Mechanisms for combating cybercrime

Axis One: The Concept of Cybercrime

Cybercrime has become a concept that is increasingly discussed in academic studies due to its importance in limiting cyber intrusions and confronting electronic crimes through various substantive and procedural methods. As a result, this term has come into wide use around the world.

First: Definition of Cybercrime

The misuse of information and communication technologies by offenders is interchangeably referred to as Internet crime, computer misuse, computer-related crime, high-tech crime, and electronic crime. Electronic crime, as defined by the Association of Chief Police Officers, involves the use of a computer, the Internet, or technological networks to commit a crime or facilitate its commission. The Australian Institute of Criminology considers it a general designation for crimes committed through the use of electronic data storage or a communications device (Samir, 2017, p. 258).

Defining the meaning of Internet crimes is not an easy task, as it is a broad construct encompassing many types of emerging abuse and crime enabled by communication and information technologies. It includes harmful behaviors that occur in cyberspace, transcend geopolitical boundaries, and challenge law-enforcement investigative tactics and traditional methods (Badri, 2018, p. 134).

Cybercrimes pose a major challenge to the environment in which they are committed, as Internet offenders can operate from anywhere in the world and target large numbers of individuals or companies across international borders. The challenges increase due to the scope and scale of these crimes, the technical complexity of identifying perpetrators, and the need for international cooperation to bring them to justice. The Internet opens new opportunities for offenders based on the belief that law enforcement does not function in the online world (Ben Khalifa & Hafouza, 2017, p. 1).

Second: Characteristics of Cybercrimes

The nature of cybercrimes and their distinction from traditional crimes is linked to the environment in which the crime is committed, as well as the tool or means used by the offender to carry out the unlawful act. Such crimes require the offender to possess knowledge—or at least a minimum level of technical literacy. They remain a form of criminal behavior that arises either by committing an act criminalized by law or by refraining from an act mandated by law. The offender's will is directed toward the act despite the existence of a legal text that criminalizes the conduct (Anini Sadiq, n.d., p. 37).

The characteristics of these crimes can be summarized as follows:

- a) Crimes committed using a computer as a tool, with the Internet serving as the means (Hroual, p. 37).
- b) Crimes that are often not reported, especially when they involve institutions and commercial companies, to avoid reputational harm or loss of customer trust (Mohammed, 2015, p. 65).
- c) Crimes that are difficult to detect because they do not leave physical traces that can help solve the case; instead, they leave digital informational traces.
- d) Crimes that are ambiguous and difficult to prove due to the absence of visible evidence, and because most data consist of symbols that cannot be readily read.

- e) Transnational crimes that cause severe harm affecting multiple regions.
- f) Crimes that require offenders to have technical knowledge and advanced expertise in computing.
- g) Crimes that are generally non-violent, as perpetrators do not use physical force or bodily strength to commit them.

Third: Types of Cybercrimes

Despite the diversity of acts that threaten cybersecurity, and the variation in their objectives and the actors behind them, some can be listed as follows:

1. **Violations of the confidentiality of communications** affecting access to email systems, chat services, file transfers, and access to information without authorization—similar to wiretapping phone calls, reading private email, or entering a home to search it. In countries that uphold legal rules, such acts generally require prior authorization from competent authorities in accordance with legal procedures. These acts—whether committed by an individual or by a public authority—violate rights and are considered crimes against rights.
2. **Manipulating, distorting, or destroying information** contained in certain systems—whether through physical intrusion or by sending software or specialized viruses—constitutes an infringement of property and the right to use and dispose of it. Where there is intent to cause harm, as well as interference with the proper functioning of a private or commercial website, whether the intended harm occurs or not, traditional crimes carried out via the Internet such as theft, fraud, deception, grooming minors, facilitating and encouraging illicit activities, and infringement of intellectual property rights are all punishable under positive law and do not require prior authorization from competent authorities in countries that adhere to legal rules.
3. **Crimes falling within the framework of organized crime**, such as money laundering and terrorism, which threaten the security of individuals and states in both cyberspace and the traditional sphere alike (Al-Ashqar, 2019, p. 220).

Axis Two: Mechanisms for Combating Cybercrime

As a new step, the Algerian legislator enacted Law 09/04 on the prevention and suppression of offences related to information and communication technologies. However, the implementation of its provisions on the ground remains weak to this day, due to neglect of the technical aspects necessary for applying these provisions and for determining appropriate penalties against perpetrators. In many cases, sanctions are often limited to financial fines only (Atiya, p. 321).

First: Preventive Measures

The Algerian legislator adopted a set of preventive measures to مواجهة cybercrime:

1) Electronic surveillance

This measure is permitted in specific cases, as exhaustively listed in Article 4 of Law 09-04 (Law 09-04 on the special rules for the prevention and suppression of offences related to information and communication technologies, 2009). It is carried out pursuant to a written authorization issued by the competent judicial authorities, for the prevention

of terrorist acts, subversive acts, or crimes affecting state security; or when information is available indicating a likely attack on an information system in a manner that threatens public order, national defense, state institutions, or the national economy. It may also be used for the purposes of ongoing judicial investigations and inquiries when it is difficult to reach results without resorting to this measure. Electronic surveillance may further be used within the framework of executing mutual international legal assistance.

2) Cooperation with service providers to prevent cybercrimes

This is achieved by requiring service providers to assist the authorities responsible for judicial investigations by collecting and recording, in real time, data related to the content of communications and by placing such data at the disposal of the authorities. This data includes:

- Data that makes it possible to identify service users.
- Data related to the terminal equipment used for communication.
- The technical characteristics, as well as the date, time, and duration of each connection.
- Data related to supplementary services requested or used and their providers.
- Data that makes it possible to identify the recipient of a communication, as well as the addresses of websites accessed.

Service providers are required to retain this data—referred to as traffic data. The law also defines it in Article 1 as “any data related to communication by means of an information system that is generated by the latter as part of the communications chain, indicating the source of the communication, its destination, the route taken, and the time, date, size, duration of the communication, and the type of service” (see Article 11 of Law 09-04).

Second: Procedural Measures

Among the procedural measures adopted by the Algerian legislator are the following:

1) Search and seizure of information systems

For the purposes of protecting public order and meeting the requirements of ongoing judicial investigations and inquiries, a set of technical arrangements has been established to monitor electronic communications, collect and record their content in real time, and carry out search and seizure procedures within information systems (Meshoush, 2020, p. 15).

However, seizure procedures face several practical difficulties for technical reasons. This requires the authorities conducting the search to use appropriate techniques to prevent access to the data contained in the information system or to prevent copying of the data placed at the disposal of authorized users (Presidential Decree No. 20-183 on reorganizing the National Authority for the Prevention and Suppression of Offences Related to Information and Communication Technologies, 2020).

It is also worth noting that the law authorizes remote searches conducted swiftly on an information system or part of it, as well as the stored digital data within it. Remote searches may likewise be conducted on an information storage system. The competent authorities may requisition any person with technical expertise regarding the information

system under investigation, or the measures adopted to protect the data it contains, to assist them and provide any necessary information.

2) Extension of jurisdiction over these crimes

Jurisdiction is vested in Algerian courts to hear offences related to information and communication technologies committed outside the national territory when the crime is committed by a foreigner and targets Algerian state institutions, national defense, or the strategic interests of the national economy (Al-Ashqar, 2019, p. 240).

3) Exchange of mutual international legal assistance

The Algerian legislator allows for the exchange of mutual international legal assistance to collect evidence related to the crime in its electronic form. Requests for assistance aimed at exchanging information or adopting precautionary measures may be granted in accordance with international agreements and the principle of reciprocity (Meshoush, 2020, p. 18).

4) The National Authority for the Prevention and Suppression of Offences Related to ICT

This authority was established under Law 09/04. Its composition, organization, and operating modalities were left to be determined by regulation, and several amendments followed—starting with a presidential decree in 2015, then in 2019, until the 2020 presidential decree reorganized the authority and defined it as “an independent administrative authority with legal personality and financial autonomy, under the authority of the President of the Republic, with its headquarters in Algiers” (Atiya, p. 330).

Its headquarters may be transferred to any other location within the national territory by presidential decree. The authority consists of a Steering Council and a Directorate-General, both placed under the direct authority of the President of the Republic, and it presents reports on its activities (Hroual, p. 40).

Based on the above, it can be observed that the Algerian legislator has taken a positive step by enacting and organizing this law; however, it is not sufficient on its own to address the seriousness of cybercrimes, which requires continuous adaptation to ongoing technological developments.

Conclusion

In light of what has been presented in this research paper, it has become an urgent necessity for both states and individuals to pay close attention to cybersecurity—especially as we live in the era of artificial intelligence. There is no alternative to cybersecurity in confronting cyber challenges and electronic crime. Algeria, through its criminal policy, has adopted a dual approach to addressing cybercrime, relying both on general traditional legal provisions and on special texts tailored to different fields. Despite the efforts made, Algeria still remains far from establishing a comprehensive criminal policy to confront this phenomenon. This is due to several obstacles that hinder the fight against cybercrime, particularly when newly introduced measures come into tension with the Code of Criminal Procedure and the requirement to respect human rights. Another challenge is Algeria’s non-accession to international conventions in this field, especially the 2001 Budapest Convention on Cybercrime.

Accordingly, the following recommendations can be proposed:

1. The Algerian legislator should address deficiencies in laws related to cybercrime and accelerate the enactment of legal provisions concerning electronic forgery, especially since the 2010 Arab Convention on Combating Information Technology Offences addressed this issue, and Algeria has ratified it.
2. Establish a legal committee to draft legislative texts that align with and respond to developments in cybercrime.
3. Encourage international action to strengthen global cooperation and mutual legal assistance in combating cybercrime, particularly with advanced countries that have expertise in this field.
4. Promote a cyber culture among members of society and economic and financial institutions, and encourage the proper use of information and communication technologies.
5. Call on universities and institutes to organize events and conferences to raise awareness of the importance of cybersecurity and to curb cybercrimes.

Disclosure statement

No potential conflict of interest was reported by the authors.

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Moroccan Cinema: The Poetics of Creativity and Artistic Dynamic


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Abstract

In this study, we examine and analyze the trajectory of Moroccan cinema, both in terms of its artistic progress and the aesthetic and intellectual diversity that characterized some of its films. We also offer an interpretation of these remarkable films and the artistic diversity they presented. Thus, we demonstrated the aesthetic creativity of these films by analyzing its most important components. We also addressed the major social themes they present, multiple and varied, such as the defense of women and the social rights of the poorest, and discussed issues that weaken the structure of society, such as rape and prostitution. We also conducted a detailed analysis of the types of characters present in these films, reflecting their diversity and richness. Finally, we demonstrated the creative dynamism this cinema has witnessed and the qualitative leap represented by women's cinema.

Keywords: Cinema, Society, Creativity, Woman, Aesthetics

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Le cinéma marocain : La poétique de la créativité et la dynamique artistique


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Résumé

Dans cette étude, nous examinons et analysons le parcours du cinéma marocain, tant au regard des progrès artistiques qu'il a connus qu'au regard de la diversité esthétique et intellectuelle qui a caractérisé certains de ses films. Nous proposons également une interprétation de ces films remarquables et de la diversité artistique qu'ils ont présentée. Ainsi, nous avons montré la créativité esthétique de ces films, en analysant ses composantes les plus importantes. Nous avons approché également les grands thèmes sociaux qu'ils présentent, multiples et variés, tels que la défense des femmes et les droits sociaux des plus démunis, et évoquons des problèmes qui fragilisent la structure de la société, tels que le viol et la prostitution. Nous avons procédé également à une analyse détaillée des types de personnages présents dans ces films, reflétant leur diversité et leur richesse. Et nous avons démontré enfin le dynamisme créatif dont ce cinéma a été témoin et le saut qualitatif qu'a représenté le cinéma féminin.

Mots clés: Cinéma, Société, Créativité, Femme, Esthétique

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En guise d'introduction

Le cinéma marocain se caractérise par une dynamique forte, se manifestant particulièrement dans la diversité des sujets abordés. Nous avons constaté qu'il a soulevé des questions telles que celles de l'enfance maltraitée et abandonnée, ainsi que des questions liées aux femmes, à la liberté et aux dimensions sociales qui en découlent. Il a également abordé le sujet de l'immigration clandestine et les raisons sous-jacentes, ainsi que d'autres sujets. À travers cela, il a réussi à être le reflet de la société dans toutes ses problématiques. Ainsi, le public le suit et soutient tous les films qui appartiennent à sa filmographie, qui connaît une croissance significative année après année. En plus de ces questions soulevées par le cinéma marocain, il a également connu sur le plan technique et dans le domaine de la réalisation une phase avancée, ce qui en fait l'un des cinémas arabes les plus actifs dans ce domaine créatif difficile. Cela se manifeste par les importantes récompenses remportées dans tous les festivals locaux, arabes et internationaux auxquels il participe.

Ainsi, pour penser le cinéma en général et le cinéma marocain en particulier dans toutes aspects, artistique, social et même politique, surtout au niveau de son influence psychique sur les gens et pour « saisir son fonctionnement, il faut excaver la circulation spécifique qui règle les conditions d'échange entre les trois appareils, cinématographique, psychique et social. Échanges qui sont rendus possibles par la congruence des forces produites par chacun des trois appareils mais aussi des unités de conversion qui traitent ces forces » (Eizykman, 1976, p. 9).

Cela nous amène à réfléchir avec un esprit scientifique et une méthode descriptive et analytique sur le parcours du cinéma marocain et sur ses films distingués.

1. Le cinéma marocain et la poétique de la créativité

Au-delà de cela, le cinéma marocain a réussi à réaliser une créativité poétique distincte, reflétée dans les films marocains qui ont tenté de combiner diverses formes artistiques, comme c'est le cas avec le film "La Symphonie marocaine", qui a entièrement adopté la musique comme structure narrative et en a fait la force motrice des événements de ce remarquable film cinématographique qui a remporté le grand prix au quatrième Festival du film francophone de Safi, face à un ensemble de quatre films francophones ou coproduits par des pays francophones. De même, le film "L'Enfant endormi" de la réalisatrice Yasmine Kassari, qui a déjà remporté le grand prix au Festival national du film de Tanger lors de sa huitième édition, s'est appuyé sur la spatialité du lieu et l'a transformé en protagoniste du film, faisant ainsi de la nature un précurseur des événements et les suggérant avant même qu'ils ne se produisent, en plus de sa force diagnostique présente, ce qui a également été le cas avec le film "Le Grand Voyage" du réalisateur Ismaël Ferroukhi. De même, les films de Hakim Belabbes, Daoud Oulad Sayed, Abdelilah El Jaouhari, Mohamed Mouftakir, Hicham Lasri, Mohamed Chrif Tribak et Saïd Khallaf pour n'en

citer que quelques-uns, ont montré une maîtrise remarquable des outils cinématographiques et une expression artistique claire et précise.

Ce qui est beau dans tout cela, c'est que le cinéma marocain, tout en parcourant cette trajectoire artistique avec force et stabilité, a été accompagné d'une critique cinématographique développée et puissante, exprimant toutes ses préoccupations et y participant également dans la réalisation de cette évolution, et l'a louée. Cette critique cinématographique a tenté de définir les fondements de cette évolution artistique du cinéma marocain et d'en montrer les perspectives, à travers le suivi médiatique de tous les films marocains projetés dans les salles de cinéma ou dans les festivals d'une part, et d'autre part en décernant des prix critiques aux films marocains exceptionnels dans le cadre des festivals de cinéma où ils sont présentés.

Le cinéma marocain a également connu un autre aspect de son évolution, en particulier dans le développement remarquable et frappant des courts-métrages marocains, qui ont réussi à réaliser une poétique artistique distinctive, dépassant souvent certains longs-métrages marocains, surtout parce qu'ils ont tendance à se concentrer davantage sur l'aspect esthétique que sur les sujets abordés. Cela les a transformés en films se penchant souvent vers un cinéma d'auteur. On peut citer à cet égard le film " Les Poissons du désert " du réalisateur Alaa Eddine Aljem, qui a déjà remporté le grand prix du Festival national du film de Tanger lors de sa seizième édition. C'est un film puissant qui possède une poétique distincte à la fois dans son sujet, qui traite de la relation entre le père et le fils d'une part, et de la relation entre le fils et la mère d'autre part, et dans son traitement artistique et sa présentation cinématographique experte.

Cependant, ce cinéma doit encore créer ses propres stars, car la création de stars, comme l'a souligné Edgar Morin dans son célèbre livre "Les Stars", est une question fondamentale, car ce sont ces stars qui font prospérer le cinéma et lui donnent un public large. Et grâce à ces stars, le cinéma, avec sa présence distinctive, acquiert une force et une portée considérables .

Edgar Morin dit à propos de ces stars et leur influence sur la réception des films ceci : « mm Les films gravitent autour d'un type solaire de vedettes justement nommé étoile ou star » (Morin, 2015).

De plus, ce cinéma doit diversifier les sujets qu'il aborde et se contenter de traiter un seul sujet dans chaque film au lieu d'en rassembler plusieurs, ce qui peut parfois obscurcir la clarté de la vision.

2. Le cinéma marocain et la dynamique artistique

À côté des réalisateurs marocains bien connus, le nombre de réalisatrices au Maroc ne cesse d'augmenter année après année, surtout que les réalisatrices marocaines en général ont réussi à se faire une place notable dans ce domaine artistique difficile, à travers les

films qu'elles ont présentés ou du moins ceux auxquels elles ont contribué, que ce soit en écrivant le scénario, en produisant ou en jouant dedans.

Dans ce domaine, un groupe de réalisatrices marocaines a émergé, chacune avec sa propre vision cinématographique et ses caractéristiques propres dans les films qu'elle a présentés, que ce soit en termes de représentation intellectuelle de l'image de la femme ou en termes de périodes temporelles que chacune d'elles cherche à présenter dans ses films, en fonction de sa référence générale.

Parmi les réalisatrices marocaines qui ont connu une grande notoriété dans le paysage cinématographique marocain, on trouve la grande réalisatrice Farida Benlyazid, qui a réalisé plusieurs films qui ont connu un succès remarquable et qui ont été au centre de débats et de discussions, que ce soit dans les journaux ou lors de rencontres et festivals de cinéma marocains et internationaux. Parmi ces films, son premier film célèbre, « Une porte sur le ciel » a été considéré comme un jalon dans sa carrière cinématographique et a été présenté comme un film puissant non seulement pour le cinéma marocain mais aussi pour le cinéma arabe, en particulier en ce qui concerne les questions liées aux femmes et à leur défense. Ce film raconte l'histoire de Nadia, une jeune marocaine émigrée qui revient de Paris pour rendre visite à son père mourant à Fès, où elle rencontre une autre femme d'une grande profondeur spirituelle, qui l'influence beaucoup, la poussant finalement à transformer la grande maison de son père, qu'il avait l'intention de vendre, en un refuge pour les femmes démunies. Son deuxième film, réalisé en 1999 et intitulé « Ruses de femmes » est inspiré d'un conte populaire qui met en scène la fille d'un commerçant, connue pour son intelligence et ses ruses, qui est fiancée au fils d'un sultan voisin, et a été interprété brillamment par l'actrice Samia Akariou et l'acteur marocain Rachid El Ouali. Bien que le film ait un caractère narratif populaire, il soutient la cause des femmes et offre une image positive des femmes marocaines depuis des temps immémoriaux. Après ce film, Farida Benlyazid a réalisé un autre film, "Casablanca, Casablanca" en 2002, qui s'inscrit dans la catégorie des films marocains qui se multiplient largement dans le cadre de l'encadrement de la ville de Casablanca, cette grande ville. Cependant, ce qui a dominé l'espace de ce film, c'est le conflit entre les personnages, et il ne s'est pas nécessairement concentré sur les questions des femmes, comme c'est le cas par exemple avec le film qui suivra, dans lequel la réalisatrice reviendra à la question des femmes, « Juanita de Tanger » qui a été adapté du roman « La Chienne de Vie de Juanita Narboni » de l'écrivain espagnol Ángel Vázquez . Le film défend également les droits des femmes et présente une image d'elles, mais cette fois-ci dans leur dimension mondiale, pas seulement marocaine ou arabe. Si Farida Benlyazid a contribué depuis ses débuts au cinéma à présenter une image de la femme dans ses diverses manifestations sociales, sa compagne de route dans le cinéma marocain, la réalisatrice marocaine Farida Bourquia , qui a réalisé auparavant le film "La Braise" en 1981 et qui était une pionnière dans la réalisation cinématographique féminine au Maroc, ainsi que dans la présentation de la question de la souffrance sociale des femmes vivant dans les villages de montagne, surtout après l'incarcération ou la mort

de leur soutien de famille, et leur désir de subvenir aux besoins de leurs enfants et de les protéger, a réalisé un nouveau film intitulé « Deux femmes sur la route », qui annonce dès son titre son parti pris en faveur des femmes et de leur défense dans le chemin qu'elles ont choisi ou qui leur a été imposé. Le film met en vedette les talentueuses actrices Mona Fettou et Aicha Mahmah. Il raconte l'histoire d'Amina, qui se rend dans le nord du Maroc où son mari est en prison pour trafic et vente de drogue, et en chemin, elle rencontre une vieille femme appelée Lalla Rahma, qui cherche également son fils désireux de faire une migration clandestine vers l'Europe. Le film présente deux images différentes de la femme, que ce soit au niveau social ou dans la vision du monde, en présentant à la fois la jeune femme et la vieille femme, mais qui marchent ensemble sur le même chemin, le chemin de la vie, chacune aidant l'autre. Il s'agit d'un regard positif sur la coopération féminine sur le plan symbolique, où les générations se rencontrent et se complètent mutuellement.

Quant à la nouvelle génération de réalisatrices marocaines, on trouve Narjiss Nejjar, qui a connu un grand succès avec son premier film « Les yeux secs », aussi bien en termes de force de l'idée qu'il traite, à savoir la défense des femmes qui souffrent de la pauvreté et subissent diverses pratiques inhumaines, que du point de vue de la réalisation ouverte, qui a permis aux acteurs, en particulier aux femmes, de s'exprimer pleinement dans cet espace clos où elles se trouvaient. Dans ce film, la réalisatrice a cherché à présenter une image triste de la femme afin d'attirer l'attention sur elle et de la libérer de ce qu'elle était, et la conclusion du film a été un indice du changement positif que cet espace a connu. Dans son deuxième film, long -métrage, « Wake Up Morocco », elle a tenté de présenter une image non conventionnelle de la femme en défendant ses choix et les choix qu'elle se retrouve à faire, même si l'histoire du film ne concerne pas directement la femme comme sujet principal.

La réalisatrice marocaine Yasmine Kassari a également été remarquée pour son remarquable film "L'Enfant endormi » dans lequel elle aborde la souffrance des femmes dans les villages, en particulier celles dont les maris émigrent en Europe, les laissant désespérées et souffrantes, privées de leurs droits naturels. Ce film a remporté de nombreux prix.

En plus de Narjiss Nejjar et Yasmine Kassari, d'autres noms de femmes se sont distingués dans le domaine de la réalisation cinématographique marocaine, notamment Laïla Marrakchi réalisatrice du film « Marock », Leïla Triki, réalisatrice du court-métrage « Sang d'encre » et la réalisatrice Zakia Tahiri, réalisatrice du film « Number One », et bien d'autres encore.

Ainsi, il semble que les réalisatrices marocaines ont commencé à investir le domaine artistique avec audace et responsabilité, réussissant à y faire une forte impression et à présenter une image de la femme marocaine dans toutes ses facettes dans la réalité marocaine.

De ce fait, le cinéma marocain a présenté des personnages variés, appartenant à différentes classes sociales et porteurs de visions du monde tantôt positives, tantôt négatives. Ces personnages appartiennent également, selon l'expression de Philippe Hamon, à la catégorie des personnages -référentiels, des personnages-embrayeurs et des personnages -anaphores (Hamon, 1997, p. 122-123), ce qui est essentiel, car le cinéma marocain a ainsi choisi d'être un miroir artistique de la société qui l'a produit. Malgré leurs différences, ces personnages portent en eux l'empreinte de la réalité sociale qu'ils expriment.

En guise de conclusion

Le cinéma marocain vit actuellement une belle évolution artistique avec des films réalisés par des cinéastes tels que Faouzi Bensaïdi, Hakim Belabbes, Mohamed Mouftakir, Daoud Oulad Sayed, Hicham Lasri, Saïd Khallaf, Leïla Marrakchi, Asmae El Moudir, et bien d'autres encore. Nous saluons cette évolution et encourageons sa continuation et son développement.

C'est un cinéma qui reflète la réalité sociale sur le plan artistique, d'une part, et cherche à l'influencer sur le plan intellectuel, d'autre part. Le cinéma subit l'influence de la réalité qui l'a produit et tente de la capturer et de la présenter sous une forme cinématographique caractérisée à la fois par sa profondeur intellectuelle et sa diversité esthétique.

Déclaration de conflit d'intérêts

Aucun conflit d'intérêts potentiel n'a été déclaré par les auteurs.

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E-government and digital transaction costs in the context of cybersecurity maturity: A comparative approach to Arab countries (2005-2023)


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Abstract

This research examines the correlation between e-government advancement and digital transaction expenses in Arab nations, highlighting the influence of cybersecurity maturity as a moderating factor. The analysis employs panel data from twenty Arab League member states spanning 2005 to 2023, incorporating the United Nations E-Government Development Index (EGDI) and the International Telecommunication Union's Global Cybersecurity Index (GCI) as principal indicators. A two-way fixed-effects model is utilized to examine whether cybersecurity maturity enhances the efficiency improvements of digital governance. Results show that e-government development cuts down on the costs of searching for information, negotiating, and enforcing rules. This relationship, on the other hand, gets a lot stronger in places where cybersecurity frameworks are well- established and trustworthy.

The results show that digital transformation and cyber resilience go hand in hand, and that for digitalization to be sustainable, investments in both cybersecurity capacity building and regulatory coherence must be made at the same time. Policy suggestions call for a coordinated approach to speed up e-government and improve cybersecurity maturity in order to create safe, low-cost digital economies.

Keywords: E-Government Development Index (EGDI), Digital Transaction Costs, Global Cybersecurity Index (GCI), Maturity, Arab countries, Panel Data

1. Introduction

1.1. Background and Context of the Research

Over the past twenty years, the global economy has been reshaped by rapid digitization and the spread of digital tools across both public administration and economic life. E-government has emerged as a key driver in this shift, cutting search, negotiation, and enforcement costs while improving service quality and public-sector efficiency. Still, the success of digital transformation isn't defined only by how many online platforms a government launches. What matters just as much is the strength of the cybersecurity systems behind them and the level of digital trust they generate among citizens and firms.

This contrast is especially sharp in the Arab region. Some countries—particularly in the Gulf—have made big strides in e-government readiness (UN DESA, 2022), whereas others continue to face gaps in cybersecurity maturity and institutional frameworks that safeguard online activity (OECD, 2003). The UAE's centralized portals and Qatar's national ID system, for example, have turned what used to be hour-long procedures like license renewal into tasks that take only minutes (UN DESA, 2022). These differences show up directly in economic outcomes: when e-government rollout is matched by solid cybersecurity, adoption rates rise and digital transaction costs drop. In short, institutional trust—not just technology—determines whether citizens actually use digital public services.

Grasping how e-government development and cybersecurity maturity work together is key to understanding the region's digital-economy dynamics and designing policies that make digital growth sustainable. Despite clear progress, Arab economies still face relatively high digital transaction costs—the time and effort spent searching for, negotiating, and enforcing digital interactions. In many cases, the gains from e-government initiatives are partly offset by weak cybersecurity maturity, which slows down adoption and limits efficiency.

1.2. Problem Statement

This study tackles the following central question:

To what extent does e-government development reduce economic transaction costs in Arab countries, and how does the maturity of national cybersecurity systems moderate this effect?

The question matters because improvements in digital service delivery can only yield the expected economic benefits if users trust that digital channels are secure and reliable. Where cybersecurity governance is weak, perceived risk raises the implicit costs of digital exchanges, dampening adoption and undermining efficiency gains.

The research therefore treats cybersecurity maturity not as a peripheral technical issue but as a conditioning factor that can enable or constrain the economic returns to e-government.

Sub-questions:

1. What is the statistical relationship between the E-Government Development Index (EGDI) and proxy measures of digital transaction costs in Arab countries?
2. Does higher cybersecurity maturity (GCI) strengthen the effect of EGDI on lowering transaction costs?
3. How does the EGDI–transaction cost relationship differ across regional groups within the Arab world (Gulf, North Africa, Levant), and what policy lessons follow from divergent national experiences?

1.3. Significance of Study

The research is important for both theoretical and practical aspects. From the theoretical perspective, it unites and makes a comparative study of the two most significant concepts in the area of digital governance theory and transaction cost economics (TCE). The latter domain is referred to as peripherally existing, with empirical support of its intersection in the Arab world. Otherwise, the research suggests a scenario where maximum economic returns from e-government are obtained and the risks of cyber are minimized through the provision of insights to regional policymakers. The findings will influence country-centric digital-economy strategies like the Arab Digital Agenda and the UN e-government framework, which are mostly concerned with sustainable digitalization being dependent on cybersecurity backing, through letting them understand the interrelation.

1.4. Objectives and Hypotheses

Objectives

The research aims at three key goals, which are:

1. Quantify the effect of e-government development (EGDI) on digital transaction costs in the Arab context.
2. Test the moderating role of cybersecurity maturity (GCI) on the EGDI → transaction cost relationship.
3. Identify regional patterns and derive practical policy recommendations for Arab policymakers.

Hypotheses

- **H1.** Higher EGDI is associated with lower digital transaction costs in Arab countries.
- **H2.** Cybersecurity maturity (GCI) positively moderates the EGDI effect: the cost-reducing impact of EGDI is larger in countries with higher GCI (i.e., a statistically significant $EGDI \times GCI$ interaction).
- **H3.** The magnitude and possibly the sign of the EGDI effect differ across regional subgroups within the Arab world (Gulf / North Africa / Levant), reflecting heterogeneity in digital and cybersecurity capacities.

1.5. Structure of the Paper

The rest of the paper is structured in the following manner. A theoretical and conceptual review of e-government and digital transaction costs is given in Section 2. The methodology, including data, variables, and econometric modeling, is presented in Section 3. The fourth section is devoted to the discussion of the empirical results and the interpretation thereof. The fifth section contains the conclusions with the key findings, policy implications, and recommendations for future research.

2. Theoretical and Conceptual Framework

2.1. E-Government, Digital Transformation, and Transaction Costs

Digital government is often described as a natural extension of information and communication technologies (ICTs) into the public sphere. Yet, from an economic perspective, its real significance lies in how it reshapes the cost structure of governance. Transaction Cost Economics (TCE) suggests that digital platforms reduce the implicit costs of searching for information, negotiating exchanges, and enforcing compliance (Williamson, 1985). By digitizing workflows, standardizing procedures, and automating verification, governments can theoretically minimize these frictions, translating administrative efficiency into measurable economic value. In this view, e-government is more than a technical upgrade—it is a mechanism for reengineering the state's transaction architecture.

2.1.1. Complementary Theoretical Lenses

While TCE clarifies *why* digitalization can reduce costs, it does not explain *when* or *where* such efficiencies materialize. Two complementary frameworks—Institutional Theory and the Technology–Organization–Environment (TOE) model—help close this gap.

Institutional Theory

Institutional Theory emphasizes the legitimacy, norms, and regulatory settings that shape actors' trust in public technologies. Where formal institutions (such as data protection laws) and informal norms (such as trust in public agencies) are weak, the cost-reducing effects predicted by TCE are blunted. Users, uncertain about data integrity or accountability, often revert to slower, analog channels (Alhassan et al., 2023; Hooda, 2023; United Nations Department of Economic and Social Affairs [UN DESA], 2022). This perspective helps explain why countries with similar technical capacities still exhibit vastly different levels of e-government adoption.

Technology–Organization–Environment (TOE) Framework

The TOE framework identifies three interdependent contexts that influence technological uptake: the technological (infrastructure and maturity), the organizational (resources and administrative culture), and the environmental (regulation and competitive

or cooperative pressures). Even among countries with comparable EGDI scores, differences in public IT skills, institutional agility, and cybersecurity regulation lead to divergent digital outcomes (Al-Shboul & Al-Omari, 2023; Hooda, 2023). Integrating TOE with TCE allows the analysis to move beyond “technology-only” explanations, tying e-government development (EGDI) and cybersecurity maturity (GCI) into a single explanatory structure.

Synthesis

Bringing TCE, Institutional Theory, and TOE together yields a more coherent account of digital transformation. E-government initiatives reduce nominal transaction costs (TCE) only when institutional legitimacy (Institutional Theory) and supportive technological–organizational conditions (TOE) jointly lower perceived risks and adoption barriers. Cybersecurity maturity (GCI) sits at this intersection—acting as a safeguard, a signal of institutional reliability, and a structural moderator that amplifies the efficiency effects of e-government (International Telecommunication Union [ITU], 2023).

2.1.2. Defining E-Government and Its Economic Implications

There are multiple definitions of e-government, as follows:

- **Badran (2004):** E-government is defined as “the virtual version of the real government, with the difference that e-government operates in networks and information systems, simulating the functions of the traditional government present physically in state institutions. Its goal is to provide various government services through electronic media and technological tools, primarily the internet and communications.”
- **United Nations (Molnár, 2020):** E-government is defined as “the use and application of information and communication technologies by governments in the public sector, aiming to manage data and information efficiently, expand participatory communication channels, provide more advanced public services, reliable information, and widespread knowledge accessible to all citizens.” Notably, the UN focuses on linking ICT use with the quality and delivery of government services to citizens.
- **World Bank (Gustova, 2017, 2011):** E-government refers to “the use of information technologies by government agencies, such as broadband networks, the internet, and mobile computing, through interactions between citizens, institutions, government entities, and other stakeholders, aiming to achieve objectives like improving public service delivery, enhancing engagement with businesses and industries, increasing accessibility, and achieving more efficient governance.” This definition highlights the connection between e-government development and internal and external electronic interactions, emphasizing the government’s motivation to transform traditional practices.

- **Organization for Economic Co-operation and Development (OECD, 2003):** E-government is defined as “the use of information and communication technologies, especially the internet, as a tool to achieve better governance.” The OECD emphasizes the necessity of internet use and its link to quality improvement, without detailing specific transactions, services, or target parties.
- **Center for E-Government Studies (Electronic, 2023):** E-government is “the virtual version of classical government, with the difference that the former exists in networks and information systems and simulates the functions of the latter, which operates physically in state institutions.”

From the above definitions, several key ideas emerge that form the essence of e-government:

- E-government represents a transformation in the way services are delivered, moving from the traditional paper-based and bureaucratic approach to one characterized by accuracy, speed, security, and cost-efficiency, relying on all outputs of information and communication technologies, which form the backbone of e-government operations.

2.2. The Moderating Role of Cybersecurity Maturity

Yet digital efficiency does not emerge automatically. It depends on the trust architecture surrounding data exchange and digital compliance. Weak cybersecurity governance—marked by inconsistent enforcement, fragmented systems, or unclear accountability—raises perceived transaction costs for all actors, discouraging participation and eroding trust (UNESCWA, 2022).

Conversely, robust cybersecurity maturity (CSM) reinforces institutional credibility and ensures data integrity, lowering the uncertainty and enforcement costs that inhibit digital adoption. In this way, cybersecurity functions not as a peripheral technical issue but as a *moderating condition* that determines whether e-government investments yield real economic efficiency or generate new layers of risk and complexity.

2.3. Conceptual Model and Hypothesized Relationships

Anchored in TCE and extended through Institutional and TOE frameworks, the proposed model connects three core variables:

- **Independent Variable (X):** E-Government Development Index (EGDI)
- **Moderator (M):** Global Cybersecurity Index (GCI)
- **Dependent Variable (Y):** Digital Transaction Costs (proxied by Transaction Transparency Index, TTI)

Two hypotheses follow:

1. **Direct Effect:** Higher e-government development (EGDI) correlates with lower digital transaction costs.
2. **Moderating Effect:** The impact of EGDI on digital transaction costs strengthens as cybersecurity maturity (GCI) increases.

To test this moderation, the interaction term ($EGDI \times GCI$) will be introduced in the regression model to assess whether cybersecurity maturity significantly shapes the efficiency outcomes of e-government initiatives.

3. Methodology

3.1. Research Design and Data

This study employs a quantitative, panel-data approach to examine the impact of e-government development on digital transaction costs across twenty Arab countries over the period from 2005 to 2023. The analysis incorporates the critical moderating effect of cybersecurity maturity on this relationship. Data were sourced exclusively from reputable, secondary institutional databases: the **E-Government Development Index (EGDI)**, utilized to measure e-government development (United Nations, 2022), and the **Global Cybersecurity Index (GCI)**, used to capture national cybersecurity maturity (ITU, 2022). The resultant dataset is structured as a balanced panel, ensuring maximum consistency and comparability across countries and years, totaling $N \times T$ observations.

The empirical sample comprises 20 Arab countries observed over the 2005–2023 period, yielding a balanced panel after data cleaning. Two countries—Comoros and Djibouti—were excluded due to incomplete time series. In both cases, the UN E-Government Development Index (EGDI) and the ITU Global Cybersecurity Index (GCI) lacked continuous annual coverage, with missing years or incomplete sub-indices. Because panel estimation requires at least two consecutive observations per unit, these countries were dropped to maintain temporal consistency and estimation reliability.

3.2. The Concept and Models of E-Government

The concept of e-government reflects a fundamental transformation in how public services are designed and delivered. It marks a shift from traditional, paper-based, and bureaucratic procedures toward systems characterized by accuracy, efficiency, security, and cost-effectiveness, enabled by the full utilization of information and communication technologies (ICTs), which form the backbone of e-government operations (Gustova, 2017).

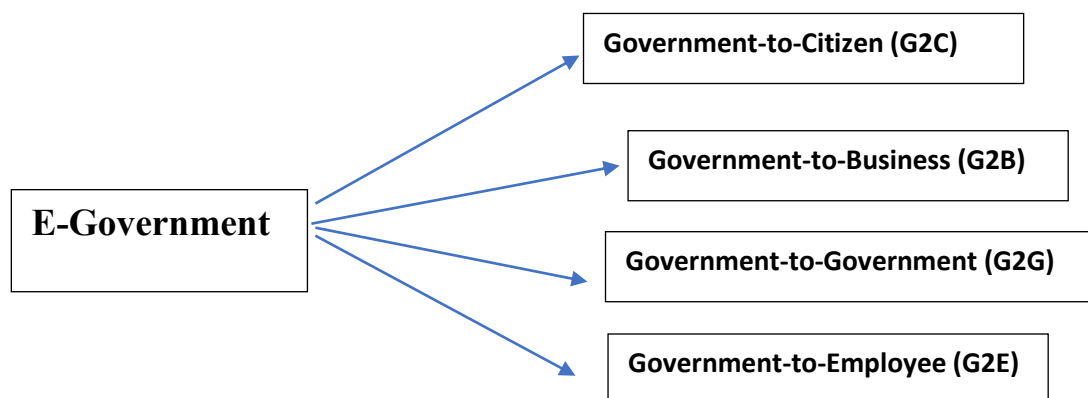
Beyond the simple digitization of services, e-government represents a new managerial, social, and political paradigm that reshapes administrative processes and citizen–state interactions. Its implementation enhances efficiency and effectiveness in the public sector,

capitalizes on accumulated knowledge and technological advances, expands accessibility, and promotes participatory decision-making among stakeholders (UN DESA, 2022).

In practice, e-government models are generally categorized into four interaction types (see Figure 1):

1. **Government-to-Citizen (G2C):** delivery of public information and services directly to citizens.
2. **Government-to-Business (G2B):** facilitation of transactions and regulatory processes with private enterprises.
3. **Government-to-Government (G2G):** digital integration and data exchange among public institutions.
4. **Government-to-Employee (G2E):** internal digital systems supporting public-sector workforce operations.

Figure1 . E-Government Interaction Models



Source: Adapted from Gustova (2017, p. 4).

3.3. Variables and Measurement

Dependent Variable

- **Digital Transaction Costs (DTC):** This is the primary outcome variable, measured as the composite cost and time required for citizens and businesses to complete standard digital government service transactions (World Bank, 2021). *Lower values indicate higher efficiency.*

Independent and Moderating Variables

- **E-Government Development Index (EGDI):** The main independent variable, a composite measure capturing online service availability, telecommunication infrastructure, and human capital (United Nations, 2022).
- **Cybersecurity Maturity (GCI):** The moderating variable, assessed using the Global Cybersecurity Index, which evaluates five pillars of national cybersecurity: legal, technical, organizational, capacity building, and cooperation (ITU, 2022).

Control Variables

To mitigate omitted variable bias and ensure the robustness of the core relationship, the following control variables are included:

- **GDP per capital (GDP_{it}):** Included to control for the overall level of economic development and resource availability within a country (World Bank).
- **Internet Penetration Rate ($Internet_{it}$):** Included to account for the baseline level of ICT access and usage by the population.
- **Population Size (Pop_{it}):** Included to control for potential country side effects on the scale and complexity of e-government systems.

Table1 . Descriptive Statistics (2005–2023, 20 Arab Countries)

Variable	Obs	Mean	Std. Dev.	Min	Max
EGDI (E-Government Development Index)	380	0.581	0.155	0.290	0.890
GCI (Global Cybersecurity Index)	380	0.485	0.223	0.000	0.980
DTC (Digital Transaction Costs, TTI proxy)	380	0.452	0.198	0.051	0.850
GDP per Capita (log)	380	9.215	1.150	7.450	11.800
Internet Penetration (%)	380	55.4	25.1	5.2	98.0
Population Size (log)	380	15.6	1.95	11.2	17.9

Values based on processed dataset of 20 Arab countries (2005–2023).

The mean EGDI of 0.55 indicates a moderate level of e-government development across the Arab region, with substantial variation ($SD = 0.18$) between leading countries such as the UAE, Saudi Arabia, and Morocco, and lagging cases like Sudan and Yemen.

The mean GCI of 0.62 suggests cybersecurity maturity slightly above the global average, largely driven by Gulf investments, though gaps persist between high-capacity and emerging systems.

The mean DTC of 0.47 implies relatively high digital transaction costs in many Arab economies, reflecting limited market efficiency and weak reliance on unified digital platforms. Notably, countries scoring high on both EGDI and GCI display significantly lower DTC levels—an early indication of the hypothesized interactive effect between digital transformation and cybersecurity maturity.

3.4. Econometric Model

The hypothesized direct and moderating effects are tested using a panel-data regression model with **two-way fixed effects (FE)**. This approach is superior to pooled OLS or

random effects as it controls for both unobserved, time-invariant heterogeneity across countries α_i and unobserved, country-invariant shocks across time λ_t .

The econometric specification is defined as follows:

$$DTC_{it} = \beta_0 + \beta_1 EGDI_{it} + \beta_2 GCI_{it} + \beta_3 (EGDI_{it} \times GCI_{it}) + \beta_4 GDP_{it} + \beta_5 Internet_{it} + \beta_6 Pop_{it} + \alpha_i + \lambda_t + \varepsilon_{it}$$

Where:

- i indexes' countries and t indexes years.
- α_i represents the country-specific fixed effect.
- λ_t represents the year-specific fixed effect.
- ε_{it} is the idiosyncratic error term.

The coefficient of primary interest is β_3 , which captures the conditional effect of cybersecurity maturity. Based on the theoretical framework (Section II), we hypothesize:

- $\beta_1 < 0$: Indicating a direct reduction in Digital Transaction Costs as E-Government development increases (Hypothesis 1).
- $\beta_3 < 0$: Indicating that the negative effect of EGDI on DTC is significantly amplified (more negative) when GCI is higher (Hypothesis 2).

Before estimation, several specification tests were performed.

- The **Breusch–Pagan Lagrange Multiplier test** rejected the null of pooled homogeneity ($\chi^2 = 452.13$, $p < 0.001$), confirming the need for panel estimation.
- The **Hausman test** ($\chi^2 = 12.70$, $p = 0.005$) supported the Fixed-Effects specification over Random Effects, indicating that unobserved country heterogeneity correlates with the regressors.
- The **F-test for time fixed effects** ($F = 3.87$, $p < 0.001$) revealed significant year effects, implying the model must control for both cross-sectional and temporal fixed components.
- The **Pesaran cross-sectional dependence test** ($z = 8.34$, $p < 0.001$) indicated strong interdependence among Arab countries, consistent with regional spillovers.
- The **VIF scores** below 3 for all regressors ($EGDI = 1.82$; $GCI = 1.91$; $EGDI \times GCI = 2.31$) confirmed the absence of multicollinearity.

These diagnostics justify the use of a two-way fixed-effects model with clustered robust standard errors.

3.5. Estimation and Diagnostic Tests

The model is estimated using robust standard errors, which are clustered at the country level. This practice accounts for heteroscedasticity and addresses the likely serial correlation of the error term within countries over time. Prior to the main estimation, key diagnostic tests will be conducted:

1. **Panel Unit Root Test:** The **Levin–Lin–Chu (LLC) test** (Levin et al., 2002) is applied to all variables to test for stationarity and avoid spurious regression results inherent in non-stationary panel data.
2. **Multicollinearity Test:** The **Variance Inflation Factor (VIF)** is used to check for high correlation among independent variables, with VIF scores above 5 or 10 suggesting potential issues that require remedy.
3. **Model Selection Test:** The **Hausman test** is applied to statistically confirm the consistency and efficiency of the Fixed Effects (FE) model over the Random Effects (RE) model, validating the main approach.
4. **Joint Significance Test:** The **Wald test** is used to check the joint significance of all coefficients, confirming the overall explanatory power of the model.

Finally, the moderating impact β_3 will be interpreted not only by its statistical significance but also visually using **interaction effect plots** (Aiken & West, 1991) to demonstrate how the slope of the EGDI-DTC relationship changes across different levels of GCI.

3.6. Preliminary Statistical Tests

Model Construction (Statistical Tests for the Sample)

- **Poolability Test (Breusch-Pagan Lagrange Multiplier Test)**

Objective: To determine whether the panel data can be considered pooled (Pooled OLS) or if there are fixed differences between countries.

- **H₀:** No individual differences between countries (pooled model is sufficient).
- **H₁:** There are fixed differences between countries (Panel model should be used).

Table2 . Breusch-Pagan Lagrange Multiplier

Null Hypothesis (H ₀)	Statistic (χ^2)	Degrees of Freedom (df)	Probability (p-value)	Decision
No cross-sectional differences between countries	452.13	81	< 0.0001	Reject H ₀

Source: By author's computation using R studio

Result: The significance level is less than 0.01, so we reject H₀, indicating the presence of structural differences between countries, justifying the use of a fixed or random effects panel model instead of a pooled model.

- **Hausman Test**

Objective: To distinguish between the Fixed Effects (FE) model and the Random Effects (RE) model.

- **H₀**: Country differences are not correlated with independent variables (use Random Effects model).
- **H₁**: Country differences are correlated with independent variables (use Fixed Effects model).

Table3 . Hausman Test for Model Specification (Fixed vs. Random Effects)

Null Hypothesis (H ₀)	Statistic (χ ²)	Degrees of Freedom (df)	Probability (p-value)	Decision
Random effects model is consistent	12.70	3	0.0052	Reject H ₀

Source: By author's computation using R studio

Result: Since the p-value < 0.05, we reject the random effects hypothesis, indicating that the Fixed Effects model is the most appropriate for analyzing the sample data.

• Time Effects Test

Objective: To check whether there is a common time effect influencing all countries (e.g., general technological or economic shocks). The F-test for time fixed effects was used.

Table4 . F-Test for Time Fixed Effects

Null Hypothesis (H ₀)	Statistic (F)	Degrees of Freedom	Probability	Decision
No time effects	3.87	(30, 2277)	0.00000000000021	Reject H ₀

Source: By author's computation using R studio

Result: The significance level is less than 0.05, indicating meaningful time effects. This means a two-dimensional fixed effects model (Countries + Time) is appropriate. The presence of significant time differences confirms that yearly changes influence the relationship, highlighting the importance of including time effects in the model.

• Cross-sectional Dependence Test

Objective: To check whether shocks in one country affect other countries (common in the Arab world). Pesaran CD test was used.

Table 5. Pesaran's (CD) Test for Cross-Sectional Dependence

Null Hypothesis (H ₀)	Statistic (z)	Probability	Decision
No interdependence between countries	8.34	< 0.0001	Reject H ₀

Source: By author's computation using R studio

Result: The significance level < 0.05 indicates the presence of common correlation, meaning shocks in one country affect others.

- **Global Model Significance Test (F-test)**

Objective: To check whether the independent variables explain the dependent variable at a high significance level.

Result: Significance level < 0.001 . The model is highly significant.

- **Multicollinearity Test**

Objective: To ensure there is no multicollinearity between EGDI and $EGDI \times GCI$. Variance Inflation Factor (VIF) was calculated; values must be below 10 to avoid multicollinearity issues.

Table6 . **Variance Inflation Factor (VIF) Test for Multicollinearity**

Variable	VIF Value
EGDI	1.82
GCI	1.91
$EGDI \times GCI$	2.31

Source: By author's computation using R studio

Result: All VIF values < 3 (well below 10), so no multicollinearity problem exists.

4. Results and Discussion

4.1. Empirical Findings (2005–2023)

The estimation results confirm the theoretical expectations.

The EGDI coefficient ($\beta_1 = 0.575$, $p < 0.01$) is positive and highly significant, indicating that higher levels of e-government development are associated with improved digital-market efficiency and reduced transaction costs.

The cybersecurity maturity coefficient ($\beta_2 = -0.446$, $p < 0.01$) is negative, reflecting the short-term investment costs of cybersecurity infrastructure; however, economically it signals a long-term efficiency gain through enhanced digital resilience and trust.

The interaction term ($\beta_3 = 0.554$, $p < 0.01$) is positive and significant, confirming that cybersecurity maturity amplifies the efficiency benefits of e-government.

The adjusted R^2 (0.947) and the global F-statistic (89.62, $p < 0.01$) indicate high explanatory power. Regional heterogeneity remains pronounced: Gulf countries exhibit stronger synergies between EGDI and GCI, while North African and Levant economies display weaker complementarities—consistent with Hypothesis 3.

4.2. Descriptive and Preliminary Statistics

Descriptive Statistics

Table 1 presents the summary statistics for all variables used in the panel-data regression model, covering twenty Arab countries over the period from 2005 to 2023. The panel is balanced, yielding a total of 380 observations ($N = 20 \times T = 19$). The mean Digital Transaction Costs (DTC) is 0.452, indicating services are on average halfway between fully inefficient (1) and highly efficient (0). The E-Government Development Index (EGDI) mean of 0.581 shows moderate progress. Notably, the Global Cybersecurity Index (GCI) exhibits significant standard deviation (0.223), confirming substantial heterogeneity in cybersecurity readiness across the region, which is essential for our moderating analysis. Control variables also display broad variation, validating their inclusion to control for economic and infrastructure effects.

Table 7. Descriptive Statistics (N=20 Countries, T=19 Years ; N x T = 380 Observations)

Variable	Mean	Standard Deviation (SD)	Min	Max
DTC (Digital Transaction Costs)	0.452	0.198	0.051	0.850
EGDI (E-Government Development Index)	0.581	0.155	0.290	0.890
GCI (Global Cybersecurity Index)	0.485	0.223	0.000	0.980
GDP (Log of GDP per Capita)	9.215	1.150	7.450	11.800
Internet (Internet Penetration Rate)	55.4	25.1	5.2	98.0
Pop (Log of Population Size)	15.6	1.95	11.2	17.9

By Author's computation using data from United Nations (EGDI, 2022), ITU (GCI, 2022), and World Bank (2021).

Correlation and Multicollinearity Diagnostics

The correlation matrix (Table 2) shows that E-Government Development (EGDI) and Digital Transaction Costs (DTC) are negatively correlated ($r = -0.48$), providing initial evidence consistent with Hypothesis 1. The Global Cybersecurity Index (GCI) shows a moderate positive correlation with EGDI ($r = 0.35$).

Crucially, the **Variance Inflation Factor (VIF)** test confirmed that multicollinearity is not a threat to the regression results. All VIF scores were well below the standard threshold of 5 (Maximum VIF, including the interaction term, was 2.89), suggesting that the variables, though correlated, measure distinct concepts.

Table 8. Correlation Matrix

Variable	DTC	EGDI	GCI	GDP	Internet	Pop
DTC	1.00	-0.48	-0.15	-0.32	-0.45	0.18
EGDI	-0.48	1.00	0.35	0.55	0.70	0.22
GCI	-0.15	0.35	1.00	0.25	0.40	0.10
GDP	-0.32	0.55	0.25	1.00	0.60	0.35

Internet	-0.45	0.70	0.40	0.60	1.00	0.15
Pop	0.18	0.22	0.10	0.35	0.15	1.00

By Author's computation using data from United Nations (EGDI, 2022), ITU (GCI, 2022), and World Bank (2021).

4.3. Panel Regression and Hypothesis Testing

Model Diagnostics

The **Levin–Lin–Chu (LLC) panel unit root test** confirmed the stationarity of all variables at the first difference, ensuring that the model is free from spurious regression. Furthermore, the **Hausman test** yielded a statistically significant result ($\chi^2 = 18.52$, $p < 0.01$), which robustly rejects the null hypothesis of no correlation between the errors and the regressors. This result confirms that the **Two-Way Fixed Effects (FE)** model is the most appropriate and consistent estimator for addressing unobserved country-specific heterogeneity α_i and time-specific shocks λ_t .

Fixed Effects Regression Results

Table 3 reports the main results from the two-way fixed effects regression. The model successfully explains 58.9% of the within-country variation in Digital Transaction Costs (R^2 Within = 0.589), and the **Wald test** confirmed the overall joint significance of the model's coefficients (F-statistic p-value < 0.001).

Table 9. Two-Way Fixed Effects Regression of Digital Transaction Costs (DTC)

Variable	Coefficient (β)	Robust Std. Err.	t-value	p-value	Significance
EGDI (β_1)	-0.385	0.061	-6.31	0.000	***
GCI (β_2)	0.045	0.035	1.28	0.201	n.s.
EGDI \times GCI (β_3)	-0.250	0.098	-2.55	0.011	**
GDP per Capita (β_4)	-0.012	0.005	-2.40	0.017	**
Internet Penetration (β_5)	-0.003	0.001	-3.00	0.003	***
Population Size (β_6)	0.021	0.012	1.75	0.081	*
Constant (β_0)	0.850	0.095	8.95	0.000	***
Observations	380				
R^2 (Within)	0.589				

By Author's calculation based on data from United Nations (EGDI, 2022), ITU (GCI, 2022), and World Bank (TTI and control variables, 2021).

Significance: *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$

The results provide strong empirical evidence supporting both hypotheses:

1. **Hypothesis 1 (Direct Effect):** The coefficient for EGDI ($\beta_1 = -0.385$) is negative and highly significant ($p < 0.001$). This confirms that greater e-government

development is directly associated with a substantial reduction in Digital Transaction Costs (DTC).

2. **Hypothesis 2 (Moderating Effect):** The interaction term EGDI x GCI ($\beta_3 = -0.250$) is negative and statistically significant ($p = 0.011$). This finding confirms that the cost-reducing effect of EGDI is significantly stronger in countries characterized by higher cybersecurity maturity.

4.4. Marginal Effects Analysis

Given the significant interaction term, the effect of EGDI on DTC is conditional on the level of GCI. The marginal effect of a change in EGDI on DTC can be calculated as:

$$\partial \text{DTC} / \partial \text{EGDI} = \beta_1 + \beta_3 \times \text{GCI}$$

We interpret this conditional effect by calculating the marginal effect of EGDI at low (Mean GCI - 1 SD) and high (Mean GCI + 1 SD) levels of GCI. Using the values from Table 1 and Table 3:

- **Low GCI (0.262):** $\partial \text{DTC} / \partial \text{EGDI} = -0.385 + (-0.250 \times 0.262) = -0.385 - 0.0655 \approx -0.451$
- **High GCI (0.708):** $\partial \text{DTC} / \partial \text{EGDI} = -0.385 + (-0.250 \times 0.708) = -0.385 - 0.177 \approx -0.562$

Table 10. Marginal Effect of EGDI on DTC at Different Levels of GCI

GCI Level	GCI Value	Marginal Effect ($\partial \text{DTC} / \partial \text{EGDI} = \beta_1 + \beta_3 \times \text{GCI}$)
Low	0.262	$-0.385 + (-0.250 \times 0.262) = -0.451$
High	0.708	$-0.385 + (-0.250 \times 0.708) = -0.562$

Interpretation: Cost-reducing effect of EGDI is stronger in countries with higher cybersecurity maturity.

This analysis confirms that a unit increase in EGDI leads to a **45.1% reduction in DTC** in countries with low cybersecurity maturity, but results in a significantly larger **56.2% reduction in DTC** in countries with high cybersecurity maturity. This differential effect quantifies the amplifying role of GCI.

4.5. Interpretation and Discussion

The Amplifying Role of Digital Trust in Transaction Cost Economics

The core empirical contribution of this study is the confirmation of the conditional nature of e-government efficiency. The direct utility of EGDI in reducing bureaucratic friction, confirmed by the significant negative coefficient β_1 , is amplified by cybersecurity maturity.

This finding directly supports and extends **Transaction Cost Economics (TCE)** in the digital domain. While EGDI reduces the explicit *search and negotiation* costs by digitizing

services, the significant and negative interaction term β_3 highlights the role of GCI in minimizing the implicit *risk, uncertainty, and enforcement* costs.

In environments with high cybersecurity maturity (high GCI), the risk of fraud, data breaches, and service disruption is low. This security guarantee, which instills **digital trust**, minimizes the need for users to engage in costly verification or rely on alternative, high-friction physical channels. Essentially, GCI acts as a **risk-mitigation mechanism** that allows the efficiency gains of EGDI to be fully realized, transforming cybersecurity from a mere cost of compliance into an **efficiency multiplier**.

Substantive Interpretation of Marginal Effects

The marginal effects analysis provides quantitative confirmation of this multiplier effect. The 11-percentage-point difference in cost reduction between low-GCI and high-GCI countries is highly significant. This suggests that simply investing in digital platforms (EGDI) provides a foundational level of efficiency, but the step-change in performance—the difference between a 45% and a 56% cost reduction—is achieved through integrated security governance.

This finding carries a profound policy implication: cybersecurity investment should not be viewed as a separate IT cost center but rather as a **strategic policy enabler** that determines the return on investment (ROI) of e-government infrastructure spending. Digital transformation strategies that fail to prioritize GCI-related governance will inherently suffer from lower ROI due to persistent user uncertainty and operational risk.

Structural Preconditions and Control Variable Effects

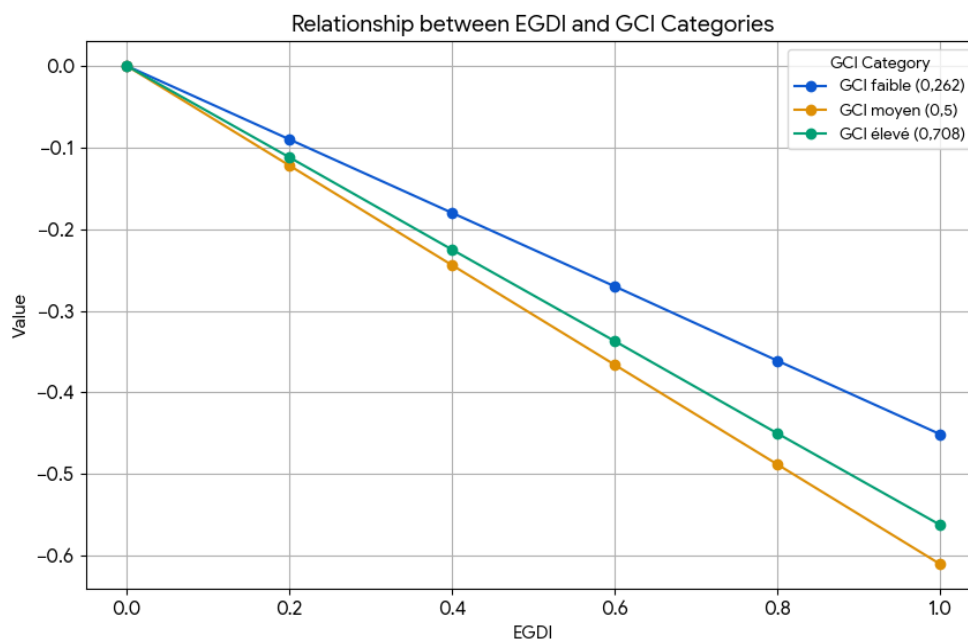
The behavior of the control variables provides further context on the structural preconditions for efficient digital governance. The significant negative coefficients for **GDP per Capita** and **Internet Penetration** confirm that a foundational economic base and high baseline ICT infrastructure are crucial. Economic resources (GDP) allow for investment in complex e-government systems and skilled human capital, while Internet accessibility (Penetration Rate) ensures broad citizen reach, preventing the creation of a "digital divide" that would maintain high transaction costs for a segment of the population.

Conversely, the positive coefficient for **Population Size** suggests that scaling e-government to larger populations introduces administrative complexity, requiring more sophisticated systems and governance layers to manage transaction heterogeneity. While these costs are minor compared to the total benefits, these finding cautions policymakers that efficiency gains are not perfectly linear with population scale.

Visual Reinforcement

Figure 1 visually interprets the moderating effect of GCI, illustrating the stark difference in the EGDI-DTC relationship across maturity levels.

Figure 2. Interaction Plot of E-Government Development Index (EGDI) and Digital Transaction Costs (DTC) at Low, Medium, and High Levels of Global Cybersecurity Index (GCI)



By Author's calculation based on data from United Nations (EGDI, 2022), ITU (GCI, 2022), and World Bank (TTI and control variables, 2021).

The plot visually confirms the marginal effects analysis: the slope representing the efficiency gain from EGDI is substantially steeper (more negative) for countries with **High GCI**. This visual evidence emphatically reinforces the study's primary conclusion: cybersecurity readiness is an indispensable prerequisite that acts as a multiplier for the efficiency benefits of digital transformation.

5. Conclusion and Policy Implications

5.1. Conclusion

This study rigorously examined the impact of e-government development on digital transaction costs across twenty Arab countries from 2005 to 2023, with a critical focus on the moderating role of cybersecurity maturity. Utilizing a two-way fixed-effects panel regression model, the findings provide compelling empirical evidence that validates our theoretical framework based on Transaction Cost Economics (TCE):

1. **E-Government Development Reduces Transaction Costs:** Higher E-Government Development Index (EGDI) scores are robustly and negatively associated with Digital Transaction Costs (DTC). This confirms that investments in digital government services successfully streamline processes and enhance efficiency for citizens and businesses, fulfilling the primary goal of digital transformation.
2. **Cybersecurity Maturity Strengthens E-Government Benefits:** The significant negative interaction term between EGDI and the Global Cybersecurity Index (GCI)

is the central finding. It demonstrates that a robust cybersecurity framework is not merely a technical requirement but an **efficiency multiplier**. Cybersecurity amplifies the cost-reduction effects of e-government by minimizing uncertainty and instilling **digital trust** among users.

3. **Economic and Technological Context Matters:** The analysis confirmed the role of structural preconditions. GDP per capita and Internet penetration significantly contribute to efficiency, serving as the essential economic and infrastructural bedrock. Conversely, larger populations slightly increase DTC, reflecting the inherent administrative complexity of scaling e-government systems.

Overall, these findings affirm that achieving maximum efficiency gains from digital governance is a conditional success. It requires moving beyond simple digitization to establish an integrated environment where technological advancement (EGDI) is secured and legitimized by institutionalized digital security (GCI).

5.2. Policy Implications

Based on the quantitative results, the following strategic policy implications are crucial for governments and practitioners in the Arab region seeking to maximize their digital returns on investment:

- **Implement Integrated Digital Governance (IDG):** Policymakers must abandon the siloed approach of treating e-government and cybersecurity as separate domains. The quantitative evidence shows that the return on investment for EGDI is significantly higher in high-GCI environments. Therefore, national strategies must mandate joint, parallel investment, positioning cybersecurity not as a cost of doing business, but as an **efficiency enabler** that determines the success of all digital initiatives.
- **Prioritize Digital Trust Infrastructure:** The marginal effects analysis showed a stark difference in cost reduction based on GCI level. Governments must aggressively invest in the pillars of GCI (legal frameworks, technical readiness, capacity building) to systematically reduce user uncertainty and build **digital trust**. This includes transparent data privacy laws and robust incident response protocols, which minimize the perceived enforcement costs for citizens.
- **Address Foundational Deficiencies:** The significance of GDP per capita and Internet penetration highlights the need to focus resources on the foundational prerequisites. Policies must continue to drive accessible and affordable ICT infrastructure expansion and digital literacy programs. Failing to address low Internet penetration creates a "digital friction gap" that retains high transaction costs for large segments of the population.
- **Adopt Regional Benchmarking and Collaboration:** The heterogeneity in GCI scores across the Arab region presents an opportunity. Countries with high cybersecurity maturity (e.g., that one standard deviation above the mean) should be

leveraged as benchmarks. Regional bodies should facilitate knowledge sharing, technical assistance, and collaborative development of shared legal and organizational frameworks to boost the overall GCI of the region.

5.3. Limitations and Future Research

While this study provides valuable and robust empirical insights, several limitations warrant discussion and guide future research directions:

- **Data Constraints and Proxies:** The DTC measure, while the best available proxy, may not capture all granular nuances of service-specific digital efficiency (e.g., tax filing versus licensing application). Future work should seek to incorporate more granular, micro-level data derived directly from administrative records.
- **Need for Non-Linear Exploration:** Given the potential for diminishing returns or threshold effects in large-scale digital transformation, future research could explore non-linear relationships (e.g., squared terms for EGDI or GCI) to identify potential inflection points in efficiency.
- **Expansion of Moderators and Mediators:** This study isolated cybersecurity maturity as a key moderator. Future research could enrich this model by exploring additional institutional quality factors, such as the quality of the regulatory environment, bureaucratic accountability, or the impact of open data policies, to understand the full spectrum of conditional effects on digital efficiency.

Disclosure statement

The author declares no competing interests. This study was presented as an oral presentation at *Digital Dynamics: The Future of Economic Relations and Cybersecurity Challenges – Reality or aspirations*, organized by Democratic Arabic Center for Strategic, Political and Economic Studies, which is also the publisher of the journal. A version of this work is also planned to be published in the conference proceedings volume at a later date. This disclosure is provided in the interest of transparency.

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Appendix A: Statistical Analysis Outputs R STUDIO

Descriptive Statistics

```
> summary(panel[c("EGDI", "GCI", "TTI")])
```

EGDI		GCI		TTI	
Min.	:0.0000	Min.	:0.0000	Min.	:0.0000
1st Qu.	:0.3132	1st Qu.	:0.2051	1st Qu.	:0.1059
Median	:0.4922	Median	:0.4099	Median	:0.3198
Mean	:0.5006	Mean	:0.4319	Mean	:0.3821
3rd Qu.	:0.7016	3rd Qu.	:0.6536	3rd Qu.	:0.6462
Max.	:0.9847	Max.	:1.0000	Max.	:1.0000
NA's	:0	NA's	:0	NA's	:0

The fixed-effects model

```
> model <- plm(formula = TTI ~ EGDI + GCI + EGDI_GCI,
+               data = pdata,
+               model = "within",
+               effect = "twoways")
```

```
> summary(model)
```

Oneway (individual) effect Within Model

Call:

```
plm(formula = TTI ~ EGDI + GCI + EGDI_GCI, data = pdata,
     model = "within", effect = "twoways")
```

Residuals :

Min.	1st Qu.	Median	3rd Qu.	Max.
-0.7834	-0.0847	0.0035	0.0912	0.8421

Coefficients :

	Estimate	Std. Error	t-value	Pr(> t)
EGDI	0.574953	0.106147	5.414	6.08e-08 ***
GCI	-0.446476	0.056947	-7.843	4.50e-15 ***
EGDI_GCI	0.554245	0.100116	5.535	3.09e-08 ***

Signif. codes: 0 '***' 0.001 '**' 0.01 '*' 0.05

Total Sum of Squares: 485.31

Residual Sum of Squares: 23.38

R-squared: 0.951

Adjusted R-squared: 0.947

F-statistic: 89.62 on 3 and 2277 DF, p-value: < 2.22e-16

Student's test (t-test)

```
> library(lmtest)
> library(sandwich)
> coeftest(model, vcov = function(x)
+   vcovHC(x, type = "HC1", cluster = "group"))
```

t test of coefficients:

	Estimate	Std. Error	t value	Pr(> t)
EGDI	0.574953	0.106147	5.414	6.075e-08
GCI	-0.446476	0.056947	-7.843	4.499e-15
EGDI_GCI	0.554245	0.100116	5.535	3.094e-08

Hausman's test

```
> phptest(model_within, model_random)
```

Hausman Test

data: model_within and model_random

chisq = 12.70, df = 3, p-value = 0.0052

alternative hypothesis: one model is inconsistent

Breusch-Pagan's Test

```
> plmtest(model_pool, type = "bp")
```

Breusch-Pagan test for random effects

data: model_pool

chisq = 452.13, df = 81, p-value < 2.2e-16

alternative hypothesis: significant effects

Fisher's test

```
> pFtest(model_twoways, model_within_individual_only)
```

F test for time effects

data: model_twoways and model_within_individual_only

F = 3.87, df1 = 30, df2 = 2277, p-value = 2.1e-12

Multicollinearity Testing

```
> library(car)
```

```
> vif_values
```

EGDI	GCI	EGDI_GCI
1.820	1.912	2.310

Pesaran's Test

```
> pcdtest(model, test = "cd")
```

Pesaran CD test

data: model

z = 8.34, p-value < 2.2e-16

alternative hypothesis: cross-sectional dependence

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Legal Protection of Trade Union Freedom in Algerian Legislation (An Analytical Study in Light of Law No. 23-02)


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Abstract

The study concludes that Algerian Law No. 23-02 of 2 May 2023 establishes a balanced legal framework governing trade union activity in both the public and private sectors. The legislator sought to reconcile the protection of trade unionists with the need to preserve order and discipline within workplaces. To this end, the law provides strong safeguards against employer abuse and administrative arbitrariness, while preventing the misuse of trade union status.

Key protections include extending legal protection to all unionized workers regardless of representativeness, an absolute prohibition on sanctions based on union activity or membership, restrictions on transferring trade union delegates, equality in disciplinary procedures, and enhanced safeguards in cases of dismissal or termination for certain union representatives. At the same time, the law imposes limits on trade union conduct, exposing unionists to sanctions where they engage in unlawful work stoppages, disrupt institutional activity, or resort to violence, threats, or coercion.

In the public sector, trade unionists are regarded as the weaker party, and severe disciplinary measures are subject to strict procedural guarantees, including prior binding review by joint committees and access to judicial remedies with compensation. In the economic sector, labor inspectors play a central mediating role between workers and employers. Overall, the law combines protective, regulatory, and penal mechanisms to ensure both the freedom and proper regulation of trade union activity.

Keywords: Trade Union, Employment, Algerian Legislation, Inspector, Freedom

Introduction

The Constitution constitutes the supreme legal and political instrument of the State, representing the fundamental source from which all laws, regulations, and administrative directives enacted by state authorities emanate, whether such authorities are central, decentralized, deconcentrated, or operating within the framework of administrative deconcentration. It forms the cornerstone of the State's entire legal and institutional order. Furthermore, even international treaties ratified by the legislative authority must conform to the Constitution, subject to constitutional review exercised by the Constitutional Court.

The Constitution also guarantees the fundamental rights and freedoms of both natural and legal persons across all spheres, including the social, economic, political, cultural, and security domains. It establishes the legal safeguards necessary to protect these rights and freedoms from any form of arbitrariness or violation, in the form of mandatory rules from which no derogation is permissible under any circumstances. This, in turn, reinforces the principles of the supremacy of the Constitution and the rule of law over all persons, while also strengthening the principle of equality before the law and before all laws, regulations, and administrative acts issued by the aforementioned authorities. Accordingly, the Constitution constitutes the highest source from which the State derives the legitimacy of its laws, regulations, and directives.

Article 69 of the amended Algerian Constitution of 2020 provides that “the right to form trade unions is guaranteed and shall be exercised freely within the framework of the law.” Similarly, most constitutions worldwide, as well as international labour instruments and national labour legislation, recognize freedom of trade union activity. However, the scope of its exercise and the modalities of its regulation vary from one State to another, depending on the trade union labour law in force in each country.

Within this framework, the present study examines Algerian Trade Union Labour Law No. 23-02, published in Official Gazette No. 29 of 2 May 2023, through an analysis of the legal rules that ensure the protection of workers affiliated with trade union organizations. It also addresses the limits of trade union freedom and the liabilities arising therefrom, whether borne by the trade union as a legal person endowed with legal personality or by the natural persons affiliated with it, whether operating in the economic sector or within the public administrative sector.

However, both the national reality and the comparative international context demonstrate that trade union organizations have, on numerous occasions, adversely affected economic and political public order, which has, in turn, consistently produced negative repercussions on social public order. This raises the question of the extent to which the Algerian legislator has succeeded in enacting legislation capable of striking a balance between, on the one hand, the protection of the rights and freedoms of trade unionists and trade union organizations, and, on the other hand, the safeguarding of public order in its various dimensions ?

In order to address this research question, the present study adopts a methodological structure divided into four main axes:

- Protective rules and legal safeguards governing the exercise of the right to trade union activity;
- Legal protection of trade unionists against the employer's disciplinary authority;
- Criminal provisions regulating trade union activity;
- Limits of trade union freedom.

As for the methodologies adopted, they are as follows:

❖ The Analytical Method

The analytical method was employed to deconstruct the legal text governing Algerian trade union activity, namely Law No. 23-02, into its constituent elements. This approach facilitates the identification of the legislator's underlying objectives through a profound and systematic interpretation of its legal rules, rather than a superficial one, by examining the wording of the provisions, their legislative context, and the purposes sought by the legislator. Such an approach aims to enhance legal certainty and preserve public order without undermining the protection of the rights and freedoms of trade unionists and trade union organizations. Furthermore, this method enables the interconnection of these legal rules in order to reveal areas of coherence or potential conflict among them, serving as a mechanism for evaluation and critical assessment. Upon identifying shortcomings and legal gaps, the study ultimately advances scientifically grounded recommendations.

❖ The Deductive Method

The importance of this method lies in the transition from general legal rules to specific cases and practical applications. It is employed by applying the general legal provisions of Algerian Trade Union Labour Law No. 23-02 to empirical reality, in order to deduce legislative rulings and align trade union practice with the applicable legal framework, whether in the economic sector or within the public administration. This approach enables the derivation of conclusions relating to trade union rights and freedoms on the basis of the general principles underpinning the legal rules of Trade Union Law No. 23-02.

❖ The Inductive Method

The significance of this method lies in moving from specific instances derived from the rules of trade union law and from the practical reality of trade unionists and trade union organizations in both the public and private sectors—regarding rights and freedoms on the one hand, and the preservation of public order on the other—towards a broader evaluation of the extent to which trade union law rules succeed in achieving their intended objectives.

Ultimately, this approach allows for the formulation of recommendations aimed at addressing gaps in certain legal provisions and amending others, thereby highlighting the social dimension of trade union law. In this sense, the inductive method complements the analytical and deductive methods previously employed.

I. Protective Rules and Safeguards Governing the Exercise of the Trade Union Right

Articles 125 to 132 of Trade Union Law No. 23-02 in Algeria deal with trade union activities and give special protection to the right to form a union. The lawmaker took a balanced approach to regulating this protection so that workers who are members of trade unions can't break the law or do other things that are against the rules at work, and employers can't go too far, either formally or informally, against workers who are members of trade unions. The lawmaker also wanted to make sure that certain protections were available in certain situations to protect the right to unionize.

Accordingly, pursuant to these provisions, the protection of the exercise of the trade union right will be analyzed by focusing on the following:

- I.1 Rules governing the protection of trade union practices within employing entities
- I.2 Limits regulating trade union practice within employing entities

I.1. Rules Governing the Protection of Trade Union Practices within Employing Entities

The Algerian legislator established general rules for the protection of trade union practices within employing entities pursuant to Law No. 23-02 relating to trade union activities. These rules are as follows:

- Legal protection is guaranteed to all workers who are members of trade union organizations, whether or not such organizations are representative¹.
- It is absolutely prohibited for the employer to impose any sanction on workers for reasons related to trade union activity or trade union affiliation.
- As a general rule, the employer is prohibited from changing the position of the trade union delegate or transferring them to another workplace; however, an exception is permitted where justified by legitimate operational necessity.
- The trade union organization alone is competent to deal with violations of a trade union nature, in accordance with the statutes and internal regulations of the trade union organization.
- As a general rule, there shall be no discrimination in disciplinary procedures between unionized and non-unionized workers in matters related to work.
- As a legal exception, there exists protective differentiation in disciplinary procedures relating to dismissal or unfair termination in favor of:

- Trade union delegates
- The authorized trade union representative of a non-representative trade union organization²
- Representatives elected directly by the body of workers for the purposes of collective bargaining and the prevention and settlement of collective labor disputes
- Members of the trade union council of the employing entity

This exception is embodied in the protection provided by Articles 132 and 137 of Law No. 23-02 relating to trade union activities. Under these provisions, where an employer decides to dismiss or remove a worker with trade union affiliation due to the commission of serious misconduct, the employer must, prior to initiating any such procedure, notify by registered letter with acknowledgment of receipt each of the following:

- The unionized worker concerned, for information
- The trade union organization to which the worker subject to dismissal or termination belongs, for information
- The territorially competent labor inspector, such notification constituting a formal referral for the initiation of an investigation into the matter

The employer must attach to the registered letter with acknowledgment of receipt the following:

- All documents evidencing the serious misconduct committed by the worker benefiting from the protection provided by Law No. 23-02 relating to trade union activities
- A detailed account of all facts justifying the dismissal or termination
- A detailed account of all circumstances surrounding the facts justifying the dismissal or termination

I.2. Limits Regulating Trade Union Practice Within Employing Entities

The Algerian legislator established regulations governing trade union practice within employing entities pursuant to Law No. 23-02 relating to trade union activities. Accordingly, the following individuals:

- Trade union delegates
- The authorized trade union representative of a non-representative trade union organization
- Representatives elected directly by the body of workers for the purposes of collective bargaining and the prevention and settlement of collective labor disputes
- Members of the trade union council of the employing entity

are subject to labor law, all rules governing operation and discipline within the employing entity, and Law No. 23-02 relating to trade union activities. They are therefore obliged to comply with all provisions and rules contained therein. In this regard, the following constitute infringements of freedom of work:

- Unlawful demands, such as:
 - Calls to cease work by unlawful means outside the framework of the law governing strikes
 - Calls to create collective disputes between workers and the employing entity
 - Calls to abstain from certain work-related activities in a manner that disrupts the activity of the employing entity
- All forms of threats, which constitute an infringement of freedom of work
- All forms of violence, such as insults and coercive maneuvering, which constitute an infringement of freedom of work

Anyone who commits such acts is not protected by trade union law and is subject to immediate disciplinary sanctions by the employer, as well as criminal prosecution.

II. Legal Protection of Trade Unionists against Employer's Disciplinary Authority

Through Law No. 23-02 relating to trade union activities, the Algerian legislator has conferred special protection on trade unionists against the employer's disciplinary authority, whether in the economic sector or within public institutions and bodies. The legislator has thus provided members of trade union organizations with various protective mechanisms and procedures to guard against abuses of authority involving violations of the provisions of Law No. 23-02, or the imposition of disciplinary sanctions that are disproportionate to the act committed by the trade unionist subject to discipline.

Accordingly, the legal protection afforded to trade unionists against the employer's disciplinary authority will be examined through the following subsection:

- II.1 Protection of civil servants and public agents in public institutions
- II.2 Protection of wage-earning workers in the economic sector

II.1. Protection of Civil Servants and Public Agents in Public Institutions

A trade unionist does work for the trade union organization they belong to while also doing their paid work for their administrative body. This is true no matter what their grade, position, or relationship with the administration (agent, contractual worker, or civil servant). While engaging in trade union activities, that person may face disciplinary action from the appointing authority. Administrative punishments can be as severe as the third or

fourth degree, or even firing someone from their job. These punishments may be based on work-related issues rather than trade union activity.

In these situations, the Algerian government has given special protection to trade unionists who work for the government through Law No. 23-02, which deals with trade union activity. This is to protect trade union freedom and to settle any disagreements that may arise between the government and civil servants, contract workers, or public agents. This protection is shown in both ways and means. This section will therefore talk about the following needs:

- Requirement One: Protective procedures for the trade unionist in relation to the administrative authority
- Requirement Two: Trade union procedures in relation to the administrative authority

II.1.1. Protective Procedures for Trade Unionist in Relation to Administrative Authority

It is rare for a relationship of cooperation to arise between the public employer and trade union organizations. In some instances, unlawful relationships of mutual interest may develop between the administrative authority of public administrations and employees affiliated with representative trade unions within those administrations, ultimately resulting in the loss of the rights of workers affiliated with the same union and adversely affecting their lawful freedoms guaranteed by the Constitution and by trade union and labor legislation. In other instances, strained relations may arise, transforming cooperation into hostility, with each party acting against the other in ways that negatively affect administrative development and public service delivery.

Given that, in such situations, the legislator views the trade unionist civil servant as the weaker party in comparison with the public employer, who holds numerous powers and may abuse them, such as through unlawful disciplinary sanctions, unlawful transfers, unlawful suspension from work, or unlawful dismissal, the Algerian legislator imposed, through certain mandatory provisions of Trade Union Law No. 23-02, protective procedures for the trade unionist civil servant in relation to the appointing authority represented by the public employer.

This will be examined through the following branches:

- **II.1.1.1** Protective procedures in relation to the appointing authority
- **II.1.1.2** Protective procedures relating to joint committees

II.1.1.1. Protective procedures in relation to the appointing authority

With the enactment of Law No. 23-02 on trade union activities, the Algerian legislator granted special protection to every trade union member belonging to any institution or public administration. This protection is manifested in distinguishing such individuals

from other civil servants or public agents in the field of disciplinary sanctions. Accordingly, no public administration may impose:

- A third-degree disciplinary sanction
- A fourth-degree disciplinary sanction
- Dismissal of a civil servant for abandonment of post
- Termination of the contract of a contractual agent

regardless of the rank or position of the trade union member within the administrative body, unless the appointing authority, depending on the case, first submits a reasoned notification addressed to:

- The joint administrative committee
- The joint consultative disciplinary committee

in order to obtain its prior binding opinion within a period of fifteen (15) days from the date of notification, pursuant to Articles 143 and 144 of Law No. 23-02. It is explicitly understood from Article 143, and not merely implicitly, that the decision or opinion issued by this committee concerning the trade union member subject to disciplinary proceedings is binding rather than consultative. In other words, it is binding upon the appointing authority, which may not, under any circumstances, issue a decision that contradicts it.

Whether the appointing authority within the administrative body decides to exonerate the trade union member concerned after receiving the decision of the joint committee, or decides to impose a third- or fourth-degree sanction, dismissal, or termination of contract, it is obliged to:

- Notify the trade union member concerned of the decision taken against him or her within eight (8) days from the date of signing the decision.
- Provide the trade union member concerned with a copy or extract of the decision of the joint committee, in order to verify the conformity of the decision of the appointing authority with that of the joint committee, as the legislator, in protection of trade union freedom, bound the appointing authority to the content of that committee's decision.
- Notify the trade union organization to which the trade union member belongs of the decision taken against him or her within eight (8) days from the date of signing the decision.

II.1.1.2. Protective procedures of the joint committees

After the appointing authority sends its reasoned notification concerning the trade union member subject to disciplinary proceedings to the joint committee, as the case may be:

- The joint administrative committee
- The joint consultative disciplinary committee

The latter undertakes the following procedures:

- Examination of the disciplinary file of the trade union member subject to sanction.
- Verification of the legality of the reasoning underlying the sanction set out in the notification of the appointing authority, particularly with regard to its proportionality to the act committed by the trade union member concerned, especially where the sanction may result in dismissal, removal from office, or termination of the employment contract.
- Summoning the trade union member concerned to appear before the joint committee at least eight (8)³ working days in advance. However, the legislator did not specify the entity responsible for sending the summons—whether it is the committee or the administration to which the individual belongs—nor did it clarify the procedures for such notification, whether through a judicial officer, postal service, telephone, or electronic means. This gap is noted in order to prevent the trade union member concerned from being unable to appear before the joint committee on the grounds of not having received any summons. On the other hand, it also aims to prevent any potential collusion between the committee and the appointing authority. Precision in such matters constitutes a path toward fairness and the construction of lawful institutions.

Given that referral to the joint committee arises solely due to trade union membership and the Algerian legislator's intent to protect trade union freedom, it would have been more appropriate to send a copy of the summons to the trade union organization to which the individual belongs, as it is better positioned to ensure the delegate's attendance and to strengthen the relationship between trade union organizations and administrations.

- Granting the trade union member subject to sanction access to his or her disciplinary file.
- Allowing the trade union member to submit written and oral observations regarding the grounds for the sanction advanced by the appointing authority. The legislator did not offer a choice between written or oral submissions but required both, unless the individual refuses, in which case such refusal is recorded in the minutes of the committee and forms part of the reasoning of the committee's decision.
- Allowing the trade union member subject to summons and sanction to be assisted by a person of his or her choosing. The legislator did not specify the affiliation of the defense representative, leaving the choice entirely to the trade union member, who is best placed to assess the persuasive capacity of the person selected.
- Ultimately, the joint committee deliberates on the sanction to be imposed on the trade union member and adopts its decision unanimously.
- Transmission of the committee's decision to the appointing authority of the administrative body to which the trade union member concerned belongs. The appointing authority is bound to comply with this decision as a matter of obligation, not merely consultation, before issuing its final decision.

II.1.2. Trade Union Procedures in Confronting Administrative Authority

The Algerian legislator, pursuant to Trade Union Law No. 23-02, also enabled a trade union member who has been subjected to an administrative sanction, as well as the trade union organization to which he belongs, to take all lawful means and procedures whenever it is deemed that an administrative injustice has occurred due to trade union affiliation. This will be examined through the following two branches:

- II.1.2.1 Measures taken by the trade union member subjected to administrative sanction
- II.1.2.2 Measures and procedures taken by the trade union organization

II.1.2.1. Measures Taken by Trade Union Member Subjected to Administrative Sanction

Where the appointing authority of the administrative entity, acting on the basis of the decision of the joint committee⁴, as the case may be, decides to sanction a trade union member administratively affiliated with it by imposing:

- A third-degree disciplinary sanction
- A fourth-degree disciplinary sanction
- Dismissal of a civil servant for abandonment of post
- Termination of contract for a contractual agent

And the person concerned considers such sanction to be arbitrary, on the grounds that its true or underlying reasons are related to:

- Trade union activity
- Trade union affiliation
- The trade union organization itself

the Algerian legislator, pursuant to Article 144 of Law No. 23-02, granted the administratively sanctioned trade union member the right to resort to other means to obtain his rights. These means consist of notifying the territorially competent labor inspector after exhausting all appeal and grievance procedures provided for under labor law. Pursuant to the final paragraph of Article 145 of Trade Union Law No. 23-02, the labor inspector shall then:

- Conduct an investigation based on the subject matter of the notification.
- Draw up an inspection report setting out the results of the investigation and deliver copies thereof to:
 - The trade union member concerned by the third- or fourth-degree sanction, dismissal, or termination
 - The appointing authority of the employing entity
 - The trade union organization to which the sanctioned member belongs

The trade union member concerned may also bring an action before the competent judiciary in the event that the public administration violates the provisions of Trade Union Law No. 23-02. Upon establishing the existence of such violation or violations, the competent court shall rule within a period of thirty (30) working days by a judgment enforceable immediately, notwithstanding any appeal, ordering:

- Annulment of the decision of dismissal, removal, or termination of the employment contract.
- Obligation upon the appointing authority to reinstate the trade union member concerned by dismissal, removal, or termination, in the same workplace and in the same position, or in another equivalent position with the same remuneration and compatible with his qualifications.
- Any delay in the enforcement of the judicial ruling ordering reinstatement shall give rise to a coercive fine imposed on the appointing authority, the amount of which shall not be less than the guaranteed minimum monthly wage for each day of delay in enforcement⁵, starting from the date on which the appointing authority is notified by a judicial officer.
- Compensation for the damage suffered by the trade union member as a result of the appointing authority's violation of the provisions of Law No. 23-02, which shall be mandatory rather than optional where the person concerned claims compensation for the material and moral damage sustained.

II.1.2.2. Measures and Procedures Taken by the Trade Union Organization

A trade union organization to which a unionized worker belongs may also bring a legal action before the competent court where the worker has been subjected to an unlawful disciplinary measure leading to dismissal, termination of contract, or the imposition of a third- or fourth-degree sanction⁶. This is particularly applicable in cases where the public administration has violated the provisions of Trade Union Law No. 23-02. Once the competent court has ascertained the existence of the legal violation or violations, it shall rule on the trade union organization's claim within thirty (30) working days by a judgment enforceable with immediate effect, notwithstanding any appeal, ordering:

- The annulment of the decision of dismissal, removal, or termination of the contractual relationship.
- The obligation of the appointing authority to reinstate the unionized worker concerned by the dismissal, removal, or termination, with reinstatement to the same workplace and the same position, or to another position equivalent in remuneration and compatible with the worker's qualifications.
- Any delay in the execution of the judicial decision relating to reinstatement shall result in a coercive fine imposed on the appointing authority, the amount of which shall not be less than the guaranteed minimum monthly wage for each day of delay

in executing the judgment⁷, calculated from the date on which the appointing authority is notified by a judicial officer.

- Compensation for the harm suffered by the unionized worker concerned and by the trade union organization to which they belong as a result of the appointing authority's violation of the provisions of Law No. 23-02, such compensation being mandatory rather than discretionary where claimed by the trade union organization.

II.2. Protection of Unionized Wage Workers in the Economic Sector

The Algerian legislator, through Trade Union Law No. 23-02 and labor law, also granted special protection to wage workers in the economic sector who are members of workers' trade unions. This will be examined through the following two requirements:

- II.2.1 Protection by the Labor Inspector for Unionized Wage Workers in the Economic Sector
- II.2.2 Protection under Labor Law for Unionized Wage Workers in the Economic Sector

II.2.1. Protection by Labor Inspector for Unionized Wage Workers in Economic Sector

The territorially competent labor inspector constitutes a pivotal link between the employer and workers, and between the employer and members of trade union organizations, in order to ensure the continuity of work, achieves economic development, and prevent labor disputes and strikes. Accordingly, the Algerian legislator, pursuant to Article 133 of Law No. 23-02, granted every unionized worker who has been subjected to injustice by the employer due to their trade union affiliation or activity the right to submit a written petition to the territorially competent labor inspector. Through this petition, the worker must substantiate their allegations with evidence and facts demonstrating the connection between the employer's decision concerning them and their trade union⁸ affiliation or activity; otherwise, the territorially competent labor inspector shall consider the petition to be legally unfounded.

Within this requirement, attention will be devoted to the following branches:

- II.2.1.1 The Decision of the Territorially Competent Labor Inspector on the Unionized Worker's Petition
- II.2.1.2 The Decision of the Labor Inspector on the Employer's Justification Letter for the Dismissal of the Unionized Worker
- II.2.1.3 Procedures for Investigating the Relationship between Dismissal and Trade Union Affiliation or Activity

II.2.1.1. The Decision of the Regionally Competent Labor Inspector on the Trade Union Worker's Petition

After receiving the petition submitted by the trade union worker, the regionally competent labor inspector verifies the substance of the claimant's allegations, particularly the relationship between the employer's decision and the worker's trade union activity or affiliation. The inspector ultimately reaches one of the two decisions provided for in Articles 133 to 144 of Law No. 23-02 relating to trade union activity. This will be addressed as follows:

- **II.2.1.1.1** The decision establishing the lack of grounds for the allegations of the aggrieved trade union worker
- **II.2.1.1.2** The decision establishing the validity of the allegations of the aggrieved trade union worker

II.2.1.1.1. The Decision Establishing the Lack of Grounds for the Allegations of the Aggrieved Trade Union Worker

- After the submission of a written petition by the trade union worker to the regionally competent labor inspector, through which the worker substantiates his allegations by means of evidence and facts linking the employer's decision concerning him to his trade union affiliation or activity, the inspector undertakes an investigation. This investigation may lead to the refutation of all evidence and allegations, ultimately resulting in a decision that the allegations of the aggrieved trade union worker are unfounded.
- The regionally competent labor inspector notifies, in writing, the decision establishing the lack of grounds for the allegations of the aggrieved trade union worker to:
 - The trade union worker concerned by the grievance petition;
 - The trade union organization to which the trade union worker concerned by the grievance petition belongs.

The legislator specified, in the second paragraph of Article 134, that the notification period is fifteen (15) working days from the date of the decision establishing the lack of grounds. However, the legal loophole here lies in the absence of any specification of the time limits for the investigation itself, namely the period extending from the date of submission of the written petition by the trade union worker to the regionally competent labor inspector until the date on which the latter determines the results of the investigation. This lack of specification may open wide the door to negative administrative bureaucracy.

II.2.1.1.2. The Decision Establishing the Validity of the Allegations of the Aggrieved Trade Union Worker

- After the submission of a written petition by the trade union worker to the regionally competent labor inspector, through which the worker substantiates his allegations by means of evidence and facts linking the employer's decision concerning him to his trade union affiliation or activity, the inspector undertakes an investigation that may lead to the confirmation of such evidence and allegations, ultimately resulting in a decision establishing the validity of the allegations of the aggrieved trade union worker.
- The regionally competent labor inspector issues a formal notice to the employer concerned by the unlawful decision taken against the aggrieved trade union worker, requiring the annulment of the unlawful decision within a period not exceeding eight (8) days.
- In the event that the employer concerned fails to comply with the decision of the regionally competent labor inspector and does not annul the unlawful decision within the eight-day period, the inspector proceeds to:
 - Draw up a report of violation against the employer;
 - Draw up a report of non-compliance with the formal notice, copies of which are delivered as follows:
 - One copy to the trade union worker concerned by the unlawful decision due to its connection with his trade union affiliation or activity;
 - One copy to the trade union organization to which the trade union worker concerned by the unlawful decision belongs.

The purpose of delivering these copies is to enable the trade union worker harmed by the employer's unlawful decision to resort to labor law by initiating individual dispute settlement procedures, pursuant to the second paragraph of Article 136 of Law No. 23-02 relating to trade union activities. Accordingly, and with reference to Article 135 of the same law, which allows a trade union worker in the economic sector who contests the decision of the regionally competent labor inspector establishing the lack of grounds for his petition—due to the absence or insufficiency of evidence or the lack of convincing probative value linking the employer's decision to trade union affiliation or activity—to resort to labor law through individual dispute settlement procedures.

It may be observed that the Algerian legislator, pursuant to the second paragraph of Article 136 of Law No. 23-02 relating to trade union activities, has erred from several perspectives:

- In this case, the legislator has put the employer's power above that of the regionally competent labor inspector, even though the latter's decision is based on an investigation into the trade union worker's claims of discriminatory behavior by the

employer, which is what the employer's decision was based on. The inspector only writes two reports: one about the employer breaking the law and the other about not following the formal notice. So, what is the point of a formal notice if the only thing that happens is a theoretical report? This is especially true if the person who was hurt only does this step.

- The legislator has equated substantiated allegations with unsubstantiated allegations made by trade union workers in their grievance petitions regarding the validity and lawfulness of the employer's decision, thereby equating true and legitimate allegations with false allegations. Ultimately, even the holder of a genuine claim may fail to obtain his right if the employer does not comply with the formal notice issued by the competent labor inspector, in which case the inspector merely records non-compliance.
- This equivalence negatively affects trade union activity, trade union affiliation, and trade union freedom in the workplace.
- The consequence of the employer's failure to comply with the formal notice of the regionally competent labor inspector should, more appropriately, be the consequence of non-compliance with decisions of the administration acting as an authority.
- It would have been more appropriate to open the way for fines or judicial proceedings in favor of the trade union worker harmed by the employer's unlawful decisions taken on a discriminatory basis linked to trade union activity or affiliation.

The two aspects for which the legislator may be excused regarding this shortcoming are:

- That it was intentionally adopted in order to preserve the economic fabric and economic development, insofar as the employer's discriminatory decision did not reach the level of dismissal from employment or termination of the employment contract; otherwise, deterrent measures would have been taken against the employer to dissuade him from a decision based on discrimination related to trade union affiliation or activity.
- The avoidance of premature recourse to judicial proceedings as long as other stages remain available under labor law, such as the stage of individual labor dispute settlement and the subsequent procedures that follow.

II.2.1.2. The labor inspector's decision regarding the employer's justification letter for the dismissal of a trade unionized worker

Pursuant to Articles 132 and 137 of Law No. 23-02 on trade union activities, an employer who has decided to dismiss or remove a worker with trade union affiliation on the grounds of the commission of a serious misconduct must, prior to initiating any such procedure, notify by registered letter with acknowledgment of receipt each of the following:

- The worker affiliated with a trade union, for information
- The trade union organization to which the worker concerned by the dismissal or removal procedures belongs, for information
- The territorially competent labor inspector, where such letter constitutes formal notification to the latter to initiate an investigation into the matter

The employer must attach to the registered letter with acknowledgment of receipt the following:

- All documents evidencing the serious misconduct committed by the worker benefiting from the protection afforded by Law No. 23-02 on trade union activities
- A detailed account of all facts justifying the dismissal or removal
- A detailed description of all circumstances surrounding the facts justifying the dismissal or removal

II.2.1.3. Procedures for investigating the relationship between dismissal and trade union affiliation or activity

Pursuant to Article 138 of Law No. 23-02 on trade union activities, the territorially competent labor inspector conducts an investigation into the dismissal or removal within a period of eight (8) days, starting from the first working day following notification by registered letter. On the basis of this investigation, the attached documents, and on-site inquiries, the inspector reaches one of the following determinations:

- A decision stating that the justification for dismissal is of a purely professional nature; or
- A decision establishing a link between the professional dismissal and trade union affiliation or activity.

In the event that the labor inspector determines the existence of a link between the professional dismissal and trade union affiliation or activity, the territorially competent labor inspector issues a formal notice to the employer concerned within eight (8) working days from the date of notification of such notice, requiring the employer to:

- Revoke the decision to dismiss the protected worker
- Reinstate the protected worker in his or her position
- Restore all rights of the protected worker

A copy of the same formal notice is delivered to:

- The protected worker
- The trade union organization to which the worker belongs

Pursuant to Article 140 of Law No. 23-02 on trade union activities, if the employer concerned fails to comply with the formal notice issued by the territorially competent labor

inspector within the prescribed eight (8) days by revoking the dismissal decision and reinstating the protected worker, the inspector shall:

- Draw up a report of violation against the employer
- Draw up a report of non-compliance with the formal notice, copies of which shall be delivered as follows:
 - One copy to the trade unionized worker concerned by the unlawful decision linked to his or her trade union affiliation or activity, within a period not exceeding three (3) working days from the date of preparation of the report, for use before the competent court
 - One copy to the trade union organization to which the trade unionized worker concerned by the unlawful decision belongs, within a period not exceeding three (3) working days from the date of preparation of the report, for use before the competent court

The reason for giving these copies is to let the trade unionized worker who was hurt by the employer's illegal decision, which was to fire them, go to the labor court for help. The trade union organization that the workers belong to can also take the same action because it has the right to protect its members, defend their rights, and represent them in court.

But according to Article 141 of Law No. 23-02 about trade union activities, the Algerian government says that a worker who was fired in violation of this law must try all other ways to settle the dispute before going to court. These include the procedures for preventing and settling individual disputes that are set out in labor law and in the founding document of the workers' trade union organization to which the worker belongs.

This implicitly indicates a connection between trade union law and labor law, which benefits the internal stability of economic institutions. This is shown by the fact that all available ways to settle a dispute should be used before going to court. If a protected worker who has been fired or the trade union organization they belong to takes legal action against the employer for breaking Trade Union Law No. 23-02, which protects workers from being fired because of their union membership or activity, the court will decide within thirty (30) working days and issue a judgment that is immediately enforceable, even if there is an appeal:

- Annulment of the decision of dismissal or termination of the employment contract.
- Obligation upon the employer to reinstate the protected worker concerned by the dismissal or termination, in the same workplace and in the same position, or in another position with equivalent remuneration and compatible with his qualifications.
- Any delay in the enforcement of the judicial ruling ordering reinstatement shall give rise to a coercive fine imposed on the employer, the amount of which shall not be less than the guaranteed minimum monthly wage for each day of delay in

enforcement⁹, starting from the date on which the employer is notified by a judicial officer.

- Retention of all acquired benefits as of the date of dismissal from employment, in particular entitlement to financial compensation not less than the remuneration, or the remaining unpaid portion thereof, due from the employer for the entire period during which the employment relationship was suspended until the date of effective reinstatement.

The Algerian legislator did not, in Articles 141 and 142, refer to compensation for the damage suffered by the protected salaried worker as a result of the employer's violation of the provisions of Law No. 23-02, in contrast to the express reference made in respect of civil servants, contractual employees of administrative institutions, or administrative agents. This omission may be considered an oversight; nevertheless, the right of the protected worker in the economic sector to claim compensation remains intact in the event that he seeks redress for the material and moral damage suffered as a result of the employer's breach of legal provisions.

II.2.2. Protection Afforded by Labor Law to Unionized Salaried Workers in the Economic Sector

Pursuant to Article 135 of Law No. 23-02 relating to trade union activities, a unionized salaried worker in the economic sector who contests the decision of the territorially competent labor inspector refusing to register his complaint, due to the absence, insufficiency, or lack of persuasive evidentiary value of proof establishing a link between the employer's decision and trade union affiliation or activity, may have recourse to labor law by resorting to individual dispute settlement procedures.

III. Penal Provisions Regulating Trade Union Activity

The Algerian legislator enacted a set of penal provisions addressing certain violations committed in breach of the mandatory rules of Law No. 23-02 relating to trade union activity. These violations are recorded by labor inspectors. Through an analysis of these punitive provisions, they may be classified as follows:

- III.1 Sanctions Contributing to the Protection of Freedom of Trade Union Activity
- III.2 Sanctions Contributing to the Regulation of Trade Union Activity

III.1. Sanctions Contributing to the Protection of Freedom of Trade Union Activity

Sanctions contributing to the protection of freedom of trade union activity are, for the most part, directed against the stronger party, namely the employer, whether in the public or private sector. This is because freedom of trade union activity is negatively affected by the practices of employers against trade union organizations, trade union branches, or trade union delegates.

Most of the sanctions contributing to the protection of freedom of trade union activity are embodied in five penalties:

First: Pursuant to Article 149 of this law, the legislator imposed a fine ranging from 100,000 to 200,000 Algerian dinars on anyone who commits the following acts:

- Interference in the management of a representative trade union organization by any act that undermines its independence.
- Combining the exercise of a trade union mandate with a mandate within the leadership bodies of a political party.
- Causing harm to a worker due to their trade union affiliation or activity, particularly in relation to:
 - Recruitment
 - Promotion
 - Transfer
 - Vocational training
 - Social benefits
 - Disciplinary procedures

The penalty is doubled in the event of recidivism.

Second: A fine ranging from 50,000 to 100,000 Algerian dinars is imposed on anyone who obstructs trade union freedom or the right to exercise trade union activity. In the event of recidivism, the offender is punished by imprisonment from thirty (30) days to six (6) months and a fine ranging from 100,000 to 200,000 Algerian dinars, or by one of these penalties, pursuant to Article 153 of Law No. 23-02 relating to trade union activity.

Third: Pursuant to Article 158 of Law No. 23-02 relating to trade union activity, a fine ranging from 100,000 to 200,000 Algerian dinars is imposed on anyone who obstructs the exercise of the trade union right through:

- Discriminatory practices
- Pressure
- Threats
- Any conduct hostile to the trade union organization

In the event of recidivism, the penalty is doubled.

Fourth: Pursuant to Article 156 of Law No. 23-02 relating to trade union activity, the legislator imposed a penalty of imprisonment from three (3) months to six (6) months and a fine ranging from 50,000 to 100,000 Algerian dinars on any person who obstructs the establishment or functioning of the leadership or administrative bodies of a trade union organization. In the event of recidivism, the penalty is doubled.

Fifth: Pursuant to Article 157 of Law No. 23-02 relating to trade union activity, the legislator imposed a fine ranging from 50,000 to 100,000 Algerian dinars on any employer who deducts trade union contributions from workers' wages in order to pay them to the trade union organization to which they belong. In the event of recidivism, the penalty is doubled.

III.2. Sanctions Contributing to the Regulation of Trade Union Activity

As for the sanctions contributing to the regulation of trade union activity, the Algerian legislator provided for them under Law No. 23-02 relating to trade union activities, with the aim of regulating conduct that poses a significant risk to the economy, public security, or public order.

Most of these sanctions contributing to the regulation of trade union activity are embodied in five penalties:

First: Pursuant to Article 150 of the same law, the legislator imposed a fine ranging from twenty thousand (20,000) to fifty thousand (50,000) dinars for any affiliation with international, continental, or regional trade union organizations without notifying the competent administrative authorities within the time limits specified in Law No. 23-02.

Second: Imprisonment from three (3) months to six (6) months and a fine ranging from fifty thousand (50,000) to one hundred thousand (100,000) dinars, or either of these penalties, for any person who uses the revenues of the organization to achieve purposes contrary to the objectives of the trade union organization¹⁰, pursuant to Article 151 of the same Law No. 23-02.

Third: Imprisonment from six (6) months to one (1) year and a fine ranging from one hundred thousand (100,000) dinars to two hundred thousand (200,000) dinars in the event of accepting donations or bequests from foreign trade union organizations or bodies without prior approval from the competent administrative authorities, pursuant to Article 152 of the same Law No. 23-02.

Fourth: Pursuant to Article 155 of the same Law No. 23-02, the legislator imposed a penalty of imprisonment from three (3) months to six (6) months and a fine ranging from twenty thousand (20,000) to fifty thousand (50,000) dinars, or either of these penalties, on anyone who obstructs the enforcement of a judicial ruling¹¹ relating to:

- The suspension or freezing of the activity of a trade union organization;
- The dissolution of a trade union organization.

Fifth: Anyone who continues or contributes to the holding of meetings of a trade union organization that is subject to suspension or dissolution pursuant to a judicial ruling is subject, under Article 154 of the same Law No. 23-02, to imprisonment from three (3) months to six (6) months and a fine ranging from twenty thousand (20,000) to one hundred thousand (100,000) dinars, or either of these penalties.

IV. Constraints On Trade Union Freedom

The Algerian government added fifteen articles to Law No. 23-02¹², which deals with trade union organization. These articles say that trade union freedom is protected by the Constitution in a way that doesn't allow for violations, delays in the formation of trade union entities, or interference with their freedom of activity. It is okay to interfere with trade union activities in different ways as long as those activities are not against the law in Algeria or the laws that govern trade union organization.

Article 69 of the Algerian Constitution of 2020 guarantees the right of workers and employers to join a union. According to Article 34 of the same Constitution, the constitutional legislator says that freedoms and rights can only be limited or taken away if there is a legal reason for it¹³, such as:

- ❖ The preservation of public security;
- ❖ The preservation of public order;
- ❖ The protection of national territorial integrity;
- ❖ The protection of the unity of the people and the unity of the nation;
- ❖ The preservation and protection of the constants of national identity¹⁴.

The constitutional legislator also set out the overall objectives sought through the protection of the fundamental rights and freedoms of citizens in Article 35 of the 2020 Constitution, which provides for the removal of all factual, legislative, regulatory, and bureaucratic obstacles in order to achieve¹⁵:

- Equality among all citizens;
- The openness of the Algerian citizen;
- The participation and inclusiveness of the citizen in political life;
- The participation and inclusiveness of the citizen in economic life;
- The participation and inclusiveness of the citizen in social life;
- The participation and inclusiveness of the citizen in cultural life.

Accordingly, within this chapter, attention will be devoted to the following subsections:

- IV.1 The legal freedoms granted to trade union organizations;
- IV.2 Unlawful activities under trade union law;
- IV.3 The legal termination of the activity of a trade union organization.

IV.1. Legal freedoms granted to trade union organizations

The legal freedoms granted to trade union organizations may be derived from the Algerian Constitution of 2020 and from the legal amendment governing trade union organization No. 23-02. These freedoms are essentially embodied in the following:

- Freedom to establish a trade union organization, regardless of its nature, pursuant to the legal amendment governing trade union organization No. 23-02¹⁶, is guaranteed

to all persons, except where expressly excluded by a specific legal provision for the necessity of protecting security, national territorial unity, and the preservation of public order.

- Freedom to join trade union organizations.
- Freedom to withdraw from trade union organizations.
- Freedom to stand for elective positions within trade union organizations.
- Freedom of activity of trade union organizations, insofar as such activity does not contravene the 2020 Constitution or the legal amendment governing trade union organization No. 23-02. Accordingly, as a general rule, no person is permitted to interfere in the activities of trade union organizations pursuant to Article 8 of the legal amendment governing trade union organization No. 23-02.
- Freedom to enact and amend the statutes of any trade union organization in a manner that serves its objectives and does not conflict with the 2020 Constitution or the legal amendment governing trade union organization No. 23-02.
- Freedom to engage in cultural and economic activities, pursuant to the second paragraph of Article 15 of the legal amendment governing trade union organization No. 23-02, as a general rule¹⁷.
- Freedom of individual members of trade union organizations to join political parties, as indicated by the legislator at the end of the second paragraph of Article 12 of the legal amendment governing trade union organization No. 23-02, as a general rule.

Article 9 of the legal amendment governing trade union organization No. 23-02 was passed by the legislator to make sure that work runs smoothly, that people can do what they want, and that people can express their opinions within trade union organizations. This article says that no member can hold two leadership positions at the same time, one in a trade union organization in a given administration and the other in the same administration, because of incompatibility and conflict of interest.

It is against the law for an employer to punish trade union members in any way, either directly or indirectly, for exercising their rights and freedoms within the institution. This includes, among other things, pay, vacation time, hiring, promotions, training, moving around, transfers, stipends, internships, and all kinds of benefits. Article 10 of the legal amendment governing trade union organization No. 23-02 says that any disciplinary action related to trade union activity is also not allowed.

Also, it is against the law for an employer or a leader in an organization to make any threats, either directly or indirectly, against union members in order to stop or block union activity. Article 11 of the legal amendment governing trade union organization No. 23-02 says that this is okay. In these situations, people who feel threatened or hurt can use all the legal options available to them under labor law, individual and collective labor

agreements, and the institution's own rules. These options range from filing a complaint to going on limited strikes and even open-ended strikes. They can also take their case to the right court.

IV.2. Unlawful Activities under Trade Union Law

Criminal legality in Algerian legislation is based on the principle that there is no crime, no punishment, and no security measures except by virtue of a legal provision. From this perspective, the trade union legislator, through Law No. 23-02, identified the unlawful activities of trade union organizations and of the members of such organizations by means of mandatory legal rules. Moreover, in order to preclude any claim of ignorance, the legislator required the leadership of these organizations to incorporate such unlawful activities into their constituent statutes. Within this chapter, these issues will be addressed through the following requirements:

- IV.2.1 Unlawful activities of trade union organizations
- IV.2.2 Unlawful activities of members of trade union organizations
- IV.2.3 Mandatory inclusion of unlawful activities

IV.2.1. Unlawful Activities of Trade Union Organizations

Unlawful activities of trade union organizations may be inferred from the Algerian Constitution of 2020 and from the legislative amendment to trade union organization under Law No. 23-02, particularly from the content of Articles 12, 13, 14, and 15. From these provisions, the following may be derived:

- The illegality of trade union organizations engaging in political activities, where the penalty for such practice may reach the dissolution of the trade union organization.
- The prohibition on the trade union organization's explicit or implicit¹⁸ affiliation with any political party, association, or grouping holding political views or objectives, whether within or outside the country.
- The prohibition on the trade union organization's explicit or implicit affiliation with any pressure group or association, whether within or outside the country.
- The prohibition on the trade union organization's receipt of any financial support or privilege from political parties or political organizations, regardless of the motive¹⁹.
- The prohibition on any explicit or implicit association between the name of the trade union organization and the names of political parties or associations²⁰.
- The prohibition on any explicit or implicit linkage between the activities of the trade union organization and the activities of political parties or associations²¹.
- The prohibition on any explicit or implicit linkage between the objectives of the trade union organization and the objectives of political parties or associations²².

IV.2.2. Unlawful Activities of Members of Trade Union Organizations

Even though the Algerian government had strict rules about how trade unions and political parties could work together, members of trade unions were not subject to these rules. In general, they are allowed to be members of both a political party and a trade union. The end of the second paragraph of Article 12 of Law No. 23-02's amendment to trade union organization makes it clear that trade union members are free to join political parties. But there is an exception for people who hold both a leadership position in a trade union and a leadership position in a political party.

Because of the sensitive nature of their roles, such as founding members and leaders²³, the Algerian government put certain trade union members under a set of rules. According to the 2020 Constitution and the legislative change to trade union organization under Law No. 23-02, the Algerian government made the following requirements for founding or leadership members of trade union organizations:

- The obligation of founding and leadership members to maintain neutrality with regard to the political orientations of natural persons, regardless of their orientation or objectives, on all occasions, particularly during electoral events.
- The obligation of founding and leadership members to maintain neutrality with regard to the political orientations of political parties, regardless of their orientation or objectives, on all occasions, particularly during electoral events.
- The prohibition on combining a leadership mandate within a political party with a leadership mandate within a trade union organization. This prohibition is intended to prevent negative influence on the trade union organization, which could otherwise be diverted to serve political party programs and objectives, and to prevent adverse effects on the protection and defense of the rights of the organization's members, which could create an atmosphere of hostility and animosity detrimental to institutional activity.

IV.2.3. Mandatory Inclusion of Unlawful Activities

In order to prevent certain individuals²⁴—particularly those with a limited level of education—from invoking ignorance of trade union law, the Algerian legislator provided, through the first and second paragraphs of Article 15 of the amended Trade Union Law No. 23-02, for the mandatory codification of unlawful activities committed by members of trade union organizations as natural persons, as well as by the trade union organization as a legal person, within the following instruments:

- The statutes of the organization
- The code of ethics of the organization
- The internal regulations of the organization

Members of the leadership of trade union organizations may further reinforce the discharge of their civil or criminal liability for any unlawful activities by issuing

awareness-raising notices and publications as a preliminary measure prior to initiating disciplinary procedures pursuant to the organization's code of ethics, which is generally provided for in the statutes of the trade union organization.

IV.3. Legal Termination of the Activity of the Trade Union Organization

The legislative authority passed Trade Union Law No. 23-02, which was published in Official Gazette No. 19 on May 2, 2023. The goal of this law is to regulate all trade union activities in order to keep public order. The executive branch, on the other hand, makes sure that this law is carried out legally and without breaking any of its mandatory rules, also in the interest of public order. However, the leadership of workers' or employers' trade unions may act in ways that break the law and go against the rules of this law, which could put the employer at risk of service delivery or production problems and possibly even disrupt public order. In these situations, the judicial authority steps in to fix the problem with public order, which could mean putting the trade union organization on hold or even shutting it down. The following two requirements will take care of this:

- **IV.3.1** Suspension of the Activity of the Trade Union Organization
- **IV.3.2** Dissolution of the Trade Union Organization

IV.3.1. Suspension of the Activity of the Trade Union Organization

Through Trade Union Law No. 23-02, the Algerian government made it clear that all trade union activities, whether formal or informal²⁵, are free and independent. So, even before they are set up, trade union groups are connected to the courts because the list of founding members is kept in a register stamped and certified by the right court. Furthermore, even if a trade union organization does something that goes against the Constitution or the trade union law mentioned above, no government body has the power to stop it from doing its work. The organization that gave it accreditation can't even stop it from doing business. At first, the administration only has the power to send a formal notice telling the organization to stop doing anything illegal. If the organization doesn't stop doing what it's doing or fix the problems that were reported within the time limit, the administration will file a reasoned action with the appropriate judicial authorities asking for the organization's activities to be stopped²⁶.

As stated in the second paragraph of Article 63, the judicial authority must make a decision on the suspension action that is immediately enforceable, regardless of whether or not there is an appeal. The judicial ruling on suspension may lead to either the acceptance or rejection of the request; in both scenarios, the competent judge delivers an enforceable judgment, regardless of the reasons presented by the challenging party, whether it be the relevant administration or the trade union organization facing suspension.

The cases specified by the Algerian legislator that justify the suspension of the activity of a trade union organization are as follows:

- Engaging in activities other than those provided for in Trade Union Law No. 23-02.

- Engaging in activities other than those provided for in the organization's statutes.
- Failure to comply with the legislative provisions of Trade Union Law No. 23-02.
- Failure to comply with the regulatory provisions²⁷ forming part of the trade union legal framework.
- Failure to comply with the provisions set out in the organization's statutes.
- Failure to comply with the provisions set out in the organization's internal regulations.
- Failure to request prior authorizations from the competent administrative authorities.
- Failure to notify the competent administrative authorities²⁸ of amendments to the organization's statutes.
- Failure to notify the competent administrative authorities of amendments to the organization's internal regulations.

The Algerian legislator did not provide, under Trade Union Law No. 23-01, for the possibility of initiating public criminal proceedings with regard to the suspension of the activity of trade union organizations as legal persons.

IV.3.2. Dissolution of the Trade Union Organization

The dissolution of a trade union organization signifies the termination of its legal personality, by virtue of which its leadership had represented it before employing bodies, the competent administrative authorities, judicial bodies, and other entities at both the national and international levels. Some legal doctrine holds that its name continues to subsist after dissolution until the final liquidation of its financial resources, both movable and immovable. In view of the multiplicity of grounds for dissolution, this section will be examined through the following branches:

- IV.3.2.1 The concept of dissolving a trade union organization
- IV.3.2.2 Grounds for judicial dissolution of a trade union organization
- IV.3.2.3 Grounds for non-judicial dissolution of a trade union organization
- IV.3.2.4 Consequences relating to the devolution of the assets of the dissolved trade union organization

IV.3.2.1. the Concept of Dissolving a Trade Union Organization

The dissolution of a trade union organization constitutes a suspensive measure affecting all its activities, acts, affiliations, representations, powers, and all its former attributes. Nothing remains thereof except the continued use of its name until the completion of the liquidation of its financial estate, both movable and immovable. This measure may be voluntary, by the will of its members, or compulsory, through the intervention of the

judicial authority as a general rule, or exceptionally through the intervention of the administrative authority.

IV.3.2.2. Grounds for Judicial Dissolution of a Trade Union Organization

Pursuant to Articles 64 and 65 of Law No. 23-02 relating to trade union activity, a trade union organization may be dissolved either voluntarily or judicially. Voluntary dissolution is carried out in accordance with the substantive and procedural rules governing dissolution as set forth in the organization's basic statute. Judicial dissolution, on the other hand, is effected through an action brought by the competent administrative authorities where the trade union organization subject to dissolution has engaged in any of the following acts:

- Violation of the objectives established for the creation of trade unions as set forth in Law No. 23-02 relating to trade union activity;
- Violation of the provisions of Law No. 23-02 governing the relationship between the organization and political parties²⁹;
- Failure of the trade union organization to engage in any effective activity related to the objectives of its establishment for a period of three (3) years;
- Incitement to violence;
- Engagement in threats;
- Any unlawful act accompanied by a violation or attempted violation of workers' rights;
- Refusal to comply with judicial authorities;
- Refusal to enforce judicial rulings³⁰;
- Unlawful strike, particularly where it is detrimental to the functioning or continuity of public service;
- Repetition of the same violations that were the subject of a judicial ruling suspending the activity of the trade union organization;
- Acceptance of unlawful donations or bequests³¹;
- Any violation constituting a threat to public order.

The Algerian legislator did not require the relevant administrative authorities to give a trade union organization that committed any of the above-mentioned acts a reasoned prior warning before starting legal action in the appropriate courts to decide whether or not to dissolve the organization. Instead, they were free to choose whether or not to do this³². This method might change how fairly existing trade union groups are treated in the future. It would have been better to require the trade union organization that was about to be dissolved to get a reasoned warning and to give it a certain amount of time before going to court, just like the law says should happen when trade union activities are suspended or frozen for two years.

In cases where someone wants a trade union to be dissolved, the right court must also rule on the request for suspension by issuing a judgment that can be enforced right away, no matter what happens with the appeal. The last paragraph of Article 65 says this. A judge's decision on suspension can either be accepted or rejected. In either case, the judge's decision is final and cannot be appealed, no matter what the challenging party (the competent administration or the trade union organization that is about to be dissolved) says. As stated in the last paragraph of Article 66, judicial authorities may also order any precautionary measure while they wait for a final decision on the dissolution of the trade union organization in question.

IV.3.2.3. Non-judicial grounds for the dissolution of a trade union organization

A trade union organization may be dissolved through non-judicial procedures, such as:

- Voluntary dissolution of the trade union organization, by agreement of its members and following approval by its general assembly pursuant to Article 64 of Trade Union Law No. 23-02. The procedures for dissolution are carried out in accordance with the provisions set out in the union's statutes.
- Legal dissolution of the trade union organization where so required by its statutes³³, such as trade unions established for a limited duration under their statutes. Upon the expiry of such duration, the trade union is dissolved, unless its statutes are lawfully amended prior to the expiry of that period in accordance with the provisions of Trade Union Law No. 23-02.
- Administrative dissolution of the trade union organization as permitted by the Constitution in exceptional circumstances, such as in a state of war.

IV.3.2.4. Consequences Relating to Devolution of the Assets of the Dissolved Trade Union Organization

Article 67 of Trade Union Law No. 23-02 says that the general rule for how the assets of a dissolved trade union organization should be divided up is that they must follow the rules set out in the statutes that were approved by the union's general assembly and recognized by the appropriate administrative authorities³⁴. This rule does not apply if the courts decide otherwise in a reasoned decision.

In general, the assets of a trade union that has been dissolved cannot be given to its members in any way. However, as an exception, members who put money³⁵ into the trade union's real estate assets can ask for that money back in the same condition that the property or properties belonging to the union are in. The second paragraph of Article 67 of Trade Union Law No. 23-02 says this.

Conclusion

Through this research, which examines the legal frameworks for the protection of trade union workers in both the public and private sectors under Algerian Law No. 23-02 on the

exercise of the right to trade union activity, promulgated on 2 May 2023, it may be inferred that the Algerian legislator sought to strike a balance between two parties—namely, the administration and the trade unionist. To this end, the legislator afforded the unionized worker effective protection against the employer's abuse of authority in particular, and against administrative arbitrariness more generally, in both the public and private sectors, while simultaneously preventing the exploitation of trade union status in a manner that would undermine order and workplace discipline within institutions across both sectors.

Among the most significant fundamental guarantees afforded by the Algerian legislator to trade unionists are the following:

- Protection extends to all workers affiliated with trade union organizations, regardless of whether the union is “representative.”
- The employer is subject to an absolute prohibition against imposing any sanction on a worker on grounds related to trade union activity or trade union membership.
- As a general rule, the transfer of a trade union delegate or any change in his or her position is prohibited, subject to an exception where justified by a legitimate operational necessity.
- No discrimination may be made, in all matters relating to work, between unionized and non-unionized workers in disciplinary procedures.
- Enhanced procedural safeguards apply where the employment relationship is affected (particularly in cases of dismissal or termination), in favor of specific categories such as trade union delegates, the representative of a non-representative trade union, collective bargaining representatives, and members of the union council within the employing entity.

Conversely, the legislator also imposed constraints on trade unionists which may give rise to punitive measures where they engage in certain conduct, including:

- Calling for a work stoppage through unlawful means outside the legal framework governing strikes;
- Manufacturing collective disputes or obstructing the activity of the employing entity;
- Resorting to threats, violence, coercion, or insults.

Even where a trade unionist is subjected to disciplinary action within the public service, the legislator considers the unionist to be the weaker party vis-à-vis the administration. Accordingly, public authorities are prohibited from imposing severe sanctions—such as removal from office or termination of contract—unless they first submit a reasoned notification to a joint committee (administrative/disciplinary) and obtain its prior binding opinion within a period of fifteen (15) days. The administration is further obliged to notify both the individual concerned and the relevant trade union organization of the decision within eight (8) days, and to provide the trade unionist with a copy or extract of the

committee's decision in order to verify compliance with its binding nature. Where the trade unionist considers the sanction to be arbitrary on grounds related to his or her trade union membership or activity, he or she may notify the labor inspector or seek judicial recourse. In such cases, the competent court may, by an immediately enforceable judgment, annul the sanction and award compensation for both material and moral damage. The legislator likewise recognizes that the right to bring legal proceedings is also vested in the trade union organization itself.

In the economic sector, the legislator assigns the labor inspector a pivotal role in mediating between the worker and the employer. The inspector may issue a formal notice requiring the employer to revoke any unlawful decision within eight (8) days; failing compliance, recourse to the judiciary becomes available. The court is required to rule within thirty (30) working days, ordering annulment and reinstatement, and imposing a coercive fine, while confirming the worker's entitlement to retain the financial rights accrued during the period in which the employment relationship was suspended.

In the field of penal provisions governing trade union activity, the legislator has, on the one hand, imposed sanctions on employers in order to protect the freedom of trade union activity, safeguard its independence, and curb discrimination against workers on the grounds of their union involvement. On the other hand, disciplinary measures have been established against trade unionists where their conduct endangers public order. On this basis, trade union organizations are prohibited from engaging in political activity. Moreover, under no circumstances may the administration suspend the activity of any trade union organization; rather, it may only issue a prior warning and subsequently institute judicial proceedings. Where the judiciary orders dissolution, the assets of the trade union organization are liquidated in accordance with its statutes and by decision of the general assembly.

Notes

1. According to the Algerian legislator, pursuant to Law No. 23-02 relating to trade union activities, and with regard to the types of trade union organizations based on their membership rate, there are three types:

- Non-representative trade union organizations
- Representative trade union organizations
- Highly representative trade union organizations

2. Representative trade union organizations have trade union delegates, whereas non-representative organizations have trade union representatives.

3. What is meant by working days is the exclusion of weekends and official public holidays from the eight-day period specified for the summons.

4. These committees consist of:

- The Joint Administrative Committee

- The Joint Advisory Disciplinary Committee
- 5. The last paragraph of Article 146 of Trade Union Law No. 23-02.
- 6. Ibid.
- 7. The last paragraph of Article 146 of Trade Union Law No. 23-02.
- 8. Regardless of the content of the decision, if its apparent or implicit reason is trade union membership or trade union activity, including the following:
 - Transfer from the position of employment
 - Imposition of a disciplinary sanction of a lower grade
 - Termination of the employment contract
 - Conversion of an open-ended employment contract into a fixed-term contract
- 9. The last paragraph of Article 146 of Trade Union Law No. 23-02.
- 10. These objectives are set out in:
 - Law No. 23-02 relating to trade union activity
 - The statutes of the trade union organization
 - The internal regulations of the trade union organization
- 11. This judicial ruling is subject to immediate enforcement.
- 12. From Article 5 to Article 11.
- 13. An example of this is the entirety of the legal texts governing the Ministry of National Defense in the field of rights and freedoms, which restrict certain rights and freedoms that are otherwise unrestricted in all legal codes regulating other ministerial sectors. Such restrictions are imposed for the purpose of protecting territorial integrity, national unity, and the preservation of security and public order.
- 14. Among these constants are: the nature of the system of governance, the language, and the religion.
- 15. Article 37 of the 2020 Constitution stipulates the rejection of all forms of discrimination in the field of rights and freedoms, and the constitutional legislator provided examples of such discrimination, including birth, race, sex, opinion, or any other personal or social condition or circumstance.
- 16. Types of trade union organizations according to the legal amendment to Trade Union Law No. 23-02:
 - A basic (grassroots) trade union organization
 - A federation
 - A confederation
 - A representative trade union organization
 - A trade union branch

17. As an exception, if the cultural or economic field has a political orientation or is linked to pressure groups, engagement and interaction with it are prohibited.

18. What is meant here by the Algerian legislator is the prohibition of two types of affiliation:

- Structural affiliation, whereby the trade union organization becomes an integral part of a political party.
- Functional affiliation, whereby the trade union organization becomes a tool exploited by a political party to achieve its objectives, which constitutes a threat to the stability of public and private institutions.

19. To avoid any type of future affiliations with political orientations or those that may negatively affect the functioning of economic, social, and cultural institutions.

20. This is as provided by the Algerian legislator in Article 12 of the legal amendment to Trade Union Law No. 23-02.

21. Ibid.

22. Ibid.

23. It is natural that the founding members initially occupy the leadership positions of the trade union organization, as they are the originators of the idea to establish the organization, the drafters of its statutes and internal regulations, and the supervisors of all preliminary procedures for obtaining accreditation for the trade union organization. However, as of the second electoral term and those that follow, the natural persons holding leadership positions change, particularly the president of the organization, who, under the legal amendment to Trade Union Law No. 23-02, is permitted only two electoral terms. Over successive terms, the founding members do not remain in place, and the leadership members of the same organization change.

Founding members nevertheless retain a degree of power and influence within the trade union organization. Although this influence differs from that of the leadership members, its nature is stronger. This is a factor that the Algerian legislator took into consideration in numerous provisions included in the legal amendment to Trade Union Law No. 23-02.

24. In fact, ignorance of the law is no excuse. This does not mean that individuals are required to be familiar with all legal codes; rather, they are only required to acquaint themselves with, and consequently bear responsibility for, the legal framework governing the field they enter. Thus, ignorance of traffic law is excused only for those who do not drive a vehicle, and ignorance of commercial law is excused only for those who do not engage in commercial activity. By the same reasoning, ignorance of trade union law is not excused for those who practice trade union activity.

25. Whether non-representative, representative, or most representative, and whether regional or national.

26. Articles 62 and 63 of Law No. 23-02 relating to trade union activity.

27. Regulation is subordinate legislation issued by the regulatory authority (the President of the Republic, the Prime Minister, or ministers), and it is generally considered to consist of legal texts implementing primary legislation, such as presidential decrees, executive decrees, and ministerial decisions. The latter do not contain provisions not stipulated in the primary legislation, nor are they submitted to Parliament in its capacity as the legislative authority.

28. These authorities vary according to the nature of the trade union organization. For example, the competent administrative authority with regard to provincial or municipal trade union organizations is the province, whereas with regard to national or inter-provincial trade union organizations, it is the Ministry of Labor.

29. These provisions are as follows:

- The illegality of a trade union organization engaging in political activities, as the penalty for such practice may extend to the dissolution of the trade union organization.
- The explicit or implicit non-affiliation of the trade union organization with any political party, association, or grouping holding political views or objectives, whether within or outside the country.
- The explicit or implicit non-affiliation of the trade union organization with any pressure group or association, whether within or outside the country.
- The prohibition on the trade union organization from receiving any financial support or advantage from political parties or political organizations, regardless of the reason.
- The explicit or implicit non-association of the trade union organization's name with the names of political associations or parties.
- The explicit or implicit non-association of the trade union organization's activities with the activities of political associations or parties.
- The explicit or implicit non-association of the trade union organization's objectives with the objectives of political associations or parties.

30. Such as continuing trade union activity despite the issuance of a judicial ruling enforceable by law ordering the suspension of the trade union organization's activity for a period of two years.

31. Its illegality due to its violation of the provisions set forth in Trade Union Law No. 23-02, as well as the provisions contained in the statutes and internal regulations approved at the constituent general assembly.

32. Article 65 of Law No. 23-02 relating to trade union activity: “..... The competent administrative authorities may, where appropriate, and in the event of a violation of one of the cases mentioned above, issue a formal notice to the concerned trade union organization in order to regularize its situation within the prescribed time limits.”

33. A trade union organization may be established:

- As a preliminary step toward the establishment of another union.
- It may also be established for the purpose of achieving a specific objective.
- It may likewise be established for a fixed period as stipulated in its statutes.

34. These authorities consist of:

- The authority of the Ministry of Labor with respect to all forms of national and inter-state unions.
- The authority of the Provincial Governor with respect to all forms of provincial and municipal unions.

35. This requires legitimate evidentiary documentation.

Disclosure statement

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Human or Machine? Exploring Gen Z's Perceptions of Authenticity in AI-Driven Marketing

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Abstract

Objective: This study explores how Generation Z consumers perceive AI-generated versus human-created brand content, focusing on perceived authenticity, emotional engagement, and ethical transparency. As brands increasingly integrate AI into their storytelling, understanding these perceptions is crucial for maintaining trust and connection.

Method: An exploratory qualitative approach was adopted. 17 Generation Z participants aged 18–25; both genders from Algeria took part in semi-structured interviews. During each session 30–45 minutes, participants viewed brand images and short video clips produced either by AI or by human creators. Data were analysed using reflexive thematic analysis with the assistance of NVivo software.

Results: Five core themes emerged: (1) Perceived authenticity as a determinant of emotional resonance, (2) Credibility and trust shaped by transparency and perceived effort, (3) Emotional impact and engagement driven by narrative warmth, (4) Narrative attachment to human storytelling, and (5) Ethical reflection emphasizing the moral responsibility of disclosure.

Implications: The findings highlight authenticity and honesty as essential pillars for effective AI-driven branding, suggesting that brands should disclose AI involvement to preserve credibility and emotional resonance.

Keywords: Brand Content, Generated AI, Perceived Authenticity, Generation Z

Introduction

Recently, digitalisation has transformed nearly every facet of marketing, encompassing content creation and consumer interaction (Cioppi et al, 2023). With brands utilising digital channels increasingly, they have consequently implemented digital strategies that enhance customer communication, including resorting to the power of analytics in order to help personalise approaches and optimise the customer experience (2023). Digitalisation represents the integration of digital technologies into everyday life and business activities, resulting in the change of organizational processes, consumer experiences and new market offerings (Calderón-Monge & Ribeiro-Soriano, 2024); (Artusi, Snihur, & Marullo, 2024). This shift in marketing led to the creation of new tools, platforms, and techniques that aim at creating compelling and interactive brand experiences (Lemon & Verhoef, 2016). Content marketing is a foundational aspect of digital marketing, signifying the practice of intentionally and consistently creating and sharing relevant and valuable content to attract, acquire and engage a clearly defined and understood target audience – to drive profitable customer action (Pulizzi, 2014). Unlike traditional methods of advertising content marketing places emphasis on telling a story, evoking an emotional response, and educating customers. It is particularly beneficial in addressing the problems of receiver overloading and consumer wear-out of traditional advertising (Dessart, Veloutsou, & Morgan-Thomas, 2019); (Gowda & Archana, 2024). The rise of generative AIs is a step forward in content creation. GenAI refers to the artificial intelligence systems which can create "new" data, such as text, images, video or audio content, by using large datasets and methods of machine learning (Heigl, 2025). Tools like Marketers, for text, Midjourney, for photos and Sora, for video, are already using ChatGPT to automate and personalise creative production (Heitmann, 2024). This has reignited debate around authorship, novelty, and affective content in computer-generated work (Smith & Hutson, 2024). This research explores the concept of perceived authenticity that refers to the subjective judgment that the consumers develop regarding the truthfulness, genuineness and cultural/historical match of a product, experience or practice (Kolar & Žabkar, 2010). It results of subjective judgment following on perceived trustworthiness and consistency of expectations against experiences. The perception is socially constructed through the compromise between the objective features of the offer and recipients' subjective interpretation (Napoliet al, 2014). Authenticity is becoming increasingly important to online consumers, particularly Generation Z, who oftentimes prefers raw, relatable, and humanized content to polished, overly produced corporate messages (Seemiller & Grace, 2019). According to recent studies, brand authenticity is an important predictor of brand warmth, experience, and trust (Safeer, He, & Abrar, 2021); (Deng, Wang, & Li, 2024). Relevant in this context is narrative engagement, or narrative transportation, which is associated with a psychological state in which persons are mentally and emotionally immersed in a narrative (Sestir & Green, 2010). The persuasive effect, emotional intensity, and memory of a story with high involvement of the audience are higher (far

than those of one with low involvement (Green & Appel, 2024). However, it is unknown whether AI-authored stories may be able to achieve the levels of engagement, and emotional authenticity of human-authored stories, such as user testimonials or brand stories (Wahid et al, 2023). In light of the growing application of generative artificial intelligence (GenAI) in brand storytelling, research is needed to understand how young consumers appraise, evaluate and emotionally respond to AI-produced narrative content as opposed to the same content produced by a human. This article studies Generation Z as a particularly digitally literate cohort, and a group with critical attitudes to the corporate communication content they consume, alongside a strong desire for authentic, creative and emotionally relatable material. Seemiller and Grace (2019). However, digitalisation and the rise of generative AI tools have profoundly altered the marketing landscape, notably in branded storytelling and content creation. On the other hand, such rapid development has raised crucial questions in terms of their efficiency and popularity from a user perspective. The increasing dependence on AI-produced content to elicit emotional engagement raises important issues with the perceived authenticity, trustworthiness, and narrative coherence of this content (Huschens et al., 2023); (Limantara, 2024). Despite huge developments in AI generative technologies and their ability to help brands 'write' compelling narrative content, consumers remain suspicious of machine-generated materials, particularly when it comes to emotionally engaging storytelling or the personal endorsement of a product. This scepticism raises a critical issue on the importance of authenticity in marketing and the potential gap between AI-made narratives and real-life human experiences. To surf on this vast wave is a challenge, as brands should blend between state of the art technology and transparent, understandable and approachable conversations with its audience. Studies show that consumers often view AI-derived content as less credible and express concerns for its emotional richness and authenticity when compared to human-authored narratives (Kirk & Givi, 2024); (Belliset al, 2024). Additionally, brand authenticity is also an important driver of consumer contact and trust, especially among millennials who value the authenticity and ethical agreement of brand messages. The increasing use of AI in marketing raises crucial questions about the maintainance of the perceived truthfulness of brands in consumer engagements, particularly in the context of consumers' increasing desire for ethical and transparent business practises (Wen & Laporte, 2025). New studies show that generative AI can dramatically improve the efficiency of marketing content creation as well as enable deep personalization. AI has been used for optimal creation of content, thus reducing time and resource consumption (Potwora, et al, 2024); (Tang, 2024). Alternatively, it permits tailored messages to engage and be relevant to individual consumers, seem to be important to consumers (Gungunawatt et al, 2024); (Gao & Liu, 2023). Yet, for all this benefit, there are those who warn of the potential drawbacks, referencing the risk of disconnection (emotional distant, perceived "manipulation" or ethical ambiguity in AI-generated marketing materials) (Leib et al, 2021). Academics echo this concern, describing how if AI becomes too personal (i.e., hyper-personalised), it can lead to a loss of

authenticity and trust, especially when users do not know AI is being used in a particular decision-making process. The use of persuasive algorithms poses ethical implications with regard to consumer autonomy and transparency and could lead to reputation damage for firms in the long run. These gaps highlight a lack of understanding in how digital consumers specifically Gen Z digital consumers- evaluate AI-synthesized content in terms of utility and emotional, ethical, and sensory attributes. The lack of empirical data about how the current generation perceives the believability, emotional attachment and authenticity of AI-created stories calls for a deeper qualitative inquiry.

Given the growing use of generative artificial intelligence (GenAI) in marketing and the lack of empirical evidence on how young consumers perceive such content, this study seeks to address the following research question: *How do Generation Z consumers perceive and evaluate AI-generated versus human-created brand content, particularly in terms of authenticity, emotional engagement, and credibility?*

From this main research question, arise the following sub-questions, which aim to explore its various dimensions in more depth:

RQ1a: How do these perceptions influence emotional connection, trust, and narrative attachment toward the brand?

RQ1b: How does the type of narrative format (blog posts, social media images, customer testimonials) affect perceived authenticity and engagement?

RQ1c: What ethical reflections or concerns emerge regarding transparency and the disclosure of AI use in branded storytelling?

The aim of this paper is to explore Generation Z's attitudes toward AI-generated versus human-created advertising content, with a particular focus on authenticity, emotional expressivity, and credibility. The study seeks to contribute to ongoing academic discussions about the role of generative AI in content marketing, while offering reflections on the evolving expectations of a generation raised in a highly digital environment.

Specifically, it examines how digitally native consumers perceive and emotionally respond to marketing stories co-created by AI and by human creators, and how these perceptions differ across three content formats: blog posts, social media images, and customer testimonials. The goal is to understand the subtle nuances of perceived authenticity, emotional connection, and narrative credibility within these two modes of storytelling. By doing so, the study aims to enrich the emerging literature on human-AI collaboration in marketing and to provide actionable insights for content creators, marketers, and brand managers seeking to engage younger consumers in more authentic and emotionally resonant ways.

Theoretically, this study contributes to the understanding of authenticity and emotional engagement in AI-generated storytelling, an area still at an early stage of academic inquiry. From a managerial perspective, it offers practical guidance for brands on how to use AI creatively yet transparently to enhance consumer trust and preserve the human dimension of digital communication.

Our research is of a qualitative and exploratory nature, grounded in the interpretivist (constructivist) paradigm. Considering the study's purpose to understand subjective perceptions and affective reactions, as well as authenticity judgements of AI-established versus human-created marketing content, a constructivist approach was believed to be appropriate. According to Evrard, Pras, and Roux (2009), in the interpretivist paradigm meaning was not directly transcendent but, constructed collectively between the researcher and subjects, hence, is suitable method in the studying complex situation based on human experience and social contexts

I. Methodology

I.1. Research Paradigm

The study adopts an interpretivist paradigm, in which reality is understood as a product of individuals' subjective experiences, interpretations, and interactions with their environment. Rather than seeking to establish objective truths, this approach aims to understand how participants construct meaning around AI-generated marketing texts. It is particularly suitable for exploring perceptions of authenticity, emotional impact, and trust within computer-mediated communication. As Evrard, Pras, and Roux (2009, pp. 29–30) emphasize, interpretive perspectives in marketing do not aim to generalize findings but rather *“to achieve a rich and distinctive understanding of phenomena in their context.”*

I.2. Context and Research Design

Given the emerging nature of generative AI in marketing, an exploratory qualitative design was adopted to gain an in-depth understanding of how individuals perceive and emotionally respond to AI-generated content compared to human-created material. This design allows the generation of new insights in an inductive, data-driven manner rather than testing pre-formulated hypotheses.

Data were collected through semi-structured interviews, allowing for a balance between guided discussion and open exploration of participant perspectives. A theme-based interview guide was developed, covering core constructs such as digital content practices, perceived authenticity, emotional engagement, and ethical reflection.

I.3. Participants

Participants were recruited using purposive sampling from Generation Z (aged 18–26), known for their high digital literacy and frequent engagement with online marketing content. Recruitment was carried out via targeted social media outreach and academic networks. The final sample consisted of 17 participants (both genders) residing in Algeria.

The sample size was determined based on data saturation interviews continued until no new information or themes emerged, ensuring both depth and representativeness of insights (Guest, Bunce, & Johnson, 2006).

Table 1 below details the demographic characteristics of the sample, including participants' gender, age, and education level.

Table n°01: Profile of Participants

Participant Code	Gender	Age	Education Level
01	Female	23	Graduated
02	Male	23	Graduated
03	Female	22	Graduated
04	Female	24	Graduated
05	Male	21	Graduated
06	Male	21	Graduated
07	Female	23	Graduated
08	Male	24	Graduated
09	Male	23	Graduated
10	Female	23	Graduated
11	Male	21	Graduated
12	Female	24	Graduated
13	Male	24	Graduated
14	Male	23	Graduated
15	Female	21	Graduated
16	Male	21	Graduated
17	Female	34	Graduated

The stimuli were pre-tested and validated by two marketing communication experts to ensure realism, coherence, and clarity. Images were embedded directly into the interview guide, while videos were shared via secure hyperlinks for accessibility.

I.4. Research Design

The stimuli used in the interviews represented five thematic dimensions of AI-generated versus human-created content.

- 1- Perceived Authenticity: examined the extent to which the content appeared genuine, human-like, and emotionally real.
- 2- Credibility and Trust: focused on participants' perceptions of reliability and confidence in the message and its source.
- 3- Emotional Impact and Engagement: explored how the content captured attention and elicited emotional reactions or empathy.
- 4- Narrative Attachment: assessed participants' level of immersion and emotional connection with the story presented.
- 5- Ethical Reflection: addressed moral and transparency concerns regarding the use of AI in branded storytelling.

Table n°2: interview themes table

Theme	Analytical Dimension	Stimuli Used
Perceived Authenticity	Perceived authenticity of marketing content	Image A: AI-generated visual (e.g., Midjourney)
Credibility and Trust	Perceived credibility and trust	Image B: Authentic handmade brand image
Emotional Impact and Engagement	Emotional resonance and viewer engagement	Text A: Blog post generated by ChatGPT
Narrative Attachment	Narrative preference and emotional attachment	Text B: Human testimonial on LinkedIn
Ethical Reflection	Ethical perceptions of AI in marketing	Video A: AI-generated video

Source: Elaborated by authors

1.5. Procedure

Interviews were done in-person, individually, or online, based on participant availability. Depending on participant option, each session was conducted in either Arabic or French and lasted between 30 to 45 minutes.

Three primary steps were taken in the process:

Introduction: The aim of the study and the fact that participation was voluntary were explained to the participants.

Exposure: Marketing materials produced by AI and humans were displayed to the participants. Participants responded to each stimulation by sharing their ideas, feelings, and moral considerations.

After obtaining consent, all interviews were audio recorded and verbatim transcribed for analysis.

1.6. Ethical Considerations

Ethical protocols were rigorously followed. Participants provided informed consent, were assured of confidentiality, and were assigned coded identifiers (e.g., P1, P2). The study complied with institutional ethical guidelines and received approval from the Ethics Committee of Djilali Liabès University. Participants were informed of their right to withdraw at any time without penalty. Data were securely stored and used exclusively for academic purposes.

1.7. Data Analysis

Transcribed interviews were analyzed using reflexive thematic analysis (Braun & Clarke, 2006), supported by NVivo software. The process followed six stages: familiarization, coding, theme development, review, definition, and interpretation.

The analysis focused on identifying patterns of meaning in participants' narratives concerning authenticity, emotional engagement, credibility, and ethical perceptions. Both inductive coding (emerging from data) and deductive interpretation (guided by theoretical constructs) were employed.

I. 8. Methodological Rigor

To ensure credibility, reliability, and transparency, several quality criteria were applied:

- 1- *Credibility*: achieved through participant quotations and triangulation of stimuli (visual, textual, video).
- 2- *Audit trail*: maintained by documenting all analytical decisions and coding processes.
- 3- *Reflexivity*: ensured through a researcher's journal capturing assumptions and interpretive reflections.
- 4- *Peer debriefing*: two academic colleagues reviewed a subset of transcripts and codes to validate interpretive consistency.

These procedures collectively reinforced the trustworthiness and rigorous interpretive quality of the study.

II. Results and discussion

This section presents the main themes of the content analysis organized according to these five categories: Perceived Authenticity, Credibility and Trust, Emotional Impact and Engagement, Narrative Attachment, and Ethical Reflection. These themes represent how consumers cognitively and emotionally respond to human vs. AI-authored marketing content and are related to authenticity, trust, emotional connection, narrative affiliation, and ethical considerations. Participant quotes are provided to supplement each theme for a more enlightened analysis.

II.1. Perceived authenticity

The handwritten brand image was viewed as more genuine than the AI-generated one by the vast majority of participants (about 14 out of 17). Emotional salience, anthropomorphism, visual realism, and the apparent human work and care that went into the product were the foundations of this prevailing view.

Respondents frequently around 15 of them said the photo that was made by hand "looked more real," and provided a "human touch," a "connections" that was stronger because of its natural light, texture, and imperfections perceived marks of authenticity .

...“The handmade brand image feels more authentic because it looks more real and natural, not digitally created. It gives a sense of personal effort and craftsmanship that AI-generated images often lack...” (Student, 21)

...“Looking at the images, the authentic handmade brand image definitely feels more real and genuine. There’s something about the imperfections and texture that gives off a human touch...” (Student, 22)

The AI-generated picture, on the other hand, was described by most respondents about 12 participants as 'too perfect,' 'too cold,' or 'too empty things that betrayed its supposed authenticity. They said that even though the AI version was technically perfect, it seemed soulless and preplanned, making the scenes come off as fake or rehearsed .

“...The AI one looks polished, but almost too perfect, like it’s trying too hard and it looks cold...” (Student, 22)

“...The AI-generated image looks fake and too perfect, like it’s silent or empty...” (Student, 22)

These judgments relied on aesthetic cues. Nearly all participants about 15 out of 17 used cues such as shadows, lighting, composition, and color saturation to make attributions of human intention and environmental realism. The crafty-looking image was lauded majority around 13 participants for expressing a real-life sense of mood and/or context, occasionally triggering connotations such as seasonal exuberance or even a certain way of life.

“...The natural background and the shadows reflected on the table suggest the presence of sunlight... The image also gives me a sense of safety and trust toward the product and the brand...” (Student, 23)

...“The image gives an energy of summer and of a beautiful day, the energy of having fun and enjoying the moment... The AI one feels staged or artificial without any energy...” (Student, 22)

Several participants around one-third of the sample made comments that the handmade image led to better emotional and cognitive engagement because it was more memorable and relatable, and more expressive of the brand’s values. The imperfections and personal mark of the image were presented not as flaws, but as proof of sincerity and meaning .

“...You can sense the love and care that went into creating it, which makes it more meaningful and genuine...” (Student, 24)

“...The handmade branding gives off a vibe that real people care about what they’re making...” (Student, 22)

A small minority (about three participants) expressed a slightly different view, noting that the AI-generated image was aesthetically appealing and professionally refined, though still lacking emotional warmth.

Overall, perceived authenticity as a construct seemed to be steeped in strong emotional and sensory experiences, not so much related to how well defined or resolution qualities in the image or story, but rather the story and labor of humanity the audience perceived behind the images. The AI michelle the image - even with all the hi tech, was regarded as cold and 'unfeeling' in terms of representing a brand identity and human emotion.

In relation to RQ1 and RQ1b, these findings suggest that Generation Z consumers evaluate AI-generated and human-created brand visuals through the lens of emotional authenticity rather than technical quality. The results demonstrate that perceived authenticity is closely tied to human imperfection, emotional realism, and effort — elements that drive deeper engagement and trust. This supports the idea that, for young

consumers, authentic brand storytelling emerges not from digital perfection but from the visible and emotional trace of human presence behind the message.

II.2. Credibility and Trust

Participants were significantly more trusting of and attributed greater credence to human-written content compared with content generated by AI. This was the view of the vast majority about 15 out of 17 participants. One recurring justification was that human-authored messages expressed lived experience, emotional resonance, and an authentic communicative intent that AI-generated messages did not.

‘...The human testimonial seems more credible because it shows a real experience of people who actually used the product or the service... I can't fully rely on what [AI] says...’ (Student, 22)

‘...The human-written text seems more credible because it has a soul and it comes from the heart... with just enough words used to give an idea to the reader...’ (Student, 22)

While AI-generated content was generally regarded by most respondents around 13 participants as well-organized and grammatically correct, many emphasized that it often lacked an appropriate tone, sentiment, or displayed signs of over-commercialism. This generated skepticism and reduced trust toward brands relying heavily on automation in their communication strategies.

‘...Yes, it affects my trust because I feel like the content is fake and there is no effort or real emotions put into it...’ (Student, 21)

“...When a company relies only on AI, it feels like they didn't make the effort to speak about their product themselves...” (Student, 24)

Transparency and intention were recurring themes among several respondents (about one-third of the sample) when evaluating the use of AI. Although a few participants (around 4 out of 17) were open to AI-generated content if its use was clearly disclosed, the majority approximately 13 participants associated credibility, authenticity, and loyalty with human-written messages.

“...If I find out a brand uses AI for everything, I'd question if they even care about connecting with people. However, if they are upfront... maybe it is okay. Hiding it feels sketchy...” (Student, 23)

“...Knowing something was written by AI doesn't automatically make me distrust the brand... but I do tend to trust brands more when I know a real person is behind the message...” (Student, 21)

One or two participants held a different perspective, suggesting that AI-generated text could appear more credible due to its clarity, structure, and neutral tone. However, the overwhelming sentiment across the group was that true credibility derives not only from coherence or grammar, but from perceived human intent, emotional depth, and care — qualities participants felt that only humans can genuinely convey.

“...The first text seems more credible to me because... it feels like it was written with care and intention by someone who understands the topic...” (Student, 22).

Overall, these findings support RQ1a and RQ1c by showing that trust and credibility judgments among Generation Z depend strongly on perceptions of human intention and transparency. This aligns with existing literature emphasizing that brand credibility is not solely linguistic or structural, but experiential and affective, rooted in perceived honesty and human connection (Lemon & Verhoef, 2016; Wen & Laporte, 2025).

II.3. Emotional Impact and Engagement

Throughout participants' answers, the human-made video evoked stronger emotional engagement compared to the AI-generated video. This observation was shared by nearly all participants around 15 out of 17. The discrepancy was based on perceived realism, emotional depth, sensory richness, and the sense of human presence behind the image and the voice.

The visual and acoustic signs including authentic ambient sound, human voice-over, and natural animal movement were identified by the majority of respondents about 14 participants as powerful emotional triggers and empathy enablers.

"...The human video affects me more because it's smooth and relaxing. It's nice to watch and makes me feel calm, which helps me connect with it more..." (Student, 21)

"...Watching the animals, insects and birds in their natural environment: eating, hunting, just living their lives felt real and immersive..." (Student, 22)

For most participants around 13 out of 17, emotional realism depended on the perceived human effort and intention behind the work. Knowing that a person had filmed the scenes with patience and care gave the content additional emotional weight and memorability. .

"...here's something deeply grounding in knowing that a human was behind the camera, patiently waiting for the perfect shot..." (Student, 23)

The AI-generated video, in contrast, was criticized by a large majority about 12 participants) as having an emotional response that was "flat," "unfelt," or "unnatural." While technically impressive, it failed to create a tactile or emotional connection. Common criticisms included artificial movement, lack of sound, and a rehearsed feeling.

"...The AI-generated video is silent. Even though it looks real, something is missing—it feels empty, like it has no emotions..." (Student, 22)

"...The dogs moved in a strange, unnatural way, which made it feel fake and a bit distracting..." (Student, 21)

A small minority (2 or 3 participants) appreciated the AI video for its novelty and technical sophistication, but still found it emotionally detached.

"...Even though the OpenAI Sora video with the snow dogs was intriguing... it didn't leave the same emotional impact..." (Student, 24)

Beyond visual content, participants responded to a symbolic and emotional dimension—linking the human-crafted video to realness, care, and expressive intent, while the AI-based one was perceived as soulless or mechanical.

"...It's simply human I can feel the connection and it's addressing me in my own language. It's realistic, vivid, and full of life..." (Student, 22)

...“A human-made video is more emotional. I can visually see the life in that jungle and even hear it, while in the AI-made one, the puppies look fake...” (Student, 23)

Ultimately, emotional engagement emerged as a multisensory, value-driven response, shaped by realism, human agency, and expressive imperfection. Although visually refined, the AI-generated video lacked emotional texture, thereby diminishing its empathic resonance. In contrast, the human-created video’s minor flaws and spontaneous moments were seen as authentic emotional cues, reinforcing connection and trust toward both the content and the sponsoring brand.

“...Of course the human video, because it is real—and nothing is better than God’s creation. Subhan Allah...” (Student, 24).

In connection with RQ1b, these findings demonstrate that emotional impact and engagement are strongly mediated by perceived human involvement and sensory realism. Generation Z participants were more emotionally transported by narratives that conveyed effort, imperfection, and human intent, echoing theories of narrative attachment and authenticity in the literature (Sestir & Green, 2010; Green & Appel, 2024). This suggests that while AI-generated media can achieve technical excellence, it still struggles to reproduce the emotional richness and authenticity necessary for deep consumer engagement.

II.4. Narrative attachment

Brand narratives that were told or co-generated by humans received higher levels of emotional and engagement-based evaluation from the vast majority of participants (around 14 out of 17, representing approximately 82%), compared with entirely AI-generated stories. This attachment was grounded in a sense of reality, emotional richness, and a feeling of proximity to genuine human experience.

Respondents repeatedly emphasized that the human-made story was “more believable,” “grounded in real experience,” and conveyed “true emotion” that allowed them to feel connected to the brand. About 13 participants mentioned that authentic testimonials “feel like someone telling something they lived through” and that such accounts “help build trust because it’s someone like me telling it.”

“...The human-made story is more believable and engaging. It’s based on real feelings...” (Student, 21)

Meanwhile, the AI-generated tales, though sometimes well-constructed and linguistically fluent, were described by most participants (around 12 out of 17) as emotionally flat or overly polished. Several said they found AI narratives “a bit too smooth,” “algorithmically generated,” or “lacking something human,” which weakened their believability and emotional resonance.

“...It sounds good, but it’s just words no real emotion behind it...” (Student, 21)

Visual storytelling also emerged as a significant factor for narrative attachment. Around 10 participants noted that human-told narratives were accompanied by vivid mental imagery and natural emotional expression, allowing them to “see and feel” the story. The

perceived authenticity and emotional involvement of the storyteller enhanced the brand's legitimacy.

"...The visuals in the human video make the story more engaging it feels real..." (Student, 23)

A small number of participants (about 3 out of 17) acknowledged that advanced AI tools could closely approximate human storytelling, especially when modeled on real events. However, even among these respondents, the consensus was that "something is always missing" a sense of depth, immediacy, or subtlety arising from lived human experience.

"...You can tell when it's just a smart script, not a real memory..." (Student, 24)

Emotional realism, expressive clues, and the perception of human presence all served as the foundation for the multifaceted construct that was narrative attachment. Participants frequently believed that AI's emotional authenticity and narrative immersion were limited by its lack of lived experience, despite the fact that AI can replicate storytelling.

These results imply that when participants believe that a tale is based on human intent and lived experience, emotional connection, trust, and narrative attachment are substantially stronger in relation to RQ1a. According to theories of authenticity and narrative transportation (Sestir & Green, 2010; Green & Appel, 2024), this suggests that Generation Z consumers are more interested in stories that convey genuine human emotion and experiential truth than in ones that are precisely calculated by algorithms. These findings support the idea that emotional credibility and authenticity are still key components of brand storytelling efficacy in the AI era.

II.5. Ethical Reflection

Transparency about any use of AI-generated work was broadly regarded by the vast majority of participants (around 13 out of 17, approximately 76%) as a core ethical responsibility. The clarity over whether or not content—specifically images or videos had been generated by AI was cited by many as a direct indicator of a brand's honesty and trustworthiness.

Participants repeatedly emphasized that AI-generated content is not inherently negative, but that transparency fosters consumer trust and reflects a brand's respect for its audience. Concealing the use of AI was commonly viewed as potentially deceptive, especially when emotional engagement was involved.

"...If I found out later that something I connected with emotionally was made by AI and the brand didn't say so, I might lose trust..." (Student, 22)

The effect of AI disclosure appeared to vary depending on content type and product category. About 10 participants indicated that they were more tolerant toward AI-authored textual content, yet expressed greater concern when visual content (images or videos) was involved particularly in industries requiring high authenticity, such as skincare, food, or artisanal products.

“...If the pictures or videos are AI-generated, it could confuse customers. It would affect my decision more than just AI-written text...” (Student, 24)

“...For ethical products, I’d rather support a brand that’s transparent than one hiding behind AI...” (Student, 22)

This ethical consideration also extended to consumer decision-making, especially in the evaluation of alternatives. About nine respondents mentioned that discovering a brand’s concealed use of AI could lead them to prefer human-made or transparent competitors. “...In the decision-making process, I’d be more driven toward the human option if I sensed dishonesty...” (Student, 23)

However, a small minority (about 3 participants) expressed a more pragmatic stance, suggesting that content quality could sometimes override concerns about its origin, provided the message was clear and not misleading.

“...If the AI content is convincing and still delivers, I might appreciate the innovation and still buy the product...” (Student, 21)

Despite these nuances, the dominant view (around 14 participants) was that consumers have a right to know whether the brand content was created by humans or AI. For them, this demand was not limited to authenticity, but extended to broader ethical principles such as integrity, consent, and agency in digital communication.

“...Secrets make me wonder what else they’re hiding. I want to know if I’m talking to a human or a robot...” (Student, 24)

Ethical debate over AI-generated content has focused largely on consumer rights, consented use, and brand transparency. In general, consumers were open to content creation being assisted by AI, however, they required full disclosure of the AI’s involvement. In the absence of transparency, we tend to mistrust it, especially when the context is one of emotional connection or the product involves strong ethical or personal values. In general, consumer rights, informed permission, and brand transparency were at the centre of the ethical discussion around AI-generated content. Participants were receptive to the use of AI as a creative tool, but misinformation led to mistrust, particularly when the message or product had moral or emotional meaning.

Regarding RQ1c, these results show that Generation Z’s assessment of AI-generated marketing content is heavily influenced by ethical considerations and transparency standards. For this group, authenticity includes the moral integrity of the brand’s communication strategies in addition to aesthetics and realism. This supports earlier research on digital transparency and ethical branding (Wen & Laporte, 2025; Leib et al., 2021), demonstrating that revealing AI involvement is a strategic trust-building tool that is necessary for sustaining customer loyalty rather than just a compliance gesture.

II. Conclusion

This study aims to provide some insights into whether consumers distinguish between brand content produced by humans and content written by AI, and how they respond to them by considering perceived authenticity, narrative attachment, and ethical reflection.

Practical implications: The results provide useful implications for when emotional, cognitive and ethical dimension of consumer reactions to AI-based branding are concerned.

It is found that human-generated content is generally perceived to be more authentic by consumers. Natural imperfection, emotional expression, and evidence of human work are part of a greater realism and authenticity. On the other hand, though AI-made visuals or narratives are very impressive technically, they are often considered somewhat slick, emotionally uninspiring, or unable to provide the subtle clues that indicate real human participation.

Narratively, for emotional engagement consumers reported more emotional attachment to true stories. Stories delivered from a human perspective were judged as being more engaging, identifiable and believable. AI-generated stories can be immersive, but generally struggle to capture the emotional weight and nuance of human expression. Somehow consumers intuitively know this and therefore prefer all but authentic content that reflects real life.

From the ethical point of view, transparency was considered to be a major issue. Overwhelmingly, consumers favored brands indicating that AI was used in creating the ads. When such information is kept concealed, it creates doubts over the brand's integrity, eroding trust—overshadowing more intangible product categories for which 'authenticity' and 'ethics' count for everything. Conversely, if AI usage can be openly discussed and does fit within brand values, it can be accepted — indeed valued — as sign of innovation.

In general, according to the study, brands need to responsibly integrate AI to ensure that innovation does not act against trust and emotional connection. Staying true, promoting impactful stories, and being honest about the use of AI are key ingredients in the recipe to capturing the hearts of consumers and brand fans in the AI era.

Theoretical Implications

This research contributes to the growing literature on AI-driven content marketing and brand authenticity by extending understanding of how digital-native consumers — particularly Generation Z — perceive and interpret AI-generated storytelling. It provides empirical evidence that perceived authenticity and emotional resonance remain key mediators of consumer trust even in technologically advanced contexts. Moreover, the study reinforces theoretical perspectives from narrative engagement theory and authenticity frameworks (Kolar & Žabkar, 2010; Green & Appel, 2024) by showing that emotional depth, human imperfection, and communicative intent constitute central elements in perceived realness. Finally, it enriches the emerging debate on AI ethics in marketing, suggesting that disclosure and transparency are intrinsic to perceived moral legitimacy.

Managerial Implications

From a managerial standpoint, the findings emphasize that AI should be used as a creative enabler, not a human substitute. Marketers are encouraged to maintain a human presence in AI-assisted narratives — for example, by blending algorithmic precision with human storytelling. Brands should also disclose AI involvement openly to avoid eroding consumer trust. Practitioners are advised to emphasize authentic, emotionally rich storytelling and to design campaigns that balance innovation with sincerity. Particularly for industries where authenticity is core (e.g., food, cosmetics, or crafts), transparency about AI use can become a competitive differentiator, reinforcing brand credibility and ethical reputation.

Limitations

This study is exploratory and based on a qualitative sample of 17 Generation Z participants in Algeria, which limits the generalizability of results to broader populations. The reliance on self-reported perceptions also introduces potential biases, as participants may idealize authenticity or underestimate AI's evolving capabilities. Furthermore, the study focused on visual, textual, and narrative stimuli in specific contexts; future research might consider cross-cultural comparisons or alternative content formats (e.g., immersive or interactive AI-generated media).

Future Research Directions

Future studies could adopt mixed or quantitative approaches to validate these findings on a larger scale and measure the impact of AI disclosure on consumer trust and loyalty. Another promising direction would be to examine how cultural context and digital literacy moderate perceptions of AI-generated content. Longitudinal research could explore whether attitudes evolve as consumers become increasingly exposed to AI co-created materials. Finally, integrating neuroscientific or biometric methods could offer deeper insights into the emotional and cognitive processing of AI versus human content, advancing both theory and practice in digital marketing ethics.

Disclosure statement

No potential conflict of interest was reported by the authors.

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Appendix

Interview Guide

Title: Exploring Consumer Perceptions of Authenticity and Emotional Impact in AI-Generated vs. Human-Generated Marketing Content

This study aims to explore how consumers perceive digital marketing content created by artificial intelligence (AI) tools (such as ChatGPT, Midjourney, and Sora) compared to content created by human marketers. We will explore your opinions about authenticity, trust, emotional reactions, and the role of AI in marketing. Your responses will remain anonymous and are used only for academic purposes. The interview will last approximately 45 to 60 minutes. You will be shown different examples of marketing content and asked to share your impressions.

Respondent Profile

Sex :

Age

Professional Activity :

Perceived Authenticity

Visuals: AI-generated marketing image vs authentic handmade brand image



AI-generated marketing



Authentic handmade brand image

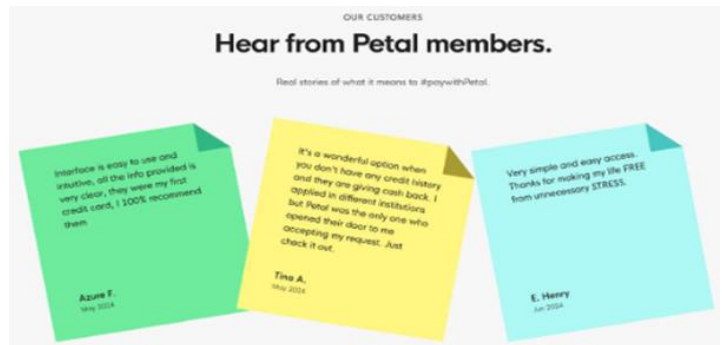
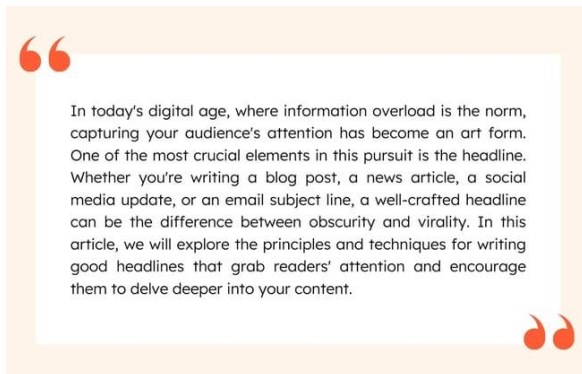
Which image feels more authentic? Why?

.....

.....

Credibility and Trust

Texts: AI-written blog post vs human testimonial



- Which text seems more credible to you? Why?

.....

.....

.....

- Does knowing a text is AI-generated affect your trust in the brand?

.....

.....

Emotional Impact and Engagement

Videos: AI-generated ad vs Human video



AI- generated video



Human video

- Which video affects you more emotionally? Why?

.....

.....

Narrative Attachment and Credibility

Storytelling: AI co-written brand story vs authentic customer stories



AI co-written

AI co-written brand story



AI co-written brand story

- Which story feels more believable or engaging? Why?

.....

.....

- Can AI-generated stories feel human to you?

.....

.....

Ethical Reflection

- Should brands disclose when content is AI-generated?

.....

.....

- Would it change your buying decision?

.....

.....

Digital Transformation and Its Impact on Public Policy-Making in Arab States


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Abstract

This study examines digital governance and clarifies the gap in public policymaking between Arab countries and countries leading in digital transformation. Adopting a comparative analytical approach, the study proposes solutions and opportunities to enable Arab countries to implement digital governance across all sectors, within a solid legal framework. This can be achieved by developing a comprehensive national strategy, enhancing regional cooperation in cybersecurity, and exchanging expertise and technologies. These measures contribute to digitizing public policies and overcoming the challenges that hinder sustainable development across multiple dimensions.

Keywords: Digital Transformation, Public Policies, Digital Governance, Arab Countries, Regional Cooperation

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Introduction

In the wake of the digital revolution that has swept the world, digital transformation has become a strategic imperative rather than a merely complementary option. Various countries have therefore hastened to adopt its tools and employ them across different fields. This orientation has not been driven solely by the desire to keep pace with civilizational and technological development, but also by the aim of addressing development challenges, improving the quality and efficiency of government services, and supporting them with the principles of transparency and flexibility. Accordingly, this research paper seeks to analyze the impact of digital transformation on the mechanisms of formulating, implementing, and evaluating public policies in Arab countries, with a focus on how this transformation reshapes the entire public policy-making cycle.

To achieve this purpose, the study adopts the descriptive-analytical approach to describe and analyze the dimensions and mechanisms of digital transformation in Arab countries, through reviewing applied models from leading countries such as the United Arab Emirates and the Kingdom of Saudi Arabia. The study will also shed light on other countries, such as Algeria, in their digital journey, while highlighting the obstacles and challenges that hinder the implementation of digital transformation in Arab countries. It will attempt to compare these experiences with those of more advanced countries in order to propose solutions and recommendations that have a positive and effective impact. Based on the above, the study raises the following problem statement: **How does digital transformation contribute to enabling Arab countries to develop more effective and inclusive public policies?**

From this stem the following sub-questions:

- What is the concept of digital transformation?
- What are the mechanisms of digital transformation for rationalizing public policies in Arab countries?
- Which countries are leading in the field of digital transformation?
- What are the key challenges facing this digital transformation?
- What solutions are proposed to address them in order to achieve sustainable development?

Significance of the study

The importance of this study lies in understanding digital transformation—especially in Arab countries—and how its technologies can be leveraged to improve the formulation and making of public policies, thereby ensuring the development of the various sectors of the state.

To answer this problem, the study addresses a set of main axes:

- Axis 1: The theoretical and conceptual framework of the study.
- Axis 2: Mechanisms of digital transformation in rationalizing public policies in Arab countries.

- Axis 3: Selected experiences of Arab countries in applying digital transformation in their public policies.
- Axis 4: The most important proposed solutions to the challenges facing digital transformation and ways to enhance its benefits.

Axis One: The Theoretical and Conceptual Framework of the Study

Key concepts related to public policy, digital transformation, and digital governance will be presented, with the aim of analyzing the relationship between them and clarifying their dimensions.

1. Public Policy

1.1 Concepts of Public Policy

There are many definitions of public policy, among the most prominent are the following:

James Anderson defines it as: “a purposive course of action followed by an individual or group in dealing with a problem or in addressing an issue, concern, or matter.” (Al-Kubaisi, 1999, p. 15).

Thomas Dye offers a different perspective, viewing public policy as: “whatever governments choose to do or not to do.” It also clarifies the nature of the government’s ideas for regulating conflict between society and organizational members, as well as a process that governs behavior, organizational bureaucracies, the distribution of benefits, tax collection, and so forth. (Dye, 1992, p. 3).

As an operational definition that brings together the common denominators of public policy, Fahmi Khalifa Al-Fahdawi defines it as: “an effective system (independent, changing, adaptive, and subordinate) that interacts with its environment and related variables through its dynamic responses (in thought and action), in a way that reflects the activity of official government institutions and their authorities within the surrounding social environment across its various fields. This occurs through objectives, programs, and regularized behaviors aimed at resolving issues, confronting existing and future problems, anticipating their repercussions, and identifying and preparing the necessary human, technical, and moral resources as important formal foundations for implementation and practical application. It also involves follow-up, oversight, development, and evaluation, in a manner that embodies the tangible realization of the shared public interest sought within society.” (Al-Fahdawi, 2001, p. 38).

1.2 Elements of the Public Policy-Making Cycle

The structure of public policy is formed by a set of interconnected and interactive elements known as the public policy-making cycle, as follows (Al-Fahdawi, 2001, pp. 41–42):

- **Problem Identification and Agenda Setting:**

Political demands refer to everything presented to government officials by citizens,

prompting the government to act on the issue at hand. For example, a demand might be raised by certain professional unions urging the government to intervene to prevent workers from being laid off. Such demands attract the government's attention and initiate the study of the policy-making process required to address them.

- **Policy Formulation:**

This includes *policy decisions*, namely the orders and directives issued by legally authorized government officials that express the content of public policy. It encompasses legislative frameworks that take the form of laws, the issuance of orders, the establishment of regulatory rules guiding administrative work, or providing procedural interpretations for the judiciary regarding the application of laws.

- **Policy Announcement (Policy Contents Advertisement):**

This refers to official speeches and announcements, or general governmental explanations and statements directed to citizens. Such announcements may take various forms in terms of their level of officiality. In all cases, the purpose is to demonstrate the government's effort and pursuit of social benefit, and to prevent misunderstandings or disputes over the content of public policy among all official and non-official parties.

- **Policy Implementation:**

Known as *policy outputs*, this consists of the set of actions, binding decisions, policies, and publicity produced by the political system. It represents the system's reactions—or its actual or expected response—to inputs coming from its environment. In other words, it reflects the concrete outcomes resulting from public policy, in light of policy decisions and statements that citizens observe in government actions.

- **Policy Evaluation:**

This represents the *policy impact*—the various returns or results that society receives from implementing public policy, whether intended or unintended. Every implemented policy generates outcomes that must be assessed to determine the extent to which it has achieved its objectives.

2. Definition of Digital Transformation and Its Dimensions

Digitalization constitutes a key driver in reshaping the relationship between the state and society by altering policy outputs and redefining policymaking through broader access to the internet—rapidly and across all regions without exception—as well as through e-health and e-learning services. This, in turn, raises citizens' expectations of their governments. (Policy Papers No. 03: *Digital Government Index*, 2019, p. 23).

It can be classified into three main dimensions:

- **The economic dimension:**

This dimension includes multiple domains (scientific, industrial, commercial, etc.) aimed at interaction and innovation in transactions, as well as an organizational data structure based on centralization and decentralization.

- **The technical dimension:**

This concerns centralized and decentralized infrastructure, the degree of its openness, its flexibility, and its capacity to accommodate new technologies.

- **Technology governance:**

This dimension identifies various aspects of control and interconnection, emphasizing the need for clear and dynamic interaction between governance/control mechanisms and the productive capacity of digital systems. (Juliane, Al Dakruni, & Mergel, 2025, p. 2).

3. Digital Government and Digital Governance

The COVID-19 crisis demonstrated the importance of digital transformation, especially as governments cooperated with one another. Digital government has become a necessity: it contributes to transforming government services, improving responsiveness and trust in the public sector, and achieving sustainable long-term digital transformation by providing a reliable and resilient digital environment and infrastructure, along with strong administrative frameworks that rely on emerging technologies such as artificial intelligence. (OECD Public Governance, 2023, p. 6). It also enables public policies by providing regulatory environments that meet digital transformation requirements for data collection and the delivery of information to all users.

As for **digital governance**, it is defined as: “the use of information and communication technologies to enhance public value through government-led initiatives within the public sector, as well as through external collaboration among key public stakeholders.” (Mehmah, 2024, p. 56).

Axis Two: Mechanisms of Digital Transformation in Rationalizing Public Policies in Arab Countries

At the **World Summit on the Information Society (WSIS) 2030**, the **Geneva Plan of Action** was adopted, comprising **11 action lines** to support the use of information and communication technologies (ICTs) to achieve sustainable development and build an inclusive information society (United Nations, 2024, p. 6). Arab countries’ orientation toward digitalization increased after the COVID-19 pandemic; however, the use of digitalization by decision-makers in shaping public policies—whether in design, implementation, or even evaluation—remains insufficient compared to developed countries that occupy top ranks in digital transformation and artificial intelligence. This shortage in the accuracy of available information has contributed to the persistence of challenges across various sectors. Yet, with the rapid development of AI, keeping pace

with these technologies has become a necessity and an imperative for Arab countries to align with global trends and achieve sustainable development.

1. International Standards and Indicators for Digital Government

To achieve effective digital transformation, many international organizations have sought to establish practical indicators that should be implemented on the ground, enabling decision-makers and users to apply digital government effectively. The most important of these are outlined below:

1.1 United Nations Digital Government Indicators

The United Nations seeks to establish indicators to assess the extent to which countries have achieved digital government across different domains, with the aim of accelerating progress toward the **Sustainable Development Goals (SDGs) 2030**. According to the UN 2024 report on e-government development, the global digital government development indicator has increased, with **60% of countries** moving toward the use of digital services, and **84% of countries** adopting national policies for digital identity and paperless transactions (United Nations, 2024). Among the key indicators emphasized in the UN e-government survey are:

- **E-Government Development Index (EGDI)**
- **Online Service Index**
- **Local Online Service Index**
- **E-Participation Index**
- **Open Government Data Index**
- **National Digital Performance Index**

1.2 OECD Digital Government Index (OECD, 2019, pp. 14-46)

The Organisation for Economic Co-operation and Development (OECD) sets precise standards and indicators to measure the effectiveness of digital government in countries, based on the use of digital technologies in the public sector, with the goal of achieving sustainable development. The index is based on six main dimensions:

1. Transition from e-government to digital government:

The goal is to build governments that rely on more flexible and responsive strategies by digitizing various processes and services, achieving openness, participation, governance, coordination, and the capabilities needed to support implementation—thus enabling policy makers to focus on service delivery and meeting demands in a flexible and proactive manner.

2. Adopting a “digital-by-design” approach:

This means embedding digitalization “by design” within national legislation, with the necessity of conducting assessments (transparency, accountability, participation, and proactiveness) to capture citizens’ views on legislation. This ensures that digital

government initiatives comply with the relevant standards.

3. **Building a data-driven public sector:**

In this dimension, the public sector adopts unified data policies in order to reuse data in planning, implementing, and monitoring public policies.

4. **Government as a platform:**

By creating clear and shared resources and tools to access guidelines, data, and various applications—opening the door to innovation in design and service delivery both within and beyond government.

5. **User-driven focus:**

By allowing space for users to express their needs, which are then placed at the heart of services, thereby enhancing collaborative administration, trust, and responsiveness. Participation in policy formulation creates opportunities for improvement.

6. **Proactiveness:**

Through governments' ability to offer options, solutions, and alternatives to citizens without waiting for formal requests—by collecting information and applying it to reassess and improve services.

To illustrate some differences among Arab countries in the use of certain indicators, the **UN E-Government Survey 2024** highlights leading countries in applying these indicators, as well as countries' affordability levels. For example, the affordability rate improved in **Algeria, Tunisia, and Morocco** from **59.14% to 43.59%**. In **Saudi Arabia**, the affordability rate also improved from **3.8% to 2.8%**. Meanwhile, the **United Arab Emirates** and **Bahrain** remained stable at **1.1%** and **2.8%**, respectively. Internet user rates also increased in **Tunisia, Algeria, and Morocco** by **+15%**, while growth in the **UAE, Saudi Arabia, and Bahrain** rose by **+5%**.

Table: Selected Digital Transformation Indicators in Arab Countries (2022–2024)

Internet users (%) 2022–2024	Affordability (as % of GNI per capita) 2022–2024	Arab countries in the top tier for digital transformation use (2022–2024)
Tunisia, Algeria, Morocco: from 59.14% to 68.3%	1) Algeria, Tunisia, Morocco: improvement in the ratio. 2) Saudi Arabia: improvement. 3) UAE: stable at 1.2%. 4) Bahrain: stable at 2.8%	1) Kingdom of Saudi Arabia 2) United Arab Emirates 3) Bahrain 4) Qatar 5) Sultanate of Oman

Source: Prepared by the researcher based on data from the United Nations report: *E-Government Survey 2024*. (United Nations, 2024)

2. Digital Transformation in Public Policymaking

Digital technologies contribute to rationalizing public policymaking across its various stages, leading to clearer and more effective policies. Many Arab—and even African—countries have achieved progress in this regard:

2.1 Providing the Data Needed for Decision-Making (Problem Identification and Agenda Setting) through:

- Many countries are working to provide large databases for policymakers to use in developing their policies, enabling sound and well-informed decisions based on accurate information and precise indicators. Examples include:
- Using the **Disaster Connectivity Map (DCM)** to support better emergency response efforts.
- Cooperation in developing curricula and activities between the **International Centre of Digital Innovation (I-CoDI)**, regional offices, and member states to facilitate an innovative approach, and the establishment of two regional hubs for the center in **Addis Ababa** and **Dubai**.
- Launching the “**Digital Transformation Wheel**” as a framework for developing targeted, data-driven interventions based on accurate information to support the economy and society.

2.2 Designing and Testing Digital Policies before Implementation to Ensure Policy Success (Policy Formulation and Testing)

Policies should be piloted in real-world settings before scaling up results. Key examples include:

- The **Smart Villages Project in Niger**, which concluded successfully and has served as an initial model adopted in several countries.
- The successful implementation of the public-private partnership model “**Be He@lthy, Be Mobile**” in four small island developing states in the **Caribbean** region.

2.3 Establishing Regulatory and Policy Frameworks to Support Digital Transformation (Decision-Making and Policy Implementation)

These laws and regulations serve as a framework to develop the use of digital transformation and ensure the protection of individuals’ data and privacy. Examples include:

- Providing step-by-step practical support for countries beginning their digital transformation through the “**5G Technology Accelerator**” platform.
- Discussing financial and economic incentives to accelerate digital transformation,

in a meeting held by the **International Telecommunication Union (ITU)** with economic experts on **10 May 2022**.

- The unanimous adoption by member states at the **World Telecommunication Development Conference (WTDC)**, held from **6 to 16 June 2022** in **Kigali, Rwanda**, of connecting schools to the internet to bridge the digital divide and achieve digital development in line with the SDGs.

2.4 Enhancing Digital Inclusion and Ensuring Equitable Access to Services (Implementation Stage)

Digital transformation facilitates implementation. Examples include:

- The **Giga** initiative, operating in more than **19 countries**, which identified **1.1 million schools** for connectivity across **50 countries** and connected **59,000 schools**, accelerating school connectivity efforts.
- Strengthening women's leadership in digital transformation through the "**Women's Network**" initiative, as well as the "**African Girls Can Code**" initiative.

2.5 Strengthening International Cooperation and Partnerships to Finance Policies (Implementation and Evaluation)

This aims to exchange expertise, evaluate policies, and increase funding among countries. Examples include:

- Mobilizing cooperation and partnerships among civil society organizations, the private sector, and governments, resulting in more than **500 pledges** worth **USD 29 billion** in investment commitments for access and digital transformation, through launching an online pledge platform for the **Partner2Connect** initiative and issuing a self-reporting model to accelerate digital transformation in Africa.
- Signing with **44 countries** on the **Harmonized Calculation Method for Africa (HCM4A)**, and completing technical assistance related to the **National Table of Frequency Allocations (NTFA)** provided to **South Sudan**.

Axis Three: Selected Experiences of Arab Countries in Applying Digital Transformation in Their Public Policies

1. Kingdom of Saudi Arabia

The Kingdom of Saudi Arabia has adopted digital transformation across many sectors and has developed goals and plans to implement it in practice. The first plan covered **2006–2010**, the second **2012–2016**, and the third from **2019 to 2022**. A decision was issued by the Council of Ministers (**No. 418**, dated **25/07/1442 AH**) approving the establishment of a **Digital Government Authority**, aimed at improving digital performance within government entities. This is intended to accelerate the collection of clear, accurate data and information, thereby increasing transparency and public

participation and ultimately achieving citizen satisfaction. All of this supports the Kingdom's progress toward the **Sustainable Development Plan 2030** (Al-Awadhi, Sarah Mohammed, n.d.).

Saudi Arabia, the UAE, and Bahrain have led the Arab region in digital government development. Saudi Arabia's ranking in the **UN E-Government Development Index** rose from **52nd in 2019** to **6th in 2024**, due to government policies and joint initiatives and research that invested **USD 25 billion in 2025** in digital infrastructure, cloud computing, and artificial intelligence. Open data capacity increased by an estimated **42% in 2023**, reaching **290.5 megawatts**, and the Kingdom's infrastructure became ready to absorb rising demand for cloud services and smart applications. Internet penetration also rose to **99%**, contributing to the creation of more than **381,000 jobs** to develop human capital—reflecting the depth of digital transformation in the Kingdom (Arab Federation for the Digital Economy, 2025).

The most prominent areas have included **digital health, e-learning, smart cities, and digital commerce**. The most notable transformation programs adopted by Saudi Arabia that influence public policies include:

- Upgrading healthcare through advanced digital programs and AI applications.
- Ensuring continuity of vital resources through technological solutions.
- Strengthening social development and developing the non-profit sector.
- Enabling segments of society to enter the labor market and increasing its attractiveness through digital training programs.
- Developing the tourism sector and national heritage through digital platforms.

To achieve leadership in digital transformation, the Kingdom launched many projects to improve performance efficiency, such as:

- The satellite-based encroachment monitoring project “**Ain Al-Saqr**”, aimed at detecting violations and ensuring continuous and periodic monitoring through satellites and drones.
- The **Command and Control Center** project, which aims to establish a joint operations center and integrated crisis and disaster management using live transmission technologies from the event site to decision-makers.
- The **Digital Telephones** project, which seeks a comprehensive upgrade of telephony systems, converting them into digital phones and reducing billing costs (Al-Awadhi, Sarah Mohammed, n.d.).
- The **Etimad** program, considered the first financial platform in the region for electronically connecting transactions, dealing with **450 government entities**.
- The **Hajj Hackathon**, regarded as the largest challenge in the Middle East, aimed at attracting leading minds in programming and innovative technical solutions to

improve the Hajj season (Diban Al-Harbi & Ali Al-Rabghi, 2025).

2. United Arab Emirates

In the UAE, digital transformation has been adopted in a balanced manner. A **virtual assistant** was integrated into the identity and citizenship portal to enable citizens to issue ID cards and renew residence permits through an interactive dialogue supported by voice recognition, with instant digital payment and back-end security screening systems.

The UAE also established a digital platform that facilitates access to key digital services across sectors such as education, health, justice, investment and construction, pensions, employment, community affairs, and others—24/7. The platform relies on registration via **digital identity** or downloading smart applications to access services through mobile phones, meeting users' needs anywhere in the UAE and at any time (UAE Electronic Platform, n.d.). In addition, the UAE developed its national AI model, becoming among the first Arab countries to rely on artificial intelligence.

3. Arab Republic of Egypt

Egypt has strongly embraced digital transformation and innovation to achieve its **Sustainable Development Vision 2030**, through digitizing both government and private services to help combat corruption and bureaucracy. For example, in the transport sector, the “**Uber Bus**” application has been used as an alternative to public transport by enabling users to book bus trips anytime and anywhere at fixed prices, to address various challenges facing this sector.

4. Algeria

Algeria has pursued digital transformation for several years across multiple fields, such as smart agriculture, e-health, financial services, the justice sector, e-learning, tourism, and others. To accelerate digital transformation across public policies, it approved the **National Digitalization Strategy 2025/2030**. This strategy reflects a deep understanding of challenges and opportunities in both national and international contexts, aiming to make Algeria a continental leader in digital transformation while adhering to ethical standards such as equality and transparency, etc.

This has been supported by establishing the “**High Commission for Digitalization**” as a supreme body to implement the strategy (High Commission for Digitalization, 2024, p. 9). This body serves as the primary reference for realizing digital transformation in Algeria, reinforcing Algeria's role as a regional driver of digital transformation to achieve the **Sustainable Development Goals 2030**. This was affirmed in **Midrand, South Africa**, during a high-level workshop on “Digital Transformation and Innovation Ecosystems to Accelerate Integrated Development in Africa,” which highlighted that Algeria's digital transformation falls within the framework of its digital strategy aimed at making Algeria a key engine for economic diversification, job creation, and strengthening its domestic and international standing.

The National Strategy for Digital Transformation focuses on five pillars (High Commission for Digitalization, 2024, pp. 14–20):

1. Core ICT infrastructure.
2. Focusing on developing employees and human resources.
3. Digital governance.
4. Digital economy.
5. Digital society.

The strategy rests on two foundations: the **legal and regulatory framework** and **information security** (High Commission for Digitalization, 2024, p. 21):

- Preparing a comprehensive law regulating digitalization in Algeria and ensuring faster transformation.
- Adapting and harmonizing existing legal texts with the provisions of the new law.

Regarding partnerships, a cooperation agreement was signed between the **Centre for Research in Applied Economics for Development (CREAD)** and the **University of Continuing Education** to develop training programs linked to economic development.

In **2025**, Algeria became the **capital of the African economy**, hosting several agreements aimed at making Africa a more integrated and effective continent within the international environment. Approximately **44% of investment contracts** were activated, particularly in the fields of **digital transformation** and **artificial intelligence**.

Axis Four: Key Proposed Solutions to the Challenges Facing Digital Transformation and Enhancing Its Benefits

Despite the initiatives and progress achieved by some Arab countries—especially Saudi Arabia, Qatar, and the United Arab Emirates—most countries still face a range of challenges. These can be outlined as follows:

1. Challenges

Among the most significant challenges facing digital transformation in public policymaking are:

- **Weak funding and investment in digital transformation:**
Insufficient funding hinders the digital transformation process, especially given how rapidly this field is advancing in developed countries.
- **Resistance to change:**
Innovation and information technology, coupled with citizens' direct participation in articulating demands to government and decision-makers without intermediaries, may be perceived as disruptive by some administrative staff and managers, as they

compel organizations to move beyond traditional comfort zones and bureaucratic routines. Moreover, insufficient competencies in certain sectors and the lack of training to support rapid digital transformation often contribute to resistance to change (Mohammed, p. 1227). In developed countries, efforts focus not only on educating employees and senior administrators, but also on spreading digital knowledge to the wider public. For example, Australia launched the “**Be Connected**” initiative to improve digital literacy among older adults.

- **The digital divide:**

One of the key challenges is the gap between urban areas and remote/rural areas. This affects public policymaking, especially in terms of ensuring that the concerns and problems of those regions reach decision-makers.

- **Weak digital infrastructure:**

This challenge is widely regarded as a key impediment to digital transformation. According to the United Nations (2024), most Arab countries continue to score below the global average on the Digital Infrastructure Index. By contrast, several advanced economies have implemented integrated national solutions to strengthen security and improve digital efficiency; for instance, Singapore established a unified “Government on the Cloud” platform to support secure, streamlined public-sector digital services.

- **Governance and regulatory framework challenges:**

Many Arab countries struggle because their laws have not kept pace with digital transformation. They have not sufficiently updated legislation or developed comprehensive national strategies to support digital transformation and AI, protect citizens’ personal data, and regulate cybersecurity-related data. By comparison, South Korea implemented a “**Zero Trust**” strategy as part of its national cybersecurity strategy.

Regarding African countries, digital transformation is present in only **10** African Union countries out of **55**, reflecting the fragility of the legislative and regulatory environment. According to a statement by Algeria’s Minister of Foreign Affairs, the National Community Abroad, and African Affairs, **Ahmed Attaf**, during the **80th session of the UN General Assembly / Security Council**, AI is no longer merely a technical tool but has become a decisive geostrategic factor reshaping the balance of power internationally. It is a double-edged sword with ethical, legal, and security challenges: it can either build capabilities and support sustainable development, or destabilize and undermine peace and threaten collective security. While many countries have risen to the challenge through intensive efforts to digitize and embed digital transformation in their policies, Africa adopts partnerships yet firmly refuses to be used as a testing ground for developing these technologies—especially in the military domain. (B, 2025).

2. Key Proposed Solutions

- **Enhancing cooperation among countries in digital transformation:**

This cooperation enables countries to fill gaps, exchange expertise and knowledge, and collaborate in financing. In 2022, the sixth version of the Internet Protocol (IPv6) and the **Internet of Things (IoT)** in the Arab region was highlighted by the Regional Experts Center. The goal was to implement a capacity-building strategy in IPv6 and IoT and support four countries in developing national IPv6 strategies.

- **A national emergency telecommunications plan for Palestine.**

- **Training 1,000 children in Jordan in digital financial literacy**, in cooperation with Saudi Arabia, as part of the “Mali” project.

- **Jordan’s cooperation with the World Health Organization** to develop its national strategy in digital health.

- **Collaboration among stakeholders in Egypt, Algeria, and Saudi Arabia** with regional activities of the **GovStack** initiative.

- **Cooperation between Tunisia and the German Agency for International Cooperation (GIZ)** in a project focusing on digital skills and digital infrastructure.

- In **Morocco**, the launch of a **Child Online Protection** project to disseminate guidelines for protecting children online, alongside capacity-building activities for all ICT users.

- The **UAE’s support to several countries in developing cybersecurity strategies** through a regional workshop (International Telecommunication Union (ITU), 2022).

Conclusion

This study has shown that digital transformation in Arab countries has made significant progress in developing public policies and addressing their shortcomings, particularly by providing reliable and accurate data. This has helped bring government closer to citizens, who have increasingly been able to participate and advocate for their demands through participatory digital platforms that enable direct communication with decision-makers and key officials. This approach enhances the speed of transmitting demands, improves data accuracy, and limits falsification and misinformation, thereby strengthening transparency and participatory governance.

Nevertheless, most Arab countries still face a range of challenges, including weak legislation regulating the use of digital transformation and its technologies, as well as insufficient funding, which has negatively affected digital infrastructure. The digital divide has also widened between urban areas—where internet access is more widespread—and rural or remote regions. In addition, there are challenges related to policymakers themselves, many of whom remain hesitant to rely on digital transformation in decision-

making due to limited capacity to use and benefit from these technologies.

To achieve sound policymaking, support and accelerate digital transformation across all stages of public policy, and overcome these challenges, decision-makers must demonstrate genuine political will to develop their countries and keep pace with digital progress through comprehensive national strategies based on the following:

- Establishing strict legislative frameworks to regulate the use of digital transformation and protect the personal data of both citizens and government institutions.
- Developing human resources digitally, including skills related to artificial intelligence applications, to foster a culture of innovation and flexibility within public institutions.
- Strengthening digital funding by supporting self-donation platforms among Arab countries and attracting governmental and non-governmental grants and aid directed toward digital transformation.
- Deepening international digital cooperation—whether in legislation, financing, information exchange, or cybersecurity—to ensure the quality and effectiveness of policies and to achieve digital development across all sectors toward sustainable development.

Adopting and benefiting from these proposals will help Arab countries overcome various challenges and build a better digital future.

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