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THE ROLE OF STRUCTURAL CONDITIONS IN THE SOCIETY

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BOOK REVIEW

Máté Szabó

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INTRODUCTION

of the editor-in-chief

The reader is holding the second volume of the 27th year of the **CEPSR**. We founded the **Central European Political Science Review** in 2000—ten years after the first free elections in Central Europe—believing that the region had accumulated a sufficient body of professional knowledge and social science scholarship to make the publication of a regionally oriented journal both feasible and necessary. At that time, we also committed ourselves to bridging the gap between the eastern and western halves of Europe—divided for decades—in order to foster scholarly dialogue, mutual understanding, the exchange of research findings, and, more broadly, learning and the strengthening of democratic political culture. Looking back now, we can say that the journal has fulfilled its historic mission and is making significant strides in fostering tolerance and building the pillars of democracy.

Today, with the growing role of cyberspace, we are confronted with a series of qualitatively new phenomena. We believe that—regardless of what kind of power-related ferment or even “patrician revolt” originating from the ramparts of power might occur in democracies in the future—success and a genuine shift in power can only be achieved if the new force—the society mobilized within the “online space”—is taken into account. This is a distinctive, “culturally proletarian” stratum capable of absorbing little more than slogans and one-word messages; yet, its political mobilization and easily manipulated electoral preferences could trigger a transformation in public life and existing political and party structures comparable to the impact of the expansion of suffrage in the post-World War I era.

In our view, intellectuals—the “men of letters”—will play a pivotal role in the first half of the 21st century in ensuring that this process does not lead to the rise of “leader-democracies” and dictatorships, but instead fosters the humanization of democracies. Let us, therefore, consider whether the intelligentsia of our time is prepared for this epochal task.

Can we in Europe avoid the “treason of the intellectuals”—that very danger against which the great humanist writers Julien Benda and Mihály Babits warned us a century ago?

Today, we regard this as the primary objective of the Central European Political Science Review!

János Simon

Founding editor-in-chief
(since 2000)

THE ROLE OF STRUCTURAL CONDITIONS IN THE SOCIETY

**R. King Merton's New York Lectures:
Between General Sociology
and the Sociology of Law**

Introduction

This essay aims to reconstruct, in a systematic manner, the theoretical and methodological framework of Robert King Merton's work. A comparative assessment, carried out on a discipline-by-discipline basis, would suggest that Merton does not hold a pre-eminent position compared with some of his contemporaries and predecessors: as a general social theorist, a comparison with Emile Durkheim, Pitirim A. Sorokin or Niklas Luhmann does not entirely favour him; as a methodologist and empirical researcher, his closest collaborator at Columbia University's Bureau of Applied Social Research, Paul F. Lazarsfeld, likely demonstrated technical superiority; as a shaper of science policy and academic organization, Talcott Parsons, Merton's colleague and, in many respects, his polemical counterpart, exercised a disciplinary hegemony whose problematic implications remain, in part, detectable even today in contemporary theoretical debate; finally, as a populariser, Peter L. Berger likely enjoyed greater communicative agility and more immediate success with a non-specialist audience.

Nevertheless, the absence of any disciplinary primacy is precisely what accounts for Merton's intellectual stature; he stands out as a figure of exceptional prominence within the disciplinary landscape of his time not by virtue of excellence in a single field of expertise, but by virtue of his ability, rare and in many respects unique in the history of the discipline, to perform at a high level all the constituent functions of sociological work: theoretical, methodological, empirical, popularising, concerning the philosophy of science and, in a broader sense, organizational and entrepreneurial with regard to scientific culture, integrating them into a unified, comprehensive research programme. Within this multidimensional perspective, the lectures reconstructed here take on exemplary significance for understanding what, strictly speaking, constitutes the work of the sociologist or, more generally, of the social scientist.

Other disciplinary traditions have viewed the sociologist, sometimes even unwittingly, as a variant of the social philosopher; others, with a more markedly empiricist orientation, as a variant of the statistician applied to the human sciences. Merton is perhaps the only scholar to have reconstituted, and given it a systematic form, that unitas multiplex of sociological work which earned him the nickname “Mr Sociology”.

The essay is divided into eleven lectures, organised in an order that progresses from the more specifically theoretical categories (deviance, the distinction between fruitful and sterile ignorance, the relationship between knowledge and opinion, the notion of a paradigm) to those that are more strictly historical-epistemological (the sociology of science, the theory of the medium range, anomie and white-collar crime, serendipity, the comparison between European and North American traditions, and the relationship between falsificationism, the scientific revolution and historical cumulativeness). This is neither an intellectual biography nor an introductory textbook, but a reasoned reconstruction, based on primary and secondary literature on Robert King Merton published in various languages from 1949, the year *Social Theory and Social Structure* was published, to the present day.

A preliminary methodological clarification, seemingly minor but of non-negligible importance, concerns the criteria followed in the bibliographic survey. The term “Merton” alone is liable to generate ambiguity regarding attribution, as it appears in academic literature and bibliographic indexes also in reference to authors of the same name active in disciplinary fields entirely distinct from sociology. In the search for primary and secondary sources, conducted in English, Italian, French, German, Spanish, Polish and other languages into which Merton’s work has been translated or discussed, the full form, Robert K. Merton or Robert King Merton, was therefore systematically adopted, avoiding the abbreviated form “Robert Merton”, in order to prevent any ambiguity regarding attribution. This is a precaution that Merton himself, who, throughout his career, was constantly attentive to the semantic precision of the categories he employed, as demonstrated, for example, by the lexical history of the concept of “serendipity” reconstructed in point 9, would likely have appreciated.

1. The deviant as innovator vs. the deviant as a drifter towards crime

The first lecture concerns Merton's theory of deviance, first formulated in the famous article "Social Structure and Anomie", published in the "American Sociological Review" in 1938 and subsequently completely revised and expanded in the 1949, 1957 and 1968 editions of "Social Theory and Social Structure" (Merton, 1938; 1949; 1957). Building on and radically transforming Durkheim's concept of anomie, Merton no longer understands it as a mere absence of norms, but as a structural disjunction between cultural goals, primarily economic success, and the institutionally available means to achieve them. This structural tension gives rise to five typical modes of individual adaptation: conformism, innovation, ritualism, retreatism and rebellion (Merton, 1938).

The key focus of the first lecture is the category of innovation. The Mertonian innovator is neither a pathological individual nor a renegade from mainstream culture: they are someone who fully accepts legitimate goals, success, recognition, social mobility, but who, lacking adequate institutional means to achieve them, substitutes "technically effective" means for legitimate ones, even when these are illegitimate or criminal (Merton, 1938: 676; Stoltz, 2023). In this interpretation, economic crime, corruption and "getting by" on the fringes of legality are not signs of a break with dominant values but, paradoxically, a form of hyper-conformity to them: the innovator believes in the collective dream more than those who already possess the means to realise it legally.

It is essential to distinguish this figure from the pure and simple drift towards crime, which belongs rather to the categories of degenerate ritualism or renunciation: individuals who have ceased to believe in the ends or the means, or both, and who merely survive on the fringes of the social system, often through addiction, social withdrawal or individual anomie closer to the Durkheimian sense of the term. Criminal "drift through abandonment" is therefore sociologically distinct from, and less interesting from a theoretical perspective than, Mertonian innovation, which remains probably the most fruitful and widely cited contribution, internationally, from North American criminology to European sociology of deviance, to the entire framework on anomie (Featherstone and Deflem, 2003; Agnew, 1985; 2002).

The interpretative influence of Merton's concept of innovation did not end in the 1960s and 1970s, when the model was at the center of the structural-functionalist debate: it was taken up and variously reinterpreted in terms of general strain theory by Robert Agnew, who broadened its scope to include not only the strain associated with the failure to achieve positive goals, but also that linked to the removal of positive stimuli or the imposition of negative stimuli (Agnew, 1985; 2002). This extension confirms, once again, the generative capacity of Merton's medium-range theories (point 7): formulated to address a specific problem, they remain sufficiently open to be rearticulated by subsequent generations of researchers without losing their underlying conceptual identity.

2. Fruitful ignorance vs. sterile ignorance

The second lesson is less well known to the general public but equally revealing of Merton's intellectual style. On several occasions, from his writings on the sociology of knowledge to more autobiographical essays such as "A Life of Learning" (Merton, 1994), he implicitly distinguishes between two forms of not-knowing: a fruitful ignorance, which acts as the driving force behind research because it is recognised, acknowledged and made the subject of inquiry; and a sterile ignorance, which instead masquerades as knowledge, closes in on itself and blocks, rather than stimulates, the process of discovery.

Fertile ignorance is that of the researcher who knows that they do not know and who transforms this gap into a research programme: it is the same logic that underpins, as will be discussed in greater detail in point 9, the pattern of serendipity, that is, the unexpected, anomalous and strategic finding that exerts pressure on the investigator to pursue a new direction of inquiry capable of extending or correcting existing theory (Merton and Barber, 2004 [1958]). Such ignorance is not that of the incompetent, but a methodical, disciplined state: the researcher deliberately constructs areas of open-ended inquiry, catalogues them, makes them visible to the scientific community and turns them into the focus of further work.

Sterile ignorance, on the other hand, is that which masquerades as competence: the cliché repeated with confidence, the disciplinary prejudice never questioned, the opinion that feeds on itself without ever being confronted with anomalous data. This second form of non-knowledge is, in Merton's conception, closely linked

to the theme of the next lecture: the difference between scientific knowledge and public opinion. Sterile ignorance, in fact, tends to thrive precisely where codified knowledge gives way to self-referential discourse, devoid of mechanisms for falsification or empirical verification.

3. Knowledge vs. public opinion

The third lecture concerns the distinction, which Merton regards as decisive, between scientific knowledge and public opinion. From his earliest writings on the sociology of knowledge in the 1940s, which were later brought together in the third volume of the Italian edition of *Theory and Social Structure*, dedicated precisely to *The Sociology of Knowledge and the Sociology of Science* (Merton, 2000 [1949–1968]), Merton has insisted that scientific knowledge is distinguished from other forms of social belief not by its infallibility, but by the presence of an institutional apparatus for intersubjective verification: the scientific community, its peer-review mechanisms, and its systems of reputation and sanctions.

Public opinion, by contrast, circulates according to the logic of social plausibility, the perceived authority of the source, and conformity to the consensus of the reference group: it is the terrain on which the self-fulfilling prophecy can flourish, one of the most successful and widely translated concepts in Merton's entire body of work, coined in his 1948 article in the *Antioch Review* and later revisited in “*Social Theory and Social Structure*” (Merton, 1948; 1949). The self-fulfilling prophecy demonstrates how an initial false definition of a situation can, through the behaviour it itself induces, transform into a new social reality: the paradigmatic case, discussed by Merton, is that of a bank run triggered by the mere spread of a rumour, false at the time it was circulated, regarding a bank's insolvency.

Scientific knowledge, on the other hand, has mechanisms specifically designed to correct this kind of deviation: empirical verification, replication, and peer review. For Merton, the distinction between knowledge and opinion is therefore not a distinction of content, but a distinction of institutional process: what makes a statement scientific rather than merely a matter of opinion is the type of social scrutiny to which it is subjected. This is a point that Merton will develop systematically in his studies on the sociology of science, examined in section 6.

4. Paradigm vs. discourse

The fourth lesson concerns how Merton uses the notion of paradigm, which is clearly distinguished from what we might define, in more contemporary terms, as “discourse”. Merton is no stranger to the genealogy of the term “paradigm”: his correspondence and intellectual exchanges with Thomas S. Kuhn in the years leading up to the publication of “The Structure of Scientific Revolutions” (1962) have been reconstructed by recent studies, which show how Merton's sociological frameworks provided Kuhn with a lens through which to conceptualise scientific communities and their norms, whilst Kuhn's conceptual innovations in turn steered Merton's attention in new directions (Sher, 2026). A conceptually similar contribution, that of the “thought collective” (Denkkollektiv), had already been anticipated in the 1930s by the Polish physician and biologist Ludwik Fleck, often cited as a precursor to both Kuhn and, to some extent, Foucault (Ptitsyna, 2026).

4.1 Paradigm and Falsificationism

For Merton, the paradigm, and in particular what the literature has termed the “Mertonian paradigm” of the norms of science, first articulated in his 1942 essay on science and democratic social order and then systematically revisited in “The Sociology of Science” (1973), is never a closed dogma, but a conceptual structure open to empirical falsification (Wikipedia, Mertonian norms; Merton, 1942/1973). The four institutional imperatives of the scientific ethos, communism (or communalism) of knowledge, universalism, disinterest and organised scepticism, function as a normative framework that guides research, but which remains constantly subject to scrutiny by the data: this is the principle whereby no scientific claim is, in principle, exempt from intersubjective empirical scrutiny.

In this sense, the Mertonian paradigm is engaged in a close, though not always explicit, dialogue with Popperian falsificationism: whereas Kuhn, in his famous account, emphasises how, within “normal science”, paradigms are dogmatically shielded from criticism, the Mertonian approach maintains a more explicit commitment to the possibility, indeed, the institutional duty, of subjecting every scientific claim to rigorous testing (Musgrave; Popper, Kuhn, Lakatos and Aim-Oriented Empiricism). For Merton, therefore, the paradigm is not a barrier protecting the theory from falsification, but a tool that makes falsification itself possible by organising it.

4.2 Discourse as the autopoiesis of sterile ignorance

Whilst the paradigm, in the Mertonian sense, is structurally open to verification and self-correction, “discourse”, in the sense in which the term has been used by a strand of the post-structuralist tradition and subsequently popularised in contemporary media and political discourse, tends instead to function as a self-referential system: it self-generates, self-legitimises and, in its most degenerate form, feeds upon itself independently of any constraints of reality. Here, the second lesson (fruitful ignorance vs. sterile ignorance) and the third (knowledge vs. opinion) converge into a more general synthesis: self-referential discourse is the social form par excellence in which sterile ignorance finds its autopoiesis, that is, its capacity to reproduce itself without any contact with external empirical verification.

The term “autopoiesis” does not belong to Merton's original lexicon, but derives from the theoretical biology of Humberto Maturana and Francisco Varela and from its subsequent sociological transposition, carried out primarily by Niklas Luhmann. However, reading Merton's distinction between the scientific paradigm and self-referential discourse retrospectively in the light of this concept allows us to grasp more precisely why Merton always advocated, for the sociology of science, a more epistemologically robust status than that of a mere “sociology of ideas”: the Mertonian scientific paradigm is an open system, subject to continuous empirical perturbations; discourse, on the other hand, when it becomes self-contained, becomes a closed system that produces only its own presuppositions.

5. The contribution of the Mertonian paradigm: from structuralism to functionalism

The fifth lecture concerns Merton's theoretical trajectory from structuralism, in the sense, here, of a constant focus on social structure as a system of positions and objective constraints, to functionalism, of which Merton is considered, alongside Parsons, one of the leading exponents of twentieth-century American sociology. Merton's specific contribution to functionalism, however, is far from an uncritical adherence to Parsonsian functionalism: it is rather a radical internal revision of it, set out in the famous methodological chapter of “Social Theory and Social Structure” devoted to “paradigms for functional analysis” (Merton, 1949; 1957).

There are three main focal points of this revision. First, the distinction between manifest and latent functions: a single social practice may have consequences that are declared and recognised by the actors (manifest) and consequences that are unintended, unrecognised, but nonetheless objectively detectable (latent). Second, the critique of the three postulates of “naive” functionalism, the functional unity of society, the functional universality of every cultural element, and the functional indispensability of every institution, which Merton judges to be empirically untenable in their absolute form: a single function can be performed by functionally equivalent institutions (functional equivalents), and the same cultural element may prove dysfunctional for certain subgroups and functional for others. Thirdly, the introduction of the concept of dysfunction, which breaks with the implicit harmonism of Parsonsian structural functionalism and opens the door to an analysis of conflict and social tension within the system.

In this sense, Merton undertakes an approach that we might define as critical functionalism or, as the international success of his work has shown, “medium-range” functionalism: he does not abandon the structural legacy of Durkheim and the systemic framework inherited in part from Parsons, but subjects them to a methodological scrutiny that renders them compatible with empirical research and with the observation of social change and conflict.

6. The founding of the sociology of science and the Matthew effect

The sixth lecture concerns what is probably Merton’s most original and enduring contribution: the founding of the sociology of science as an autonomous disciplinary field. As early as his doctoral thesis, “Science, Technology and Society in Seventeenth-Century England” (Merton, 1938), Merton identified in the Puritan ethos and in the economic and technological transformations of seventeenth-century England certain social preconditions for the institutionalisation of modern science (the so-called “Merton thesis”). But it was above all from the 1940s onwards, with his essay on the normative structure of science, that Merton developed the conceptual core of the discipline: science as a social system endowed with its own institutional ethos, communism, universalism, disinterestedness, organised scepticism, and its own system of rewards, distinct from but intertwined with the system of scientific communication (Merton, 1942; 1973).

The Matthew Effect belongs to this same framework, as formulated in the article of the same name published in “Science” in 1968 (Merton, 1968). Drawing on the Gospel passage stating that “to everyone who has, more will be given, and they will have an abundance; but from the one who has nothing, even what they have will be taken away” (Matthew 25:29), Merton describes the mechanism whereby, in the case of multiple independent discoveries or collaborations between scientists of differing status, credit tends to accrue disproportionately to the already eminent scientist, to the detriment of their less well-known collaborators. This effect, originally formulated in terms of the reward system, was subsequently reformulated by Merton himself, in a later essay, in terms of the system of scientific communication: the name of an already established scientist increases the visibility of a contribution, whilst the same contribution, authored by a lesser-known scientist, risks remaining invisible (Merton, 1968; 1988, reprinted in Merton, “The Sociology of Science”, edited by N. W. Storer, 1973, chapter 20).

The Matthew Effect is today one of the most vital Mertonian concepts in contemporary research, extending well beyond the original scope of the sociology of science: it has been used to analyse the cumulative effect of the impact factor of scientific journals (Lariviere and Gingras, 2010), citation dynamics in new algorithmic recommendation systems, including generative artificial intelligence that tends to favour articles and journals that are already more frequently cited (recent studies on the amplification of the Matthew effect by linguistic models, 2025–2026), and, more generally, phenomena of cumulative advantage in educational, economic and digital systems. This is one of the clearest demonstrations of the medium-term fruitfulness of Merton’s conceptualisation: devised to explain a specific and limited phenomenon, the distribution of scientific credit, it has proved capable of being generalised to a much broader class of phenomena involving cumulative inequality.

The empirical framework on which Merton bases the Matthew Effect is not merely anecdotal: it is largely based on interviews conducted by Harriet Zuckerman with US Nobel laureates in the early 1960s, compiled in her study “Scientific Elite” (1977) and already utilised by Merton as strategic research material, in the sense discussed in point 9, to observe “at scale” the dynamics of credit attribution that are otherwise difficult to discern in ordinary scientific research. This is a further example of how, within Merton’s

programme of work, the sociology of science is never purely speculative, but always anchored to a verifiable empirical basis, precisely the circularity between theory and empiricism referred to in point 7.

7. Middle-range theory and the circularity between theory and empiricism

The seventh lecture concerns perhaps Merton's best-known methodological contribution, namely "theories of the middle range". Merton explicitly defines them, in the first chapter of "Social Theory and Social Structure", as theories that lie "between the minor but necessary hypotheses generated in abundance in the course of day-to-day research, and the systematic attempts to develop a unified theory capable of explaining all the uniformities observed in social behaviour, social organization and social change" (Merton, 1949: 39; Italian translation in "Teoria e struttura sociale", vol. I). Medium-range theories are therefore specific enough to be subject to direct empirical testing, and at the same time general enough to be integrated into a broader conceptual framework.

This methodological choice is also, and above all, a polemical stance against two opposing yet symmetrical extremes: on the one hand, the Parsonsian-style "grand theory", accused by Merton of remaining too distant from empirical data to be falsifiable; on the other, crude empiricism, the accumulation of data without any theoretical framework capable of guiding its interpretation. Medium-range theories, the theories of deviance and anomie, reference group theory, the theory of the self-fulfilling prophecy, and the theory of the structure of science, all arise from specific empirical problems, but are formulated in such a way as to be extendable, testable and correlatable with other theories of a similar level.

The circular relationship between theory and empiricism is therefore, for Merton, not a provisional compromise pending a definitive general theory, but a permanent research programme: theory guides data collection; anomalous data (the pattern of serendipity, referred to in point 9) compel us to revise or extend the theory; and this, in turn, generates new testable hypotheses. It is a virtuous circle that explains why, unlike many "grand theories" of the twentieth century, Merton's framework has withstood almost a century of empirical research whilst remaining a living reference point, rather than a historiographical monument.

8. Merton's elaboration of Durkheim's concept of anomie and studies on bureaucracy and the potential for white-collar crime

The eighth lecture requires us to return, from a more specifically historical-conceptual perspective, to the relationship between Merton and Durkheim. Durkheim's concept of anomie, formulated primarily in "Le suicide" (1897), describes a state of collective normative deregulation, typical of phases of rapid social change (both in the sense of crisis and, paradoxically, in the sense of sudden economic growth), in which individual desires no longer find a shared limit in social norms. Merton adopts the term but radically shifts its analytical focus: it is not the absence of norms as such that generates anomie, but the specific structurally produced disjunction between emphasised cultural goals and the institutional means actually available to achieve them (Hilbert, 1989; Hilbert and Wright, 1979). This distinction has been defined in criminological literature as the shift from a theory of "social" anomie (Durkheim) to a theory of "strain", that is, structural tension (Merton).

On this basis, Merton developed, in parallel with his theory of deviance, a line of research on bureaucracy which, at first glance, may appear distant from the theme of anomie, but which is in fact a coherent extension of it. In his essay "Bureaucratic Structure and Personality" (1940), Merton describes how the Weberian bureaucratic organization, precisely at the moment when it maximises efficiency through impersonal rules, generates an unintended dysfunctional effect: "bureaucratic rigour" (bureaucratic ritualism), that is, an excessive adherence to procedures that becomes an end in itself, regardless of, and sometimes in contradiction to, the substantive objectives that the procedures are supposed to serve. The same case illustrates the distinction between manifest and latent functions discussed in point 5: the bureaucratic procedure has the manifest function of ensuring fairness and efficiency, but it can produce the latent function of stifling initiative and shifting the focus from the end to the means.

Finally, the intersection between the theory of anomie and the analysis of bureaucracy raises the question, once again of central importance today, of the potential criminogenic drift of "white-collar" crime (a term coined by Edwin H. Sutherland but developed in a strictly structural key by the Mertonian school of anomie). If deviant innovation, according to the argument discussed in point 1, is typical

of those who lack legitimate means to achieve legitimate goals, the extension of this framework to white-collar criminals shows that anomic pressure can also affect individuals with high social and economic status, when the goals, success, wealth, competitive success, are defined in relative terms and are therefore potentially unlimited: this is the theoretical basis upon which subsequent criminology (from Waring, Weisburd and Chayet, 1995, through to the most recent studies on financial and corporate fraud) has built much of its analysis of economic and organizational crime.

9. The sociology of science and serendipity

The ninth lecture concerns one of the most original, and in many respects most personal, contributions of Merton's entire body of work: the concept of serendipity. The term, coined in 1754 by Horace Walpole based on the Persian fable of the “three princes of Serendip”, was discovered by Merton in the Oxford English Dictionary in 1945 and adopted by him, first in an article published that same year and then in a paper presented to the American Sociological Society in March 1946, to define the “serendipity pattern”: the unexpected, anomalous and strategic observational finding that exerts pressure on the researcher to pursue a new direction of inquiry, capable of extending or correcting existing theory.

The publishing history of the concept is in itself instructive of Merton's method: the monograph “The Travels and Adventures of Serendipity”, written in collaboration with the historian Elinor Barber, was completed as early as 1958 but remained unpublished, tucked away in the author's drawers, for over forty years. It was first published, and this is a detail of great interest for an essay that pays close attention to sources in multiple languages, in Italian translation in 2002, under the title “Viaggi e avventure della Serendipity. Saggio di semantica sociologica e sociologia della scienza” (Merton and Barber, 2002); it was not until 2004, shortly after Merton's death (23 February 2003), that the text was published in its original language by Princeton University Press (Merton and Barber, 2004). The book is not merely a lexical history: it is a wide-ranging reflection on how new knowledge is produced, both in the sciences and in the humanities, and on the extent to which scientific discovery owes a debt to unplanned observations, provided they are encountered by a mind prepared to recognise their theoretical significance.

It is important not to confuse Mertonian serendipity with mere luck or blind chance: the very formula, an unexpected, anomalous and strategic finding, implies that the researcher must already possess a solid theoretical framework to recognise the anomaly as such, and sufficient intellectual openness not to dismiss it as mere background noise or a measurement error. It is in this sense that serendipity is directly linked to the lesson on fruitful ignorance (point 2) and to the circularity between theory and empiricism (point 7): the serendipitous finding acts as a hinge between the Mertonian paradigm's openness to falsification (point 4.1) and the actual, concrete practice of research, the very practice of which Merton offers a more informal and anecdotal portrait in the pages of "The Practice of Research" ("Fragments from a Sociologist's Notebook", also translated into Italian), in which the author discusses, amongst other things, the role of "strategic research materials" (SRM) in the history of the biological and social sciences, from Mendel's studies on peas to the genetics of bacteria, right through to the research on phages conducted by Delbruck and Luria.

In those same pages, Merton recalls, amongst the many examples of strategic research materials capable of making visible a phenomenon that would otherwise be too complex to observe directly, the case of his colleague, the neurobiologist Eric Kandel, and his work on the sea slug *Aplysia californica*: an organism whose nerve cells, being particularly large and accessible, have made it possible to study complex cognitive processes such as learning and memory at a molecular level, processes that would otherwise be difficult to isolate in more complex models. This anecdote, cited by Merton himself as an example of the "search for strategic materials" shared by the biological and social sciences, shows how the concept of serendipity is not confined to sociology alone, but describes a mechanism of discovery common to all empirical sciences: the non-random choice of an unusual but extremely "eloquent" object of observation ultimately constitutes another manifestation of the same serendipitous pattern.

10. European sociology of knowledge and sociology of public opinion: two radically different ways of understanding the relationship between knowledge and beliefs

The tenth lecture broadens the focus from a single Mertonian concept to a comparison of intellectual traditions. Merton, who was

educated in the United States but possessed a solid knowledge of the European tradition, from Durkheim to Max Scheler, from Karl Mannheim, about whom he wrote an essay as early as 1941 (“Karl Mannheim and the Sociology of Knowledge”), right through to Wilhelm Windelband and Heinrich Rickert, explicitly engages with European sociology of knowledge, in particular with the distinction, taken up by Rickert (1921), building on Windelband (1894), between *Naturwissenschaften* (natural sciences, oriented towards nomothetic generalisation) and *Geisteswissenschaften* (humanities or socio-cultural sciences, oriented towards the understanding of unique events).

European sociology of knowledge, in its classical form (Scheler, Mannheim), tends to emphasise the structural, and at times almost deterministic, relationship between the social position of the knowing subject and the content of their knowledge: knowledge is always, to some extent, situated, an expression of a class or group perspective. Merton, whilst recognising the value of this insight, subjects it to a more stringent empirical constraint: the relationship between social structure and cognitive content must be specified, operationalised and verified on a case-by-case basis, not assumed *a priori* as a general law. The shift echoes, after all, the same methodological move already observed in relation to functionalism (point 5), and one which generally distinguishes the Mertonian approach from any form of totalising theory.

The sociology of public opinion, which is more distinctly North American in character and linked to the work Merton carried out from the 1940s onwards at Columbia University’s Bureau of Applied Social Research, alongside Paul Lazarsfeld, operates on a different level: it no longer asks “where” a belief comes from socially, but how it is formed, circulates, is reinforced or dissolves in mass communicative interaction, through mechanisms such as the self-fulfilling prophecy (point 3), interpersonal influence (Merton, 1949) and mass persuasion (Merton, 1946). Whilst European sociology of knowledge examines the relationship between social being and thought in almost epistemological terms, Mertonian sociology of public opinion examines it in empirical-communicative terms: who speaks to whom, through which channels, and with what measurable effects on collective behaviour. These are two ways of understanding the relationship between knowledge and beliefs which, even today, remain largely incommunicable within their respective European and North American academic traditions; and for exactly this reason,

Merton, straddling both, was able to translate one into the terms of the other better than anyone else of his time.

11. Merton's approach to falsificationism, revolution and cumulativism in science: between systematics and history

The eleventh and final lecture summarises, in a sense, all the previous ones, as it concerns the way in which Merton conceives of scientific change itself. Here, the decisive comparison is once again with Thomas Kuhn, and with the model of scientific revolutions as discontinuous breaks between incommensurable paradigms. Merton, as we saw in point 4, shares Kuhn's focus on the social and communal dimension of science, but remains sceptical of a purely discontinuous model of scientific change: his sociology of science is rather geared towards identifying, within the undoubtedly existing discontinuities, the lines of cumulative continuity that allow scientific knowledge to accumulate over time. This is the profound meaning of the metaphor that gives its title to one of his most original books, "On the Shoulders of Giants: A Shandean Postscript" (Merton, 1965; *Sulle spalle dei giganti*, il Mulino, 1991), a reconstruction, carried out in a literary style decidedly unorthodox for an academic treatise, of the genealogy of the aphorism attributed to Newton about "seeing further by standing on the shoulders of giants".

This cumulativism is not naive: Merton is well aware, indeed, it is one of the most recurring themes in his sociology of science, that the cumulative process is itself fraught with tensions, conflicts of priority, multiple independent discoveries, dynamics of disproportionate credit (the Matthew effect, point 6) and mechanisms of selective oblivion which he defines as "obliteration by incorporation": a concept becomes so deeply embedded in the discipline's shared heritage that the memory of its original author is lost. The history of science, for Merton, is therefore a field that must be analysed on two levels: the systematic level, characteristic of the sociology of science in the strict sense, which identifies structural regularities in the processes of discovery, credit attribution and communication; and the historical level, characteristic of the historiography of science, which reconstructs particular cases in their irreducible specificity, precisely the distinction, discussed in point 10, between the nomothetic and the idiographic approaches.

Merton's distance from both pure Popperian falsificationism, too formal and ahistorical to grasp the social concreteness of scientific practice, and the pure Kuhnian model of revolutions, too discontinuous to account for the real cumulative continuity of scientific knowledge, becomes apparent precisely in this dual focus, both systematic and historical. Merton brings together falsifiability (point 4.1), historical cumulativism and an unwavering attention to the possibility of ruptures and revolutions within the scientific community: this is perhaps the highest synthesis of his entire programme of work, and it is also the reason why, almost a century after "Social Theory and Social Structure", his work continues to be read, translated and discussed in all languages in which sociology is practised.

12. Conclusions

The eleven lectures reconstructed here do not, of course, exhaust the work of Robert King Merton, but they outline its underlying structure: a sociology that brings together theory and empirical research, structure and function, deviance and conformity, codified knowledge and popular opinion, the scientific paradigm and the history of ideas. This capacity for multidimensional integration, rather than pre-eminence in a single sub-discipline, is precisely what justifies the nickname "Mr Sociology": not the greatest theorist, not the greatest methodologist, not the most skilful policy-maker, not the most brilliant populariser, but the man who was able, at a very high level, to be all these things together, transforming them into a coherent and communicable programme of work.

This, ultimately, is the lesson of lessons: Mertonian sociology is not a system to be accepted or rejected in its entirety, but a multi-level programme of work, a way of posing questions, of dealing with anomalous data, of distinguishing knowledge from opinion, and what is a falsifiable paradigm from what is self-referential discourse; and it remains available, and in many respects still largely unexplored, to anyone today who grapples, in whatever language, with the complexity of the social world.

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Beyond data Fetishism: Rethinking Datafication and Digital Platforms

1. Introduction

In 2017, *The Economist* ran the headline: “The world’s most valuable resource is no longer oil, but data.”² This metaphor is particularly effective in capturing the centrality that information and data have acquired in contemporary society. Yet, properly engaging with this theme requires grappling with a long-standing analytical tradition, one that traces back to the analysis of post-industrial society formulated between the late 1960s and early 1970s (Touraine, 1969; Bell, 1973). These early theoretical frameworks – remarkably prescient, given that they were developed prior to the advent of modern information technologies – already identified the rising importance of information as a driver of growth and profit. However, according to certain interpretations (Castells, 1994), they may have been too quick to declare the end of industrial society.

Some years later, Christopher Freeman (as cited in Castells, 1996, p. 70) would characterize these dynamics as a paradigm shift, one that had to be understood “as a shift from a technology based primarily on cheap inputs of energy to one predominantly based on cheap inputs of information derived from advances in microelectronic and telecommunications technology” (Dosi et al., 1988). While such theories can today be regarded as overly dismissive of the postwar industrial apparatus and capitalist organization, the subsequent political climate likewise redirected attention away from production toward informational dynamics.

The conclusion of the Cold War and the dissolution of the Soviet Union, especially in the West, reshaped public and political debate, closing a historical phase of confrontation between economic

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2 The world’s most valuable resource is no longer oil but data, in «The Economist», 06/05/2017.

models and inaugurating the idea of the “end of history” (Fukuyama, 1992). The profitability crisis of capital in the 1970s led, on the one hand, to outsourcing and relocation of production from older industrialized countries to regions with cheaper labor and raw materials (Brenner, 2006), and, on the other hand, to the dramatic expansion of financial markets and stock market speculation (Arrighi, 1994). Both tendencies weakened the perceived role of productive dynamics: the transfer of factories reinforced the narrative of deindustrialization, while the growing weight of finance sustained the illusion that capital could generate value independently of production. This shift was accompanied by a progressive redefinition of society as an ‘information society’, a ‘knowledge society’ and, eventually, a ‘digital society’ where the dematerialization of products, the rise of services, and the immaterial dimension collectively contributed to relocating the perceived source of wealth creation in capitalist societies away from production and into these new domains. In this theoretical framework, the growing significance of information was often interpreted as an alternative to traditional productive growth. Nonetheless, Castells (1994; 1996) conceptualized the “information society” in critical continuity with post-industrial theories, precisely to highlight that the new capitalism was not the end of industrialization but rather a restructuring of production processes in which information played an increasingly decisive role.

Castells’s reflections also serve as a bridge to contemporary debates. What he foresaw was that communication and information technologies were producing a “convergence of specific technologies into a highly integrated system” (Castells, 1996, p. 71). These systems today take the form of digital platforms.

The rise of digital platforms and their use of vast amounts of information brings us into the next stage of this development, one marked by the concepts of ‘big data’ (Delmastro & Nicita, 2019) and ‘infonomics’ (Laney, 2017) and, more broadly, by what has been described as a ‘data revolution’ (Kitchin, 2014). These frameworks prepared the ground for today’s vocabulary of ‘datafication’, in which every human and social interaction is translated into information, then into data, which can be stored, processed, and monetized. Around this process, a broad interdisciplinary and critical debate has developed on datafication, dataism, dataveillance, and the extraction, appropriation, and use of data (Kitchin, 2014; van Dijck, 2014; Iliadis & Russo, 2016; Couldry, Mejias, 2018).

As a result, scholarly attention to informational dynamics has increasingly been absorbed into research on data and platforms. ‘Platform capitalism’ (Srnicek, 2017) and ‘platform society’ (Van Dijck, Poell & de Waal, 2018) have emerged as key frameworks for analyzing a society in which information is fully digitized and concentrated within a small number of global platforms. Yet, despite clear analyses of the economic predominance of these digital platforms (Srnicek, 2017) and their social pervasiveness, the overwhelming focus on data risks obscuring the connections between the use of information, digital platforms, and global production and distribution chains. In this way, contemporary debates risk reproducing the very separation between information and production that Castells already warned against, and that Vallas and Schor (2020) summarize as the exclusion of the ‘platform economy’ from the ‘larger economy’.

This tendency can be found even in some of the more critical platform studies, which, though from different perspectives, emphasize the growing centrality of data in contemporary society. Interpretations such as Zuboff’s ‘surveillance capitalism’ (2015; 2019) or Fuchs’s theories of platform labor (2015a; 2015b) often assign data a central role which, if not balanced with other considerations, risks obscuring the role digital platforms play in the contemporary reorganization of capitalism (including production and distribution chains, digital markets, and value chains). To capture this tendency, the present article introduces the category of ‘data fetishism.’ The term is developed through a heuristic analogy with Marx’s notion of commodity fetishism, but this does not aim to confine the debate within a strictly Marxist or neo-Marxist framework. Rather, it is used to identify a specific feature of contemporary interpretations of data that attribute to them an immanent value and conceal their embeddedness in broader capitalist production, circulation and valorization processes. In this sense, data fetishism points to something more specific than *dataism*, which Santaella and Kaufman define as “the cult of data as the supreme source of understanding of the world” and as “an ideology or a new religion” (2021). Indeed, fetishism does not merely refer to an excessive trust in data, or to the predominant role attributed to them. Rather, it points to a form of concealment of social relations that is specific to the Marxian notion of fetishism (Marx, 1976).

The article is guided by the following research question: how can the category of data fetishism help reconnect the analysis of data

and digital platforms to the broader restructuring of capitalist production, circulation, and value chains?

The aim is, therefore, to advance the category of ‘data fetishism’ as a critical device for describing certain readings of datafication, showing how different manifestations of fetishism risk producing blind spots in understanding the interconnections between big data and value chains. In order to analyze how data fetishism emerges within the debate on datafication, two exemplary cases will be discussed: Zuboff’s theory of surveillance capitalism and Fuchs’s account of unpaid platform labor.

The paper is therefore situated within an epistemological debate on the study of digital platforms and on the interpretation of the role of data, proposing an interpretive and research framework that explicitly considers the role of data and digital platforms in connection with contemporary capitalist restructuring, situating this contribution within the line of research that calls for reconnecting the platform economy to the ‘larger economy’ (Vallas & Schor, 2020).

The structure of the article is as follows. Section 2 develops the analogy between commodity fetishism and data fetishism, fully defining this heuristic category. Sections 3 and 4 then critically examine two case studies: Zuboff’s theory of surveillance capitalism and Fuchs’s theory of unpaid platform labor, showing how both may be understood as expressions of data fetishism. Finally, Section 5 offers an interpretive framework for situating data and digital platforms in the contemporary context in ways that move beyond the fetishistic dimension of data.

2. Commodity fetishism and data fetishism

This article proposes the notion of ‘data fetishism’, drawing on Marx’s well-known concept of ‘commodity fetishism’, as an explanatory category to capture a tendency, present in a segment of the literature as well as in public opinion, to regard big data as the driving force of contemporary capitalism.

As in Marx’s analysis of fetishism, this tendency obscures the underlying social and productive relations, the broader dynamics of production, the division of labor, and the supply chains within which the extraction, processing, and valorization of data are situated. Data fetishism thus leads to a reading of society and capitalism that, while not necessarily denying the primacy of production in generating

social value, tends to take it for granted, while at the same time attributing to data an excessive autonomy. This results in an inversion of conceptual priorities in which data are interpreted as the engine of capitalist evolution rather than as its product; in which they are endowed with intrinsically valorizing qualities, rather than being understood as the outcome of a specific stage of capitalist development; and in which they are viewed as the origin of social inequalities, rather than as one of the forms through which such inequalities are expressed and consolidated.

This critique should not be taken as a denial of the crucial role that data and knowledge asymmetries play in today's platform capitalism, nor as a dismissal of the power dynamics deriving from the possession, or the absence, of particular capacities for processing and analyzing information. Nor is it intended to question the validity of earlier theoretical reflections on the 'information society' which, although formulated nearly three decades ago, continue to retain much of their analytical strength. Rather, precisely because data have become the focus of numerous theories on digital society, it is useful to introduce this reflection on the reversal of priorities and on fetishism, so as to avoid the illusion that humanity could be fed with packets of bytes.

The theoretical trajectory of interpreting the role of information in society, as we have seen, began even before the invention of personal computers. Today, however, reflecting on the role of information and data necessarily entails considering the infrastructural preeminence of digital platforms, which are virtually the only actors capable of collecting, storing, and processing the immense quantities of data currently available. These platforms alone possess the infrastructure, technology, and market position that allow them to operate at such scale, and they have become indispensable intermediaries for individuals, institutions, and governments alike (Van Dijck, Nieborg & Poell, 2019; Censi, 2025). In light of this, it is essential to recognize that the contemporary nature of information, in the form of data, is inextricably tied to the role and position of digital platforms within contemporary capitalism. The critique of data fetishism developed here is therefore intended precisely as a contribution in this direction, to show how the centrality attributed to big data often obscures the broader role of digital platforms in the restructuring of capitalism, and how the information they collect and process is directly embedded within the processes of capital valorization.

This also entails, in a certain sense, recovering, albeit in a renewed and critical form, some of Manuel Castells's insights on the relationship between information and production. Although Castells himself was criticized for a certain degree of unilateralism (Dijk, 1999), his interpretation consistently identified information as a fundamental, though never autonomous, component of the restructuring of contemporary society.

This perspective differs from other attempts to frame the social dynamics surrounding big data. I refer in particular to the contributions of Christian Fuchs (2016; 2017) – to which we shall return later – and of Miconi (2023). Both authors have used, albeit with different interpretations, the category of fetishism, offering important contributions to the analysis of information in the platform society. However, their work does not fully address – and indeed this was not their goal – the role of digital platforms in the capitalist reorganization of supply chains and the redefinition of the division of labor, limiting themselves instead to highlighting the social character of data production.

Indeed, a strand of critical scholarship has reached the conclusion that “the data sets that make up Big Data are always creations of human design, and thus are always implicated in social relations and power dynamics” (Sharon & Zandbergen, 2017). This observation marks a significant advance compared to conceptions that treat data as if they were natural or self-explanatory entities (Miconi, 2023), yet it still remains at the surface. By contrast, among those criticized by Miconi for conceiving data as raw material, we also find scholars such as Shoshana Zuboff, with her theory of surveillance capitalism, and Nick Couldry and Ulises Mejias, with their account of data colonialism, who have in fact placed strong emphasis on the power imbalances and social relations implied by data appropriation. To resolve this apparent contradiction, it is useful to further develop the analogy with commodity fetishism.

Marx, in speaking of fetishism, was certainly not merely emphasizing, in a quasi-humanist sense, *the people behind commodities* or the social relations behind the fetish. Rather, he underscored that the fetish acquires a specific value and role precisely because it is embedded within a *determinate* social relation of production. This is the key point of attention: *what type* of production relations are at stake, and *what kinds* of social relations are established among individuals, such that commodities acquire their fetishized form and appear to embody an inherent value. This question enables us to grasp,

at a deeper level, not simply that data is produced by human beings, but, returning to our starting point, how these data are inscribed within the social relation, and what the character of this relation is. In other words, what is the nature of the capitalist order in which data are embedded, and, correspondingly, what role digital platforms play in the ongoing restructuring of this order.

To clarify the tendency toward data fetishism and the framing of the problem as outlined above, two authors have been selected as paradigmatic examples: Shoshana Zuboff and Christian Fuchs. Both have reflected in remarkable ways on the role of data. Indeed, each, in different ways, has consciously highlighted the entanglement between data collection and the exercise of digital power, and analyzed the social relations underpinning them with acuity and significance. These considerations justify their selection over others. Nevertheless, I contend that even their analyses ultimately leave the door open to fetishistic interpretations.

3. Data as the new gold and digital platforms as Big Brother

The comparison of data to oil, to gold, or to a raw material awaiting extraction is a powerful metaphor, one that few have been able to resist. It appears, in different versions, in Srnicek (2017), Zuboff (2019), as well as in Couldry and Mejias (2019). Yet the very success of this metaphor lies not only in analytical force but also in rhetorical appeal. In fact, these authors have treated data not merely as a natural resource, but also as the outcome of a relationship between expropriators (platforms) and the expropriated (users).

In this section, drawing on Zuboff's theory, I show how such an approach risks turning into a fetishization of data. If data are conceived merely as a raw material, the task is simply to extract and exploit them. If, however, data are understood as a social product – the transformation of information into a means of capital valorization – then they are, in every sense, the outcome of a specific stage in the development of capitalism, and so too are the platforms themselves. It is this latter point, I argue, that Zuboff's framing tends to obscure.

Although Shoshana Zuboff is rightly recognized as one of the foremost critics of the digital society – particularly for her work on *surveillance capitalism* (2019)³ – her analysis of Google's rise and

³ For Zuboff, 'surveillance capitalism' represents the contemporary evolution of capitalism,

its early use of data risks detaching data from the broader context of production relations, opening the way to a subjectivist reading. She describes Google's use of data as a discovery, an insight, an invention, making the interpreters of social and economic change appear as its producers. Her reconstruction of the company's origins, while critical, still draws heavily on the founding myths of digital start-ups born out of nothing and driven forward by the brilliance of their founders. This is especially clear in her account of Google's decision to monetize data collection through user profiling as a discovery: "the discovery of behavioral surplus" (pp. 84–92). This passage raises two considerations.

First, the use of the term 'discovery' is closely linked to the conception of data as a raw material whose extraction and commercialization generate profit. In this interpretation, Google had effectively struck gold – or, more precisely, discovered how to exploit it. This framing leads to assign an intrinsic value to data. At this point, the fetishization of data has already occurred because data appear autonomous and inherently profitable. But data are not valuable in themselves. Information is transformed into data only if it can serve the processes of capital valorization. That is why market saturation, the profitability crisis, the just-in-time system, and the expansion of distribution chains are the necessary conditions so that data acquire the value they currently hold. This would not have been possible within a productive system based exclusively on mass production and hyper-productivity. In this sense, the value of data is as much a social product of capitalist evolution as the aforementioned transformations.

Furthermore, framing data extraction as a 'discovery' reinforces the rhetoric of entrepreneurial genius – even if presented in a critical light. The contemporary evolution of global capitalism is thus reduced to the intuition of a single company and the imitation of its business model by competitors: "Google invented and perfected surveillance capitalism in much the same way that a century ago General Motors invented and perfected managerial capitalism" (p. 19). Zuboff here appears to suggest that the global trajectory of capitalism follows the insights of the most innovative firms of each era. If data are understood as raw material and their use as the product of

one that grounds its profits in the exploitation of human experience – captured in the form of data – and imposes an instrumentalizing power that endangers democracy and freedom.

entrepreneurial genius, then the sociological explanation of how, at a certain stage of capitalist development, information was transformed into data and mobilized for capital valorization is lost. What remains is the depiction of a system of digital platforms cast in the image of Orwell's Big Brother.

The second consideration stemming from Zuboff's quote refers to the question of value generation in contemporary society. Zuboff argues that behavioral surplus constitutes the source of data's value, adopting an expression that explicitly echoes Marx's 'surplus value', while detaching it from the productive sphere. Implicitly, this suggests a displacement of the source of social value, from surplus value in industrial society to behavioral surplus in surveillance capitalism. But in doing so, the link between data and production is severed. Big data become crucial to capitalism precisely because they are embedded in manufacturing processes and, above all, in the commercialization and distribution of commodities. Information was already a commodity long before platforms; what is new is the massive and pervasive use of data, shaped by the productive and logistical requirements of the entire system.

As Evgeny Morozov (2019) observes, by sidelining production relations in explaining the digital society, Zuboff risks circular reasoning: "surveillance capitalists engage in surveillance capitalism because this is what the imperatives of surveillance capitalism demand" (ibid.). It is as if she had meticulously charted the features of digital surveillance, including its instrumental logics, without sufficiently interrogating its ultimate drivers, which extend beyond the interests of individual firms – even dominant ones – and encompass the broader evolution of capitalism itself. Zuboff (2015), by focusing on the novelty of data collection – while rightly stressing its private appropriation – ultimately frames this process as an alternative to the division of labor, rather than as its direct consequence, a substitution instead of an interpenetration: "This new division of learning becomes more salient than the traditional division of labor" (p. 76).

It is important, instead, to maintain the connection between data collection and the wider productive system. Data have acquired their current relevance precisely because of the international division of labor, with disparities between world regions in terms of consumption regimes and market saturation. Not all behavioral data are of equal value, since not all consumers have the same purchasing power or are served by equivalent supply chains. Moreover, not all

data are behavioral, yet all are managed by the same digital platforms to optimize systems of production and distribution – without which predictive or behavior-shaping analytics would have little or no economic significance. In short, data would be worth very little if there were no commodities to sell.

This may sound like an obvious conclusion, yet it is indispensable to explain the weight that the data economy and targeted advertising have acquired within total production costs. As mentioned before, these developments cannot be understood without linking them to the profitability crisis of Western economies (Brenner, 2006), the saturation of markets, and concurrent transformations in logistics chains.

This compels us to recognize the complexity of platform capitalism, in which mass surveillance represents *only one* of its defining features. Zuboff's dystopian portrayal of the digital society, framed in terms of the Big Other, generates an imaginary of digital totalitarianism that, much like other invocations of Orwell's Big Brother, ultimately underestimates the real pervasiveness of capital and platform domination by reducing it to the appropriation of data. In this data-centric vision, the social subject under ubiquitous surveillance is reduced to a generic "user," stripped of class, race, or nationality – an entity that is interclassist, interracial, and stateless. Such generalization retreats from a truly global reading of platform capitalism, functioning only if limited to certain parts of the 'Western' world. Behavioral data collection is only one aspect of platform power (Van Dijck, Nieborg & Poell, 2019), only one point of contact between platforms and individuals. A subject's social and economic position profoundly shapes the way they encounter digital control. In the world-system (Wallerstein, 2004), there are often class and ethnic divides between those who primarily occupy the position of consumers – targets of predictive advertising and customers of e-commerce platforms – and those who are involved in producing, shipping, and delivering goods, guided by the same algorithmic management of data. This phenomenon manifests both in the international division of labor and within individual countries, where ethnic and class-based separations are frequently reproduced. For immigrant workers, the experience of digital platforms is far more often one of labor relations than of data appropriation for consumption.

This limited identification of the victim of data subtraction is relevant because from it derives her conclusions about the 'right

to sanctuary’ and the prospect of confronting the ‘Big Other’, as she names the power of platforms. Zuboff does acknowledge the social relations inherent in data exploitation, yet her perspective confines them to a single dimension while overlooking others.

In this sense, Zuboff’s account of totalizing surveillance may suffer from the paradoxical flaw of not being totalizing enough. By failing to adequately situate data collection and instrumental power within the broader economic evolution of capitalism and global labor transformations, her framework leads to conclusions and forms of resistance – various strategies of concealment, both physical and digital, designed to evade platform tracking – that appear minor when set against the structural changes currently reshaping society.

4. Data as objectified labor

The second example of data fetishization considered here moves beyond analogies that equate data with natural resources such as gold or raw materials, instead orienting the analysis toward a reading that treats data as the expression of a working and productive relation. Yet even within these approaches – developed by authors associated with Italian autonomism or other Marxist perspectives (Fuchs, 2014; 2015; Fuchs & Mosco, 2017) – one can identify a certain form of data fetishism. These scholars attempt to link data extraction to Marx’s theorization of value production, but their interpretations are not entirely convincing. One of the most well-known is Fuchs’s theory of data as objectified labor. With this theory he seeks to overcome the identification of the user-consumer as the subjectivity of capitalist relations of data extraction, by reviving the notion of the ‘prosumer’ (Toffler, 1980). According to the modern interpretation of this concept, originally developed in the context of traditional media, users are simultaneously consumers and producers, because as recipients of advertising, they provide value to the sale of advertising space. In digital media, this value would derive from unrecognized and unpaid labor, thereby constituting an exploitative labor relation between platform-owning corporations and the users who engage with them. Indeed, users generate data through their online activity, whether voluntarily – by posting personal information or producing creative content on social media – or involuntarily – through behavioral data produced by their interactions and appropriated by platforms. Since such data are useful for profiling and targeted

advertising, Fuchs affirms that they increase the ‘relative surplus’ generated by advertising companies (Fuchs, 2014, p. 99). Therefore, they are a commodity whose value is derived partly from the labor of platform employees and partly from the labor of prosumers (ibid., p. 102). In this view, digital platforms profit from the exploitation of users’ unpaid labor, in a manner analogous to the classical Marxist theory of surplus value extraction from labor activity.

Yet, on closer inspection, although Marxist authors do not confine exploitation mechanisms exclusively to data extraction, they nevertheless engage in a *reductio ad data* when they theorize the self-sufficiency of infonomics in value production. As Alves (2021) argues, this reflects a “confusion between labor and human activity – not just work, but social praxis. [...] The difference between productive and unproductive work has not disappeared, although the line of demarcation between the two has blurred”. The fact that users’ data can be commodified – either directly sold or used as a basis for selling advertising space – does not mean that such data constitute labor in the Marxian sense or inherently embody value. A commodity can be exchanged without being the product of labor, as in the case of uncultivated land, mines, or forests, but also, more abstractly, the trade of privileges or advantages. More convincing, in this regard, is Huws’s (2014) interpretation, according to which platform profits are better explained as rents deriving from the possession of digital spaces: “The value that accrues to the social networking and search engine sites does indeed ultimately derive from surplus value produced by labor. But this is the labor of the workers who produced the commodities that are advertised on these sites, not the labor of the people who use the sites” (p. 161). In short, data acquire their immense value precisely because they are connected to a broader process of commodity production and circulation, which links their use and extraction to a wider process of social production.

Although Fuchs’s hypothesis of labor exploitation usefully re-centers attention on the concept of productive relations, it does so at the cost of blurring the definition of ‘labor’ and ‘worker’. Taken to its extreme, this line of reasoning coincides with the idea of a 24-hour working day (Smythe, 1981). According to this interpretation, individuals, beyond their conventional working hours, are continuously employed as prosumers and, even during sleep, reproduce labor power for capital. Such readings generate more

misunderstandings than insights and, ultimately, obscure the very dynamics of capitalist appropriation they aim to expose. Instead, what is most interesting in the process of data use by platforms is the hypertrophy of capitalism's unproductive spheres, such as distribution and sale, which occurs in platform capitalism and transforms social interactions outside the workplace into vehicles of value realization.

Moreover, users' digital activity – even when understood as creative output in the form of digital content – does not immediately constitute a commodity. They acquire the form of commodities only once transformed into data-information through a combination of human and non-human labor and then placed on the market. Furthermore, the main vehicle of commercialization of digital experience occurs through profiling – as in the case of user-generated content – rather than through direct sale. What advertisers purchase is not raw data, but advertising space and a matchmaking service with users: a peculiar service whose use-value lies precisely in facilitating the sale of commodities, and whose economic significance derives from this function. Undoubtedly, the value of data reflects an expression of labor, though not the unrecognized labor of users – just as, behind a weather forecast, there is no such thing as the 'unpaid labor' of clouds, whose movements generate weather data subsequently captured and commercialized.

To conclude, I argue that the unprecedented scale achieved by digital platforms and data collection in contemporary capitalism has functioned as a gravitational center for theories of social change within digital society. Scholarly focus on data collection was essential to investigate a novel phenomenon and has generated important insights into its phenomenology. Yet this gravitational pull has also operated like a black hole, absorbing explanatory frameworks to such an extent that little outside of it becomes visible. All explanations of contemporary social transformations risk being subsumed by its mass. To counter this data fetishism, it is necessary to broaden the scope of analysis once again, to acknowledge the importance of the data economy within the fundamental shifts of platform capitalism. Only in this way can we recognize that the platform ecosystem is located at a specific intersection of the globally created value chain; that the role of platforms in data management belongs primarily within the sphere of circulation and is closely linked to commodity logistics.

5. Demystify data fetishism

The authors discussed in the previous sections have made enormous contributions in highlighting the logics underlying data extraction – both in relation to the surveillance and instrumentarian powers it entails (Zuboff, 2019), and with regard to the ways in which digital platforms engage users by transforming their social and communicative activities into data (Fuchs, 2015). Nevertheless, as I have sought to demonstrate, these accounts still risk reproducing a form of data fetishism, situating the social, economic, and political dynamics of platform capitalism almost exclusively around data.

In what follows, I aim to outline a line of inquiry which, alongside the approaches considered thus far – and not in outright opposition to them – reintegrates data and digital platforms into a broader interpretation of capitalist development in recent decades, thereby granting data and platforms the status of fully social products. The purpose here is not to provide a definitive theoretical resolution but rather to suggest interpretive directions that may guide future research, while situating data and platforms within the wider framework of capitalist restructuring.

First, it is essential to underline the connection between the rise of digital platforms and the global reorganization of capital since the 1970s (Harvey, 1990). The profitability crisis in industrialized countries pushed capital, on the one hand, toward offshoring production and seeking new reservoirs of cheap labor, and on the other, toward a transition from rigid Fordist production models to more flexible global value chains, often organized through just-in-time logics. In parallel, the logistics revolution (Allen, 1997; Bonacich, Wilson 2008) reshaped commodity distribution, vastly expanding the possibilities for coordinating and integrating supply chains on a planetary scale.

More recently, the imperative to relaunch Western economies in the wake of the 2008 crisis further fueled the search for new markets and for more refined forms of targeted sales, as well as for novel avenues of valorization outside traditional industrial production spaces. This was because in those spaces profit margins had narrowed after decades of intensified labor exploitation and cost reductions, achieved through outsourcing and the incorporation of more precarious, vulnerable labor.

Digital platforms offered capital a privileged terrain for investment: a space capable of linking data collection and commodification

with the opening of new markets, the refinement of sales techniques (with targeted advertising and sales), and the optimization of global logistics. Within this context, data extraction does not appear as an isolated phenomenon but as an organic component of capitalism's global restructuring.

This argument is not intended to collapse into a mechanical or narrowly economistic reading – blind to geopolitical tensions, contingencies, entrepreneurial innovations, and other variables that shape the specific pathways of social development. Rather, I suggest that data and platforms can only be understood as social products when situated within this wider dynamic of capitalist upheaval and restructuring, of which platform capitalism represents a culmination.

Indeed, in the context of systemic productive transformation, the processing of information in the form of big data, together with the infrastructural apparatus – both material and immaterial – of digital platforms, emerges as the technology and organizational form that renders the entire economic architecture operational. Today's just-in-time systems, global value chains, the centrality of logistics, and the expansion of distributive domains are sustainable – both in their current configuration and in their likely future evolutions – only through a complex technological and infrastructural ensemble: from consumers making purchases on digital platforms to workers performing tasks through them; from real-time data analytics to continuous, interactive user profiling; from the coordination and visibility of each step in the supply chain to the telecommunications networks and data centers required for storage and processing. It is the interconnection of these elements, made possible by the peculiar configuration of the platform, that ensures the reproduction of platform capitalism. Digital platforms, indeed, instead of remaining confined to their original domains – whether social networks, marketplaces, or messaging apps – have evolved into vast ecosystems managed by single proprietary companies, which have progressively unified their systems and made possible a continuous transfer of information across their different components. This expansion has rapidly connected the different dimensions of the chain, transforming online social interactions into information that can be used in marketplaces, and converting proximity to the consumer, together with the predictive analysis of consumer behavior, into inputs for an increasingly refined logistics of consumption. This convergence becomes particularly visible in those platforms that have used their informational

infrastructure to develop in-house logistical extensions, such as Amazon, Alibaba, or Walmart.

The aim here is not to draw a strict causal chain that would risk inversion, as if digital platforms were what they are today simply because they could not have been otherwise given the needs of the system – a system that, without these very technologies, would not exist in the form we know today, nor could it have pursued those specific directions. Rather, the point is to emphasize the reciprocal conditioning between platforms and a transforming socio-economic system. On one side, the restructuring needs of capital stimulated the emergence and growth of platforms; on the other, the platform ecosystem enabled and consolidated that new economic arrangement. In this perspective, platforms function as the ‘intelligence of capital’, the nerve center through which restructured capitalism organizes, coordinates, and renders its processes intelligible to itself. The platform functions as an informational infrastructure that connects the end user to the productive and distributive layers of the process, extending to them the same logic of visibility, traceability, and coordination.

It is precisely this nexus – the relation between platforms and capitalist reorganization – that risks being sidelined by readings that reduce the issue to the autonomous use of data, the exploitation of unpaid user labor, or the dimension of control and surveillance alone.

From this reflection, one can see that the transformation of information into data, and subsequently into big data, is far from being a discovery or invention. It is, rather, a fully-fledged social product, the inevitable outcome of a socio-economic system that expanded on a global scale and thereby required the translation of information into data, that is, the transformation of knowledge into a productive input. In this sense, datafication is neither an isolated event nor the result of entrepreneurial genius, but the structural outcome of a dynamic intertwining of global transformations, capitalist restructuring, and the redefinition of social processes as a whole.

The critical debate around datafication had already produced, through the notion of dataism, a critique of the tendency to exalt data and their centrality (Van Dijck, 2014; Santaella & Kaufman, 2021). However, this same critical orientation has often developed primarily as a critique of the conditions under which data are extracted, appropriated, and used in relation to users of digital platforms: in the form of colonial appropriation (Couldry & Mejias, 2019), alienation

(Bezerra, 2024), exploitation (Fuchs, 2014; 2015), or surveillance (Zuboff, 2019). Despite their relevance, these perspectives tend to remain anchored to an analytical dimension that, in interpreting the role of data, partly reinforces their isolation. This is not a limitation in itself, since scientific inquiry may legitimately choose to isolate its own field of observation. However, as often happens in the social sciences, interpretations centered on specific phenomena may produce broader categories for describing society, as occurred earlier with the notion of information society and, more recently, with expressions such as surveillance capitalism, data capitalism, or data colonialism. From this perspective, it becomes essential, at the epistemological level, to recalibrate the position that data occupies within contemporary society and to adopt a more systemic perspective. Such an approach makes it possible, for instance, to broaden the disciplinary scope of analysis by connecting the study of data to debates on globalization, logistics, and transformations of work. It also changes the interpretation of the role of digital platforms, opening new lines of inquiry into their relevance within society. In this way, the analysis can shift from a critique of the opaque practices of individual large platforms to a broader assessment of the infrastructural role they have assumed in the overall processes of social reproduction.

6. Conclusions

The argument developed in this article has sought to realign the debate on data and platforms with the transformations of contemporary capitalism; it has been guided by the aim of situating data and digital platforms within the relations of production and circulation. The category of ‘data fetishism’ has been proposed not to diminish the importance of information, but rather to rescue it both from naturalization (data as the ‘new oil’) and from the assumption that it alone is sufficient to explain the dynamics of digital capitalism. I have shown that big data are social products whose significance derives from their inscription within restructured relations of production and circulation on a global scale, and that they become relevant only insofar as they are embedded in the platform ecosystem that coordinates markets, logistics, and revenue models.

From this perspective, interpretations that privilege the centrality of the user-consumer or that extend the notion of labor without

limits end up obscuring more than they reveal. In the first case, the dystopia of surveillance flattens differences of class, race, and global positioning; in the second, it may be read as an attempt to identify new subjectivities in a West that seems to have lost the identity of its industrial working class. In both cases, the global role of digital platforms is diminished, as is their connection to the broader evolution of the capitalist system.

The proposal advanced here, by contrast, is to recover this connection – without losing the insights that previous authors have brought to light concerning the role of platforms. It is to restore data to their character as social products. Such a recomposition allows us to view platforms neither as an omnipotent Big Other nor merely as extractors of ‘unpaid labor’, but as the ‘intelligence of capital’. They are organizational and technical devices that render calculable and governable a capitalism restructured by the long cycle opened in the 1970s – offshoring, extension of global value chains, just-in-time production, digital marketing – and which in turn make that very configuration practicable.

The theoretical implications of such a redefinition are still far from fully explored, and this contribution therefore positions itself as an interpretive and epistemological orientation rather than as a definitive theoretical resolution. This opens the way for further empirical inquiry into what this process of defetishization enables us to understand about the relationship between platforms and the reorganization of the economic system. In this sense, cross-sectoral perspectives become crucial: those that connect platform studies with logistics studies, infrastructure studies with analyses of the reorganization of global value chains.

Methodologically, this requires developing tools of inquiry capable of tracing the circuits that link data, logistics, and commodities; capable of identifying the connections between digital platforms, marketplaces, data centers, and logistics warehouses. In this regard, the coordination of research expertise across disciplinary boundaries becomes not an optional enrichment, but a necessary condition for understanding.

Finally, such an approach compels us to reconsider what is meant by platform capitalism: not simply a profit model, but rather a stage in the development of capitalism itself.

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Understanding Adolescent Engagement in Theatre through Reflexive Thematic Analysis within a Participatory Research–Design–Evaluation Framework

1. Introduction

Theatre has been recognized as a space for collective meaning-making, creativity, and inter-generational dialogue. Participation in theatre has been associated with enhanced self-expression, social connectedness, and the development of cultural belonging among young people (Daykin et al., 2008; Ferrer-Fons et al., 2022). Participatory theatre practices, in particular, are frequently framed as empowering, offering adolescents opportunities to co-create, perform, and shape artistic narratives (Brown & Novak-Leonard, 2011). However, despite this normative focus on participation and empowerment, cultural participation remains socially differentiated and associated with socio-economic characteristics (Eurostat, 2026). Furthermore, critical scholarship has warned against conflating participation and empowerment. Research on cultural policy and participation studies has revealed that participation does not necessarily entail empowerment and that participatory approaches may be embedded in institutional settings that work to subtly reproduce hierarchies of expertise and authority (Joss, 2021; Jancovich, 2017; Cornwall, 2008).

These discourses indicate the need to shift the focus from understanding engagement as an outcome to thinking of empowerment as a process that is shaped by a variety of factors. Informed by this understanding, the current study seeks to answer two related research questions:

RQ1. How can adolescents and theatre stakeholders be empowered to work together to develop appealing theatre activities?

RQ2. How is this empowerment co-produced and negotiated within a multi-actor theatre ecosystem shaped by relational, structural, and symbolic conditions?

These questions place empowerment at the forefront as a dynamic process that is situated within a theatre ecosystem that includes

adolescents, artistic directors, educators, facilitators, researchers, and other stakeholders. In this research, empowerment is conceptualised as a process of developing across three interrelated planes:

- Relational conditions, which refer to the interpersonal and intergenerational processes of negotiating voice, trust, and influence;
- Structural conditions, which refer to the organisational arrangements, temporalities, and resource configurations that shape and limit participation;
- Symbolic conditions, which refer to language, cultural capital, recognition, and legitimacy allocated to different stakeholders within the theatre ecosystem.

To examine these planes, the research will examine the first cycle of implementation of the CCRED (Collaborative Change Research, Evaluation, and Design) approach (Busch et al., 2019) within the ForesTEEN project¹ funded by the European Commission in the Creative Europe programme (48 months, 2023-2027). ForesTEEN aims to stimulate the active engagement of adolescents in theatre activities through the creation of a community at national and European levels between live and digital experiences. The project is dedicated to adolescents aged 15 to 25 and their cultural ecosystem, which includes all individuals who interact with them for various reasons, including parents, educators, theatre professionals, and spectators. Although the ForesTEEN project foresees four full implementation cycles of CCRED over 48 months, this paper analytically focuses on the first complete cycle as an explanatory case. Subsequent cycles are referenced to illustrate the longitudinal and iterative logic of the methodology rather than to provide a detailed comparative analysis. Several activities for stimulating the engagement of adolescents have been organized during the first cycle within events hosted by the project partners, such as international theatre Festivals and Gatherings.

The CCRED approach combines participatory research (Vaughn & Jacquez, 2020), participatory design (Brown & Wyatt, 2015), and participatory evaluation (Archibald, 2024) into loops of reflection, co-creation, and organisational learning. Through reflexive thematic analysis (Braun & Clarke, 2021), the study examines

¹ <https://teentheatrework.eu/en/>

how empowerment is experienced, enabled, and constrained within a transnational theatre context.

The main contributions of this paper are threefold: (i) it codifies the approach of participatory research, evaluation, and design into an integrative methodological framework for cultural engagement; (ii) it validates the applicability of the CCRED framework through a large-scale transnational theater ecosystem; and (iii) it empirically analyses how relational practices, structural arrangements, and symbolic hierarchies shape adolescents' capacity to exercise agency.

The remainder of the article is organised as follows. Section 2 situates the work within the literature on participatory theatre and cultural governance. Section 3 describes the CCRED framework and empirical context. Section 4 presents the findings of the reflexive thematic analysis. Section 5 discusses their implications for cultural policy, participatory practice, and youth engagement. Finally, Section 6 concludes the paper.

2. Related work

Participatory methods have been used for years to promote youth participation in arts, but their use in theatre systems is a complex issue. The literature on the subject has pointed out the ability of participatory methods to promote creativity, ownership, and sociality among young people (Ferri et al., 2020; D'Andrea & D'Ulizia, 2024; D'Ulizia et al., 2025). Co-creation methods have been proven to increase the participants' sense of agency and cultural belonging (Brown & Novak-Leonard, 2011; Rivas Pagador et al., 2021; D'Andrea & D'Ulizia, 2025). Devised theatre, improvisation, and collaborative scriptwriting are frequently cited as methods that enable young people to explore identity, express emotions, and build collective narratives (Sawyer & Earle, 2019).

However, while these studies emphasize the transformative potential of participatory theatre, they often overlook the structural and institutional conditions that shape engagement. However, the focus of research is expected to be on the results of creative practices or audience development, rather than examining the relationship between participatory practices and governance structures, organizational hierarchies, and cultural policy frameworks. Consequently, the literature often celebrates participation while failing to examine the role of power in participatory contexts.

The notion that participation necessarily leads to the democratization of cultural production has been increasingly problematized in cultural policy research. Joss (2021) and Jancovich (2017) propose that participatory projects are situated within organizational logics that maintain existing power hierarchies of expertise, authority, and cultural capital. Participation, in this sense, can be seen as a governance approach that is consistent with managerial or neoliberal agendas, rather than a means of redistributing decision-making power.

This is especially pertinent in the context of theatre, where professional standards, artistic freedom, and organizational frameworks may serve to circumscribe the degree to which adolescents are able to contribute to programming or strategic decision-making. The distinction between invited participation and co-governance (Cornwall, 2008) is, therefore, highly pertinent, as it implies that while adolescents may be engaged in activities, they may not necessarily have the ability to shape organizational agendas.

Critical approaches to participation (Cooke & Kothari, 2001) highlight the ways in which the discourse of participation can serve to conceal underlying imbalances, creating tokenistic or symbolic forms of participation. These critical approaches highlight the need to consider not only the presence or absence of participation but also the manner in which participation is practiced, negotiated, and mediated by institutional actors. Within cultural contexts, participatory projects may actually serve to maintain rather than transform existing power relations if they do not address structural issues of inequality or symbolic relations of power.

Youth voice and agency studies (Lundy, 2007; Wong et al., 2010) emphasize that participation must be more than simply a matter of expression, that it must also entail the possibility of influence. Intergenerational relations are a key factor in shaping the experiences of adolescents within cultural institutions. Adults maintain a privileged position in decision-making structures, conceptualizing participation as a form of consultation rather than co-production. Such scholarship is critical for understanding the ways in which adolescents negotiate their position within theatre systems.

Although there is an increasing focus on participatory theatre, three gaps are apparent in the existing literature:

1. The absence of holistic methodological frameworks that incorporate participatory research, design, and evaluation in multi-site cultural settings;
2. The relative neglect of the governance aspects, such as the role of institutional frameworks in participation;
3. The need for more focus on intergenerational power relations and the distribution of cultural capital in transnational settings.

This research fills these gaps by proposing the CCRED framework that encompasses participatory research, evaluation, and design in a transnational theatre setting, while also focusing on the relational and structural aspects that influence adolescent participation.

3. Materials and methods

This research employs a qualitative, participatory, multi-site case study grounded in an interpretivist epistemology. We focus our analysis on the first implementation cycle (2023, 2024) of the CCRED (Collaborative Change Research, Evaluation and Design) methodology within the ForesTEEN project. People belonging to the ForesTEEN theatre ecosystem (i.e. adolescents aged 15 to 25, parents of adolescents, teachers of adolescents, theatre professionals (e.g., artistic directors, theatre trainers, educators, researchers, theatre directors, and actors), spectators of theatre events, and partners of the consortium of the ForesTEEN project) are involved in all the research activities. Participants were not recruited to ensure representativeness, but to reflect the heterogeneity of the theatre ecosystem involved in the project. Instead of aiming for statistical generalization, the study pursues analytical and methodological transferability by investigating how engagement is co-produced, negotiated, and structurally mediated within a transnational theatre ecosystem.

Our interpretivist position recognizes that knowledge is co-created through interactions between adolescents, adult stakeholders, and researchers. The research team was embedded in the project's organisational structures that influenced access, facilitation, and interpretation. Rather than treating this positionality as a bias to be eliminated, we approach it as an analytical resource while remaining attentive to the risks of methodological advocacy and institutional influence. Reflexive dialogues among researchers were

employed to challenge their own assumptions, to uncover power relations, and to enhance the interpretive depth.

3.1 The CCRED framework

The CCRED framework combines three methodological dimensions, participatory action research, participatory design, and participatory evaluation, into a single continuous triple-loop structure. Whereas traditional models may use these approaches one after the other or separately, CCRED represents them as an iterative, governance-oriented process. The overall structure of CCRED is illustrated in Figure 1.

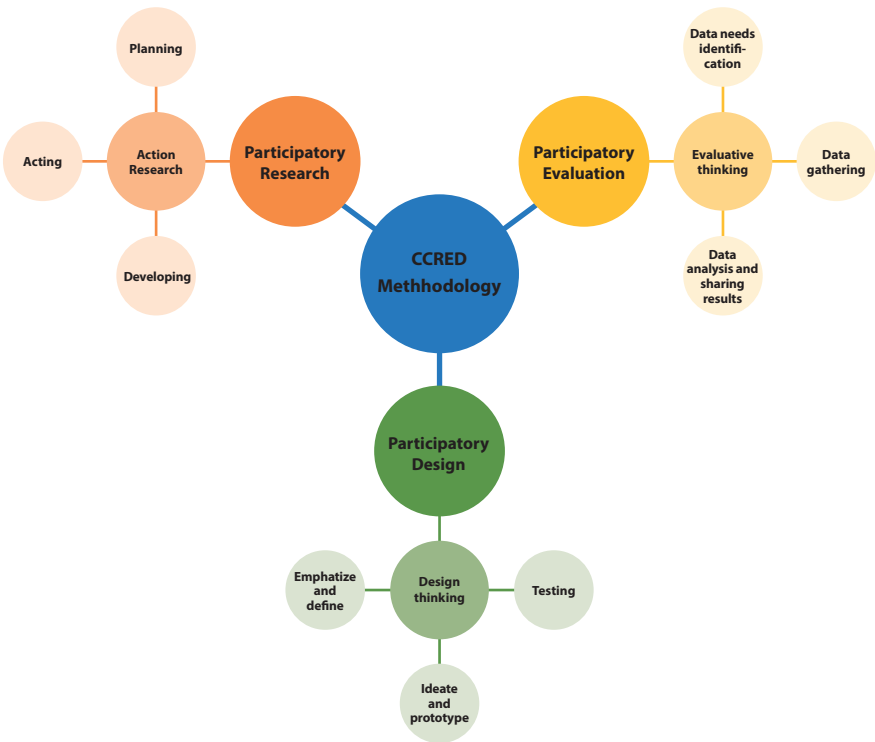


Figure 1. The defined CCRED framework

The framework leans on three principles:

- Co-agency and knowledge production that is distributed, positioning adolescents and adults as collaborators and not only as objects of study;
- Iterative reflexivity, allowing the phases of data gathering, analysis, and re-design to occur in recurring loops of mutual influence;
- Ecosystemic relationality, conceptualizing engagement as emerging from interactions among institutional, relational, symbolic, and structural conditions.

The aim of the participatory research approach (Vaughn & Jacquez, 2020) encompasses the definition and implementation of a research framework by engaging people who are the focus of the research. Specifically, the action research approach (Mertler, 2009) is applied to collecting the points of view of theatre ecosystem actors, developing a research action plan of the activities for improving the emerged critical points, as well as stimulating critical thinking on the implemented activities, as represented in the orange part of Figure 2. The events organized in each of the four main stages of the action research approach (i.e., planning, acting, developing, and reflecting) within the ForesTEEN project are shown in Supplementary material S1.

The participatory design approach aims to engage the actors of the theatre ecosystem in active, influential roles, including as decision-makers. The design thinking approach (Plattner, 2013) is used to shape and co-define further pathways (i.e., a series of activities and solutions) to be included in the research action plan for stimulating and improving the engagement and empowerment of adolescents, as represented in the green part of Figure 2. The events organized in each of the three stages of the design thinking approach (i.e., empathize and define, ideate and prototype, and test) within the ForesTEEN project are shown in Supplementary material S2.

Finally, the participatory evaluation approach aims to evaluate the experience lived by the actors of the theatre ecosystem within the events organized by the project (TAG (theatre action group) activities, visiting festivals, online TAG activities, TREE line week adventures (i.e., outside informal meetings organized in the Giglio Island), and co-curational activities). Specifically, evaluative

thinking (Archibald, 2024) is used to assess if the activities implemented within the project for improving the engagement of adolescents in theatre activities satisfied the expectations of the actors of the theatre ecosystem, as represented in the yellow part of Figure 2. The events organized in each of the four phases of the evaluative thinking approach (i.e., data needs identification, data gathering and data analysis, sharing of results, and implementing actions) within the ForesTEEN project are shown in Supplementary material S3.

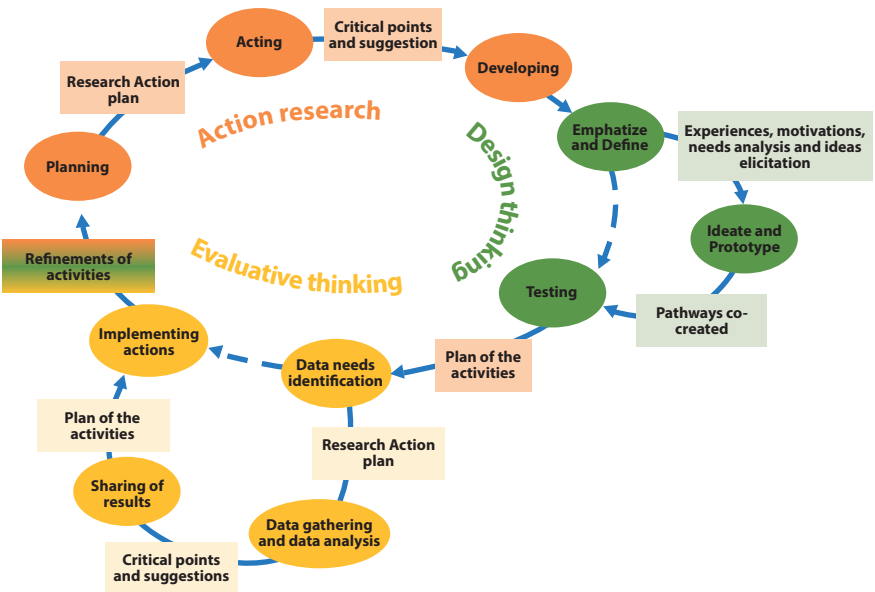


Figure 2. The defined CCRED framework applied to the ForesTEEN project.

3.2 Reflexive thematic analysis

The work utilizes a contextualist, reflexive thematic analysis approach (Braun & Clarke, 2021) that recognizes that themes are a result of researchers' interpretive interaction with the data and not objective entities that have been uncovered. This approach has been chosen due to its flexibility and suitability for the analysis of qualitative data obtained from participatory processes involving diverse stakeholder groups. Differences in coding were treated not as discrepancies to be resolved through reliability procedures, but as opportunities for reflexive dialogue aimed at enhancing interpretive richness.

The qualitative analysis referred to the following types of data collected during events/activities summarized in Appendix A:

open-ended questions from the initial assessment and monitoring questionnaires during festivals, transcriptions of group discussions, and written documents collected during participatory workshops. All qualitative materials were considered part of a single corpus of analysis, regardless of the specific data collection tool or event.

The qualitative content analysis method was carried out according to the six-phase approach of Braun and Clarke (2021):

- Familiarization with the data: Qualitative content analysis researchers have thoroughly read the corpus for analysis several times to acquire a deep understanding of the content;
- Generation of initial codes: Codes were generated using an inductive approach. The first semantic codes were created throughout the entire dataset and no existing theoretical framework was consulted for the coding of the material;
- Searching for themes: The codes were organized into themes based on the notion of the conceptual similarity;
- Reviewing themes: Subsequently, themes were examined with the dataset in mind, checking the themes' internal consistency and the external clarity;
- Defining and naming themes: The themes were analytically developed and defined, and five main dimensions were visually identified, i.e., ownership, accessibility and structural barriers, informality versus institutional structure, intergenerational mediation, and language and cultural capital;
- Producing the analytical narrative: The themes were explained with reference to the CCRED model and the literature on participatory governance and cultural participation.

In line with reflexive thematic analysis, we acknowledge that the researchers' involvement in the CCRED implementation shaped both data generation and interpretation. Rather than seeking coding consensus as a marker of reliability, discussions between researchers functioned as reflexive dialogue to deepen interpretive complexity. The initial codes were then compared, and any variations were discussed between the two researchers. Coding was undertaken independently and subsequently discussed as a form of reflexive dialogue. Differences were not resolved through consensus

as a reliability procedure but explored to expand interpretive depth and theoretical sensitivity. In reflexive thematic analysis, researchers do not consider saturation as a measure of completeness but rather as a practical decision about the depth of analysis (Braun & Clarke, 2021). Saturation was evaluated at the last stage of the review where the new data only supported existing themes without revealing any new insights. Our proximity to the field was not treated as a source of bias to be eliminated, but as an interpretive resource, consistent with reflexive thematic analysis.

In compliance with GDPR privacy regulations, all participants involved in this participatory research were asked to approve the informed consent form that covers participation and data use for research purpose. All participants were informed that the data collected was anonymous and used only for research and evaluated anonymously. Written consent was obtained electronically through a digital form that participants confirmed via a checkbox before the starting of each event and activity. For minors, the informed consent was obtained from their legal guardians. By providing this consent, participants agreed to take part in the participatory research.

4. Results

The results are derived from qualitative data collected through participatory research, design, and evaluation practices using questionnaires, reports of workshops, and transcripts of group discussions, as illustrated in Appendix A. In keeping with the reflexive thematic analysis approach, themes were developed through an iterative process of engagement with the data and interpreted in the context of the structural, relational, and symbolic conditions that frame adolescent participation in a transnational theatre environment.

The themes that emerged from the data set include adolescents' and adult stakeholders' reasons for engagement of youth in theatre, which were centred on creativity, self-expression, social bonding, and intercultural exchange. However, their experiences also highlighted the ways in which the engagement is mediated and negotiated in institutional settings characterized by professional hierarchies, inequities of resources, and intergenerational dynamics of power. Five themes emerged from the analysis: ownership, accessibility and structural barriers, informality vs. institutional structure, intergenerational mediation, and language and cultural capital.

To enhance transparency regarding how the five themes were constructed, Table 1 maps each theme to the specific events and activities from which the qualitative insights were derived. (Table 1).

Table 1. Mapping of themes to data sources across CCRED events

Theme	Primary Events Contributing Data	Types of Data Extracted
Ownership	Transgenerational Workshops (KLAP, Krakeling, Segni); Initial Assessment Questionnaire	Workshop notes; group discussions; adolescent proposals; facilitator reflections
Accessibility & Structural Barriers	Initial Assessment Questionnaire; Monitoring Questionnaires (KLAP, Krakeling)	Open-ended survey responses; logistical feedback; parental and educator comments
Informality vs Institutional Structure	TREE Line Week (Giglio Island)	Field notes; informal conversation transcripts; reflective diaries
Intergenerational Mediation	Group discussion (ASSITEJ Artistic Gathering); Transgenerational Workshops (KLAP, Krakeling)	Group discussion transcripts; facilitator notes; intergenerational dialogue recordings
Language & Cultural Capital	Transgenerational Workshops (KLAP, Krakeling); Discussion group sessions (ASSITEJ Artistic Gathering, KLAP, Krakeling, TREE Line Week)	Transcripts; written workshop outputs; observations on linguistic dynamics

In keeping with the reflexive thematic analysis approach, the themes outlined above were not identified in a mechanical way from discrete events, but rather through an interpretive process whereby the research team engaged iteratively with the entire data set.

The discrete events outlined in Appendix A provided a heterogeneous backdrop, ranging from highly structured festival workshops to more casual outdoor activities, which enabled the research team to examine how relational, structural, and symbolic conditions varied across these different contexts. This cross-event reflexive engagement enabled the identification of patterns that were not tied to a single activity but emerged through the researchers' ongoing interpretive dialogue with the data. The table above therefore illustrates not only the distribution of data sources but also the multi-sited, iterative, and interpretive nature of theme development within the CCRED framework.

4.1 Ownership

Ownership emerged mainly in transgenerational workshops, where adolescents articulated their claim to activity design. During the Klap Festival, adolescents explicitly expressed the desire to shape activities, with one adolescent stating: *"I expect to learn different ways of expressing feelings on stage"*. Similarly, at the Segni Festival, an adolescent emphasised the sense of protagonism by saying: *"I'm satisfied because everything worked out perfectly and I'm really proud of how the project turned out and how much participation there was"*. These statements illustrate how ownership is tied to emotional investment and the perception of being taken seriously within the theatre ecosystem.

However, the adolescents recognized that ownership was not always allocated in the same way. In some festivals, they were encouraged to develop content or run activities; in others, they were still consulted but did not have an equal say. Theatre professionals recognized the importance of youth ownership but also the institutional limitations of time, budget, or artistic consistency that influenced the level of adolescent input. In fact, although theatre professionals consistently acknowledged the value of giving adolescents a meaningful role in shaping activities, they also highlighted the institutional constraints that limit how far this ownership can extend in practice. As one consortium partner observed in the initial assessment questionnaire, *"theatre for young audiences is mostly done and organised by adults... young people don't have a voice everywhere. There is hierarchy in theatre and pressure to produce"*. This tension emerged across several events: professionals expressed

genuine interest in co-creation, yet their contributions revealed the weight of organisational demands, artistic standards, and time pressures. During the Segni Festival, for example, a partner noted that involving adolescents requires structured processes and dedicated resources, stating that *“if cultural venues set up processes to involve young people, then things will change (it’s just a question of what and how)”*. Even practitioners who were enthusiastic about collaboration recognised the limits imposed by existing workflows, with one theatre professional explaining that she hoped *“to get to know new professionals and theatre/performance dynamics and learn new things”*, implicitly signalling that youth participation must coexist with professional development goals and artistic coherence. These reflections illustrate how ownership is not only a relational aspiration but also a governance challenge shaped by institutional realities. This issue is part of the broader discourse on cultural democracy and symbolic power redistribution. Ownership is identified not only as a motivator but also as a governance concern: the ability of adolescents to make decisions is conditional on the institutional desire to share power and transform existing power structures.

4.2 Accessibility and Structural Barriers

Accessibility and structural barriers were visible in initial monitoring questionnaire, where adolescents and youth were open about the logistical, economic, and informational issues they encountered. Adolescents described concrete obstacles, such as *“Sometimes we live far from a cinema or from a place that hosts theatre”*. Others highlighted economic constraints, noting that *“many people don’t have the money to attend events”*. One adolescents also noted during the Klap Festival that *“the play was interesting, however being exclusively in Danish it presented quite a few language barriers”*, highlighting how linguistic accessibility directly shapes adolescents’ ability to engage with artistic content. These testimonies show how logistical, economic, and linguistic factors intersect to shape participation.

Accessibility was affected by the institutional setting. While some festivals were free and flexible in nature, others were based on traditional models that inadvertently excluded some groups of people. The need for better communication, inclusive outreach programs, and accommodating activities was highlighted by educators and parents. As noted in the Initial Monitoring report, several adults

pointed out *“insufficient information/promotion of the event”*, while others stressed that *“maybe the parents are not familiar with this kind of stuff so their kids don't have the chance to experiment with theatre”*.

Structural barriers that were identified by the participants as influencing adolescent participation include economic limitations, distance, scheduling conflicts, and a lack of awareness of the opportunities available. These factors were especially important for adolescents who belonged to lower socio-economic groups or those who lived in rural areas. The findings of this study confirm the cultural capital theory, which points to the significance of socio-economic inequalities in structuring adolescents' ability to participate in cultural activities.

4.3 Informality versus Institutional Structure

Informality vs. institutional structure was visible in TREE Line Week, where the absence of institutional structure allowed adolescents to articulate their views on how informal settings facilitated trust and creativity. During the TREE Line Week, adolescents repeatedly described informal settings as enabling deeper connection and creativity. One participant reflected on the experience by saying that informal exchanges created *“a sense of connection and togetherness with the whole group”*. Similarly, at the Krakeling Festival, an adolescent described the emotional impact of an immersive informal moment: *“I was literally inside a painting and it made me so emotional... I cried”*. These examples show how informality fosters openness and emotional engagement in ways that structured festival formats sometimes inhibit.

Therefore, the participants were consistent in emphasizing the significance of informal relational spaces, such as backstage interactions, informal conversations, or meals, in building trust, creativity, and engagement. The adolescents believed that these environments were more welcoming and less intimidating than those of formal institutions.

However, institutional structures, such as festival programs, professional standards, and organizational charts, also shaped the pace and boundaries of participation. While necessary for coordination, these structures sometimes hindered spontaneity or the adolescents' influence on decision-making.

4.4 Inter-generational Mediation

Intergenerational mediation was visible in group discussions and transgenerational workshops, where adults and youth mediated their power, authority, and voice. At the Segni Festival, adolescents explicitly recognised adults' willingness to listen, with one adolescent noting that the experience worked because "*adults were good listeners... relations were horizontal*".

Conversely, at the Krakeling Festival, a teenager pointed out the limits of intergenerational dialogue, stating: "*There weren't many interactions*" and that adults were "*not so eager to share thoughts, experiences and opinions with adolescents*". These contrasting experiences highlight how intergenerational mediation depends heavily on facilitation practices and the institutional context.

Intergenerational relations were found to be a prominent theme in all the sites. Adolescents appreciated the chance to work together with professional adults but also experienced instances where their ideas were discredited, eclipsed, or reinterpreted through adult lenses. Theatre professionals themselves acknowledged the complexity of integrating adolescent voices within established artistic and organisational frameworks. As one professional explained, she hoped "*to get to know new professionals and theatre/performance dynamics and learn new things*", implicitly signalling that youth participation must coexist with professional expectations, artistic standards, and production constraints. This tension was also recognised by a consortium partner who observed that "*young people don't have a voice everywhere... there is hierarchy in theatre and pressure to produce*". Together, these reflections illustrate how intergenerational mediation is shaped by both relational intentions and structural realities, influencing the extent to which adolescents can exercise agency within collaborative artistic processes.

In some of the workshops, the role of the facilitators was a key mediating factor, facilitating the redistribution of speaking turns, recognizing the adolescents' input, and encouraging the adults to use more dialogical approaches. These instances of mediation highlighted the dynamics of co-producing engagement rather than merely being included. Intergenerational mediation is a critical component of co-governance as a transformation of participation. Without attention to power dynamics, participation may lead to the reinforcement of adult-dominated norms and the marginalization of adolescents' participation.

4.5 Language and Cultural Capital

Language and cultural capital were visible in transgenerational workshops and discussion groups, where symbolic structures were more visible. Language was identified as both a practical and symbolic barrier in the transnational environment. Language barriers were particularly evident in the Klap Festival, where several performances were entirely in Danish. Adolescents who had limited English language proficiency reported difficulty in participating in conversations, understanding instructions, or expressing complex ideas. One adolescent reported: *“The play was interesting, however being exclusively in Danish it presented quite a few language barriers”*. At the Krakeling Festival, another participant described the emotional discomfort linked to linguistic insecurity: *“I had bad feelings regarding the language”*. These testimonies show how linguistic capital shapes not only comprehension but also confidence, participation, and perceived legitimacy within transnational cultural spaces.

In addition to language, the group identified differences in cultural capital related to knowledge of theatre terminology, artistic conventions, or institutional knowledge that impacted who felt entitled to speak or contribute. These factors were especially visible in international workshops, where symbolic power was more overt. During the Klap Festival, for example, an adolescent noted the difficulty of understanding performances rooted in local artistic codes, stating that *“the play was interesting, however being exclusively in Danish it presented quite a few language barriers”*. Yet the challenge extended beyond language itself: several adolescents reported struggling to follow discussions that relied on professional vocabulary or assumed prior knowledge of theatre-making processes. These dynamics were also visible among adults. A consortium partner at the Segni Festival admitted difficulty in following exchanges due to the specialised language used, remarking that *“in some moments I could not follow conversations... I would have wished for visual aids to help me understand”*. Such reflections reveal how symbolic hierarchies, rooted in expertise, institutional experience, and familiarity with artistic discourse, can inadvertently reproduce power imbalances, influencing whose voice is heard, whose contributions are validated, and who feels authorised to participate in decision-making processes.

Language and cultural capital are symbolic forms of power that impact and influence participation. To address these disparities, it is necessary to move beyond translation or facilitation and implement structural solutions to democratize knowledge and redistribute symbolic power.

5. Discussion

The results of the first cycle of the CCRED framework shed light on the ways in which a complex interplay of relational, structural, and symbolic factors mediates adolescents' engagement with theatre. While participation is commonly conceptualized as a self-evidently empowering practice, this research shows how engagement is mediated in institutional settings characterized by professional hierarchies, resource inequities, and intergenerational relations of power.

The findings confirm recent research in cultural policy studies that participation is better understood as a form of governance than as an artistic or educational practice. Adolescents' experiences of ownership, accessibility, and influence were directly linked to institutional design and decision-making structures. Engagement emerged not as an individual behaviour but as a relational process shaped by organisational routines, funding regimes, and symbolic hierarchies.

The findings are consistent with critiques of participatory rhetoric (Cooke & Kothari, 2001; Cornwall, 2008), which suggest that inclusion is not necessarily equivalent to influence. In some instances, adolescents were included in participation but had little opportunity to exercise influence. While the CCRED approach partially addresses this issue by incorporating evaluation and design into cycles of engagement, the structural conditions of time, institutional resistance, and professional culture continue to shape the degree to which participation is transformative rather than consultative.

Moreover, the theme of intergenerational mediation in the study emphasizes the significance of relational practices in supporting youth agency. Although adolescents appreciated collaboration with adults, their agency was contingent on facilitation practices that used strategies of speaking time redistribution, validation, and disruption of adult dominance. These results are consistent with the literature on youth agency, which asserts that effective participation must involve both expression and influence (Lundy, 2007).

Accessibility, language, and cultural capital are recognized as significant structural and symbolic factors that shape engagement. These results support the need to move attention away from behavioral or motivational explanations and towards the socio-economic and cultural conditions that mediate participation. In the transnational context, language inequities and symbolic hierarchies are further exacerbated, requiring a deliberate attempt to democratize knowledge and redistribute symbolic power.

The CCRED framework provides a useful model for connecting participatory research, design, and evaluation in cultural ecosystems. The triple-loop framework of CCRED enables constant adjustment and promotes co-agency between adolescents and adult stakeholders. Nevertheless, its effectiveness requires institutional commitment to share decision-making power and to integrate participatory approaches into organizational governance. The results of the first cycle of CCRED illustrate the potential of the framework but also point to the importance of sustained commitment to structural transformation.

6. Conclusion

This study examined the first implementation cycle of the CCRED framework within the ForesTEEN project, to understand how adolescents and theatre stakeholders can be empowered to collaboratively create inclusive and appealing theatre activities. The findings clearly indicate that such empowerment does not arise from a single intervention but emerges from a constellation of relational, structural, and symbolic conditions that shape the ways adolescents and adults share agency, influence decisions, and co-create artistic experiences.

The results directly address the research questions defined in the Introduction. Concerning RQ1, the results show that empowerment is possible when adolescents and adults work together in designed participatory infrastructure. Three processes seem to play a crucial role:

- Opportunities for ownership. In the KLAP, Krakeling, and Segni workshops, the adolescents wanted to influence activities and saw their ideas reflected in the programming. When the adolescents felt that their input counted, they reported higher levels of motivation, pride, and creative investment;

- Relational contexts that build trust and expression. Informal contexts, such as TREE Line Week, allowed adolescents to articulate their feelings, negotiate their ideas, and develop confidence. These relational contexts were critical to help adolescents feel entitled to make a contribution and take creative risks;
- Cycles of design and evaluation. The CCRED triple-loop model enabled the adolescents to witness the impact of their feedback on decisions. This impact of their contributions converted participation from a consultative process to a co-creative process, which reinforced their sense of empowerment.

Addressing RQ2, the results show that empowerment is not uniformly distributed, but co-produced and negotiated across three interdependent planes:

- Relational conditions. The role of intergenerational mediation emerged as a key empowerment factor. Empowerment is most evident in the events where adults mediated the conversation space.
- Structural conditions. Institutional routines, time constraints, and resource availability were the structural conditions that influenced the level of youth empowerment.
- Symbolic conditions. The symbolic conditions were revealed as key empowerment factors. For example, the level of adolescents' linguistic competence influenced the level of empowerment. Theatre terminology also influenced the empowerment process.

The research has major implications for cultural policy debates, as it reveals the importance of young people's participation in cultural organizations as a feature of relational governance, informed by institutional architectures and symbolic hierarchies. The CCRED framework provides a methodological route for operationalizing participatory governance in cultural institutions, but its success relies upon organizational commitment over time and a willingness to decentralize power.

For cultural policy, this study suggests the need to: (i) support infrastructures for sustained co-agency between young people,

rather than episodic participation; (ii) address structural issues of inequality in access and influence; (iii) acknowledge the impact of symbolic hierarchies upon perceptions of entitlement to participate; (iv) develop facilitation skills to support intergenerational dialogue.

Future studies will explore the impact of multiple CCRED cycles upon institutional cultures as the ForesTEEN project continues to evolve. This will reveal whether the conditions for empowerment, which were evident in this first CCRED cycle, can be sustained, transformed, or replicated in other cultural contexts.

Ethical Approval

This study was conducted in accordance with the guidelines of the Declaration of Helsinki and involved human participants solely for the purpose of evaluating the effectiveness of the proposed methodology and was conducted within the framework of the European Project ForesTEEN (Grant Agreement No 101131667). The ethical aspects of the project were assessed and approved by the European Commission at each formal stage of its lifecycle, including the initial application and the mid-term reviews.

Participation to the study was entirely voluntary, with participants informed of their right to withdraw from the sessions at any time without penalty. No sensitive personal data, as defined under Regulation (EU) 2016/679 (General Data Protection Regulation – GDPR), was collected, processed, or stored. The activities fell outside the categories requiring formal ethics committee approval under the local regulations of all the involved countries, including the Italian Legislative Decree 101/2018², the Serbian Personal Data Protection Act³, the French Data Protection Act 2018-493⁴, the Dutch General Data Protection Regulation Implementation Act (UAVG)⁵, the Spanish Organic Law 3/2018⁶ on the Protection of Personal Data and Guarantee of Digital Rights (LOPDGDD), the Danish Data

2 <https://www.gazzettaufficiale.it/eli/id/2018/09/04/18G00129/sg>

3 <https://www.poverenik.rs/images/stories/dokumentacija-nova/zakoni/ZZPLnovembar2018/ZZPLnovembar2018.doc>

4 <https://www.legifrance.gouv.fr/dossierlegislatif/JORFDOLE000036195293/>

5 <https://wetten.overheid.nl/BWBR0040940/2021-07-01>

6 <https://boe.es/boe/dias/2018/12/06/pdfs/BOE-A-2018-16673.pdf>

Protection Act 502/2018⁷, the German Federal Data Protection Act (BDSG)⁸, and the Lithuanian Law on Legal Protection of Personal Data I-1374⁹, since the research involved only voluntary participation in questionnaires and participatory workshops, without clinical procedures or the collection of sensitive and special-category data (GDPR, Art. 9).

Informed Consent

All participants were briefed about the study before the participatory workshops and questionnaire administration, and informed consent was granted by all subjects involved in the study and, for minors, by their legal guardians. They were also assured that no identifying details about them, especially their names, would appear on the manuscript. Written consent was obtained electronically through a digital form that participants confirmed via a checkbox. Data was processed exclusively in an anonymized form, in full compliance with GDPR.

Data Availability Statement

The data presented in this study are available upon request from the corresponding author. The data is not publicly available due to privacy restrictions, according to the informed consent signed by the participants.

Conflicts of Interest

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

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7 <https://www.retsinformation.dk/eli/lt/2018/502>

8 https://www.gesetze-im-internet.de/bdsg_2018/index.html

9 <https://e-seimas.lrs.lt/portal/legalAct/lt/TAD/TAIS.162442>

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Appendix A

Activity / Event	Period	Type of activity	Total participants / responses	Recruitment criteria	Minimum socio-demographic characteristics collected	Notes
Assitej Artistic Gathering	Nov 2023	Discussion group (hybrid)	22	Involvement in the ForesTEEN project or professional engagement in youth theatre activities; voluntary participation	Role in the theatre ecosystem; country of origin	Co-definition of the research plan
Initial questionnaire (baseline)	Nov 2023 – Feb 2024	Open-ended questionnaire	144 responses	Belonging to ForesTEEN theatre ecosystem; voluntary participation; informed consent	Age group; role in the theatre ecosystem; country of residence	Initial assessment
KLAP Festival	Apr 2024	Discussion group (hybrid)	12	Participation in festival activities; involvement in youth theatre initiatives; voluntary participation	Role in the theatre ecosystem; country of origin	Discussion on adolescent engagement
Monitoring questionnaire – KLAP	Apr 2024	Ex-ante / in-itinere / ex-post questionnaire	15 qualitative sections	Participation in KLAP Festival activities; voluntary participation; informed consent	Age group; role in the theatre ecosystem; country of origin	Event monitoring
TREE Line Week	Apr 2024	Discussion groups and outdoor activities	19	Participation in TREE Line Week activities; voluntary participation; informed consent	Role in the theatre ecosystem; country of origin	Workshops and collective reflection
Monitoring questionnaire – TREE Line Week	Apr 2024	Ex-ante / in-itinere / ex-post questionnaire	19 responses	Participation in TREE Line Week activities; voluntary participation; informed consent	Age group; role in the theatre ecosystem; country of origin	Immersive experience
Krakeling Festival	Oct 2024	Discussion group (in person)	29	Participation in festival activities; inclusion of adolescents, adults, and caregivers; voluntary participation	Role in the theatre ecosystem; country of origin	Inclusion of parents and teachers
Monitoring questionnaire – Krakeling	Oct 2024	Ex-ante / in-itinere / ex-post questionnaire	15 responses	Participation in Krakeling Festival activities; voluntary participation; informed consent	Age group; role in the theatre ecosystem; country of origin	Final event evaluation

Activity / Event	Period	Type of activity	Total participants / responses	Recruitment criteria	Minimum socio-demographic characteristics collected	Notes
KLAP – Participatory Workshop (DT)	Apr 2024	Design Thinking workshop	13	Participation in participatory workshop; representation of different stakeholder groups; voluntary participation	Role in the theatre ecosystem; country of origin	Empathize & Define phase
Krakeling – Participatory Workshop (DT)	Oct 2024	Design Thinking workshop	29	Participation in participatory workshop; heterogeneous stakeholder composition; voluntary participation	Role in the theatre ecosystem; country of origin	Empathize & Define phase
Segni Festival – Participatory Workshop (DT)	Nov 2024	Design Thinking workshop	37	Participation in participatory workshop; involvement in ForesTEEN activities; voluntary participation	Role in the theatre ecosystem; country of origin	Ideate & Prototype phase

Lifelong Learning as a Structural Condition and Geopolitical Resource in the AI Era

1. Introduction

For over three decades, the labour market has been undergoing a profound transformation. First came the processes of flexibilisation accompanying globalisation (Beck, 1999); subsequently, the advent of new digital technologies (Hirsch-Kreinsen et al., 2018; Pfeiffer, Suphan, 2015) and the rise of the platform economy (Poutanen et al., 2019); and, more recently, the increasingly widespread use of AI. Schwab (2016) reads this as a break with the past: never before have transformations of this kind spread so fast or reshaped work and society so deeply.

Technological innovation has historically reshaped the production of goods and production processes. Until now, however, this disruption — what Schumpeter (1942) called ‘creative destruction’ — had largely concerned manufacturing. Today, AI extends to intellectual work, broadening its scope. And given the rapid pace of innovation, workers find themselves continuously updating their skills rather than acquiring them once (OECD, 2021), adopting criteria and methods that were once essentially confined to the field of research.

These transformations intersect with two structural trends. On the one hand, the progressive ageing of Western societies, a phenomenon that is reducing the available workforce; on the other, the ongoing redefinition of the global balance of power. In both these circumstances, lifelong learning proves strategic. Based on this assumption, the analysis proposed here considers the close functional link between a highly skilled workforce, capable of mastering new technologies such as artificial intelligence (Ahrens, Spöttl, 2015; OECD, 2023a), if not even designing and producing them, and the geopolitical power of a state.

Lifelong learning (hereinafter LLL) is among the most appropriate responses to this combination of rapid technical innovation and socio-demographic pressure. In this scenario, upskilling policies take on a strategic role that goes beyond merely boosting labour

productivity (Angrist et al., 2021; Gomes, 2025): vocational training and professional development can in fact be regarded as ‘inclusive institutions’ (Acemoglu & Robinson, 2012) insofar as they are potential tools for ensuring greater scientific and productive success for countries and, consequently, geopolitical hegemony (Wasi et al., 2025; Hamadeh & Amin, 2025).

This work links development theory to the geopolitics of knowledge in the age of AI — a connection not yet drawn systematically. Its premise is simple: the decisive strategic resource is no longer oil or raw materials, but cognitive human capital, the capacity to generate and apply knowledge. Societies that mobilise a skilled, continuously updated workforce move faster technologically, and that speed translates into international advantage. Knowledge, in short, has become a form of geopolitical power.

The article is structured as follows. Section 2 presents the methodological framework, including the research questions, data sources and inferential strategy adopted. Section 3 examines the theoretical framework, from endogenous growth theory to the geopolitics of knowledge. Section 4 analyses the mechanisms through which knowledge becomes geopolitically relevant. Section 5 presents the main empirical findings on global competition for cognitive supremacy. Section 6 analyses the strategic role of older workers as primary beneficiaries of LLL provision. Finally, Section 7 discusses the findings and outlines directions for future research.

2. Methodological note

The paper addresses three main research questions in light of the complex reality we live in, characterised by the convergence of technological innovation, demographic ageing and geopolitical restructuring. The first question examines the extent to which LLL currently constitutes the structural condition for economic development and a geopolitical resource in the AI era. The second question examines the work skills most in demand by companies for the period 2025–2030. The third addresses the issue of how older workers can be adequately supported in their career reskilling pathways so as to ensure their continued presence in the labour market in response to the disruptive impact of new digital technologies on traditional business and market models.

The methodology adopted in this paper is based on a critical analysis of institutional reports (World Economic Forum, OECD, Stanford HAI). This is accompanied by an analysis of the sociological literature on economic development and the geopolitics of knowledge.

The analysis focuses on the main players in the AI race: the US and China, with India and the EU as further reference points. Within this group, the European countries serve as the comparative baseline — they let us gauge how wide the lifelong-learning gap is and what policies could close it.

Whilst adhering here to the theoretical level and not testing causal hypotheses in a statistical sense, the aim is to outline arguments that may in future guide research at the empirical level as well, in the belief that this topic will grow in relevance over time.

A methodological clarification is essential. The WEF reports are based on corporate surveys that capture perceptions and projections; they are not verified results. Nevertheless, they constitute the most systematic source available globally regarding employment needs, which is why they are widely used in comparative literature.

As regards data on China's output of STEM graduates, these are based on ministerial sources whose reliability is debated in the literature (Zweig & Wang, 2013); even applying a 30–40% discount for quality, however, the structural gap with the United States remains in the order of 2 to 1. A fuller, multidisciplinary study would require longitudinal employment data (economics), analysis of educational outcomes (educational psychology), ethnographic study of organisational cultures (anthropology) and computational modelling of future scenarios. This paper sketches that programme without claiming to exhaust it.

The research design is a structured, focused comparison (George & Bennett, 2005) with a plausibility-probing logic. The US and China are treated as the crucial case, where the link between knowledge formation and geopolitical power is most visible and empirically traceable; the European economies serve as the comparative baseline for assessing the lifelong-learning gap. Where the argument turns to causal mechanisms — how a country's capacity to form its workforce translates into geopolitical outcomes — it uses process tracing, following the observable steps that connect the two. The paper does not test causal hypotheses statistically; its contribution is theoretical and interpretative, laying the groundwork for future empirical research.

3. Theoretical framework: from the knowledge society to the geopolitics of knowledge

Since the mid-1980s, there has been a growing recognition of the link between investment in education, technological progress and economic growth. Paul Romer (1986, 1990) mathematically formalised this link in his theory of endogenous growth, thereby demonstrating that development is determined not only by exogenous factors but also, to a large extent, by factors internal to the economic system. These internal factors are represented by cognitive human capital and the resulting ability to design and implement technological advances. In the model theorised by Romer, the long-run rate of productivity increases in proportion to the rate of technological progress and thus to the stock of human capital allocated to the research and development sector. Consequently, governments seeking to support technological progress have every interest in incentivising training and research as factors conducive to development (Romer 1990, p. S97). At the same time, Robert Lucas (1988) and Robert Barro (1991) have documented how the divergence in economic performance between different countries around the world can be explained precisely by differences in the accumulation of human capital¹. It follows that the productivity and competitiveness of contemporary economies depend to a large extent on the ability to generate, process and effectively apply the knowledge developed (Castells 2010).

These theories have found further support in the concept of the ‘knowledge society’, which has gained prominence since the 1990s. According to this concept, knowledge enables the development of new discoveries and solutions, accelerates the interpretation of existing knowledge, and fosters connections that open up new fields of theoretical and applied knowledge (Nonaka & Takeuchi, 1995).

1 The concept of human capital has a precise theoretical genealogy. Schultz (1961) introduced it at the macroeconomic level, arguing that investment in education generates aggregate returns comparable to physical capital. Becker (1964) formalised it at the microeconomic level, defining human capital as the stock of knowledge and competencies embodied in individuals that increase their productive capacity. Lucas (1988) incorporated it into endogenous growth theory as a source of spillovers sustaining long-run productivity growth. Castells (2010) subsequently extended the concept beyond its economic framing: in the network society, human capital takes the form of cognitive capital — the capacity to generate, process and apply knowledge — making its continuous renewal a structural feature of competitive economies.

In this way, the human and social dimensions of the production, dissemination and utilisation of knowledge are fully recognised and valued (UNESCO 2005).

Knowledge, then, is a resource unlike any other. It obeys no law of scarcity: using it does not deplete it, and sharing it makes it grow.

The production of knowledge requires investment in human capital, research and training (Drucker 1993; Powell & Snellman, 2004). This approach has important implications for education and training systems: their quality is indeed crucial since, in addition to ensuring social equity, it guarantees a skilled workforce. As early as the 1960s, modernisation theory emphasised the importance of the interdependence between educational institutions and the economic-productive sphere (Harbison and Myers, 1964; Parsons, 1970; Treiman, 1970; Bell, 1973). Today, a country's systemic competitiveness is added to the aspect of economic and productive efficiency (Hanushek & Woessmann, 2008).

However, the transition to the knowledge society does not take place uniformly or automatically in an inclusive manner. For this reason, learning can no longer be conceived as a process limited to a specific stage of life but must necessarily be extended to be lifelong and lifewide (European Commission, 2000; OECD, 1996; Harteis, Billett, 2023).

A highly relevant aspect of education today concerns digital literacy (Gilster, 1997; Rivoltella, 2008). Addressing persistent inequalities, particularly in this area, requires policies that go beyond merely ensuring technological infrastructure and access to it, and instead involve investment in skills training (Warschauer, 2003). This is why the concept of the digital divide, initially referring to disparities in access to digital technologies, has evolved to also encompass inequalities in digital skills and the ability to use technology effectively for educational, professional and social purposes (van Dijk, 2020)².

It is clear from the above that having a suitably trained workforce today, capable of contributing to technological leadership, gives each country a consequent advantage in the global knowledge markets. For this reason, education and lifelong learning take on the character of a strategic resource, even from a geopolitical perspective.

2 A distinction is made between a first-level divide relating to physical access to devices; a second-level divide concerning digital skills; and a third-level divide relating to the tangible outcomes achieved through the use of technology, particularly in relation to educational opportunities and work performance (Wei et al. 2011).

Traditionally, geopolitics has focused its attention on the availability and control of territory, raw materials and transport routes. Following the Industrial Revolution, each major technological wave has redefined what constituted strategic resources: coal and iron in the 19th century, oil and electricity in the 20th — always something tangible. It was only towards the end of the last century, thanks to improvements in the quality of semiconductors, that data came to be seen as a resource to be capitalised upon (Negroponte, 1995).

Knowledge therefore has geopolitical significance today. Alongside security, production and finance, it is a form of structural power (Strange, 1994). It is a resource with distinctive characteristics that set it apart from others. It is cumulative, inexhaustible, shareable and multiplicative. Furthermore, it cannot be physically opposed but only hindered from an institutional standpoint, that is, through targeted actions as a political choice. Finally, it is a multifaceted resource in that it encompasses a dimension linked to communication, one to information and one linked to technology. This is why control over these dimensions enables the exercise of power.

Moisio (2018) takes this further with the notion of knowledge-based economisation. States, on this view, no longer compete for territory or raw materials but for control over the global networks through which knowledge and information flow. What counts is control over the strategic nodes of these networks — elite universities, leading research centres, technology clusters, digital platforms, key patents — and over the flows of talent and innovation that move through them. This is what confers influence, and ultimately power, on those who hold it.

This is why knowledge is of strategic importance since, as mentioned, it is through knowledge that wealth is produced and, consequently, power is exercised in contemporary global society. On the basis of these considerations, the geopolitics of knowledge takes on an autonomous analytical character and, as such, becomes a fully-fledged sociological category concerning the processes of development and globalisation.

4. The mechanisms of conversion: how knowledge becomes power

The transition from the ability to generate knowledge to geopolitical power is not automatic: it requires identifying the specific mechanisms through which cognitive capacity is converted into structural

advantage in the international system. The four mechanisms outlined below are not an exhaustive taxonomy of all possible knowledge-power linkages; rather, they are selected on the basis of two criteria. Each mechanism had to be directly relevant to AI competition — to operate in knowledge-intensive, digitally networked economies — and each had to rest on established work in international political economy, from Strange’s structural power to Farrell and Newman’s weaponized interdependence, so that the argument builds on documented dynamics rather than speculation. The four then form a conversion chain: foundational knowledge is produced, the infrastructure that distributes it is controlled, the standards that govern it are set, and the talent networks that renew it are sustained.

The first mechanism is standard-setting power. Those who produce foundational technology define its global technical standards. Bütte and Mattli (2011) show how those who succeed in creating and establishing their own technological innovation and imposing it as a standard — think of Apple when it invented the desktop and the mouse for PCs — generate lasting structural rents. In the field of AI, those who produce the foundational models dictate the protocols, formats and interfaces upon which everything else is built: dependence on American standards — TensorFlow, PyTorch, CUDA — is today comparable to dependence on British industrial standards in the 19th century.

The second mechanism concerns control of infrastructure (Farrell & Newman, 2019). Those who manage it are in a position of strength compared to those who merely use it. The global networks on which the economic efficiency of the globalised world depends constitute a form of weaponised interdependence. For example, the major American cloud providers ‘host’ and manage data and information flows from many companies across numerous countries that pass through their systems; consequently, those who control this cognitive infrastructure possess this data, can use it as they see fit, and impose their own conditions regarding its use by third parties.

The third mechanism is epistemic authority. Those who produce the dominant scientific and technological knowledge acquire the ability to define what matters, how one should operate, what the problems are, and how they should be solved. The benchmarks used to measure AI — the Stanford HAI Index, MLCommons, HELM — are produced by predominantly North American institutions: whoever defines the benchmarks ‘wins’ the technological competition.

The fourth mechanism is the attraction of talent. Trained human resources with experience in cutting-edge fields of technological knowledge represent a strategic asset not only for their ability to deliver but also for the relational and reputational capital that such resources embody and bring with them. As studies on brain drain/brain gain (Docquier & Rapoport, 2012) and the knowledge diaspora (Saxenian, 2006) demonstrate, talented individuals transfer not only knowledge and potential but also exert a form of influence linked to their reputation. Talented individuals therefore represent a structural advantage measured by the benefits they can bring to the organisation that welcomes and promotes them.

Consequently, a country that does not produce researchers, does not invest in research and development, and does not care for the training and development of its manual and intellectual workforce is not only less competitive; it also risks becoming dependent on others in strategic sectors, condemns itself to economic and productive marginalisation, and causes the impoverishment of its own population.

This phenomenon recalls the notion of structural dependence theorised by Cardoso and Faletto (1979), which was long debated in the sociology of development, particularly in the 1970s. At that time, structural dependence between core and peripheral countries within the global capitalist system was linked to the fact that backward, or rather underdeveloped, countries were technologically dependent on Western countries in the Global North, offering raw materials in exchange. The exchange between these two types of countries was an ‘unequal exchange’ (Emmanuel, 1969; Amin, 1973) for two reasons. Firstly, because the goods exchanged involved labour inputs with radically different rates of pay: workers in developed countries were paid much more than those in underdeveloped countries, for historical and institutional reasons; thus, in every commercial transaction, the latter exchanged with the former a value that was implicitly much higher than what they received. Secondly, the technological monopoly held by Western countries allowed them to reap technological rents, whilst peripheral countries remained trapped in low-value-added production, with no possibility of moving up the value chain. Although the historical context is very different today compared to half a century ago, the gap between the western countries and those less equipped from a scientific and technological standpoint persists, albeit with

altered characteristics. Similarly, it can be argued today that this dependence concerns the systems of knowledge production and validation. Consequently, countries lacking the technical capacity to develop knowledge autonomously are structurally subordinate to those capable of producing patents, setting technical standards and controlling digital infrastructure.

Having established the theoretical mechanisms through which knowledge formation translates into geopolitical power, it is now possible to assess how the major competing systems actually perform along these dimensions. The empirical evidence examined in the following section does not test the theoretical argument in a statistical sense — as clarified in the methodological note — but it does allow us to evaluate its plausibility against the best available comparative data on AI output, investment and workforce formation. The picture that emerges is one of structured asymmetry rather than open competition: the gaps are large, directionally consistent, and reinforcing in ways that the conversion mechanisms identified above help to explain.

5. Empirical findings: the global competition for cognitive supremacy

Turning now to the examination of global competition, we shall begin with the scenario outlined by the WEF (2025) regarding employment trends up to 2030. The projections paint a picture of intense turbulence. By 2030 some 170 million new jobs are expected worldwide, while around 92 million will be lost or radically restructured. The net balance is 78 million positions, roughly 7% of global employment. Yet these aggregates hide who wins and who loses. This echoes Acemoglu and Restrepo's (2019) account of how automation simultaneously displaces and reinstates labour: technological change is not uniformly favourable to workers, which calls for governance that targets the displaced rather than blanket optimism.

To obtain a comprehensive global picture of the state of AI in terms of skills acquired, scientific research and implementation (i.e. the number of patents), we have drawn on Stanford's HAI AI Index 2025 report. Using the data contained therein, which relates to 2023, it is possible to ascertain the influence that each power under consideration exerts in the field of AI and thus assess its geopolitical implications.

Table 1 shows that China holds a leading position in terms of scientific output and patenting in AI³; however, one should not assume that the quality of Chinese scientific research is unrivalled, as it is US scientists who produce the highest-quality research. As for Europe, whilst it demonstrates high-quality research, it is not a major player in terms of patents; the United States follows.

Table 1. Scientific output and patenting in AI by country/region (2023)

Country/Region	% of AI publications	% AI Citations	% AI Patents
China	23.2%	22.6%	69.7%
Europe	~21%	20.9%	Marginal
United States	~9%	13.0%	14.2%
India	9.2%	—	—

Note: Source: Stanford HAI, AI Index Report 2025, Chapter 1 (Research and Development); citation shares from Figure 1.1.7. Data refer to 2023⁴.

The patent concentration data are particularly significant from a theoretical standpoint. China’s 69.7% share of global AI patents directly instantiates the standard-setting power mechanism identified in Section 4: whoever holds the foundational patents in AI infrastructure effectively defines the protocols, interfaces and technical standards upon which subsequent innovation layers are built. Patents on this scale are not just output. They are leverage over the entire AI ecosystem. The US, meanwhile, leads on citation-weighted quality — the dimension closest to epistemic authority. The two powers, then, are not racing along the same track: they are accumulating different but complementary forms of knowledge-based power.

The investment asymmetry revealed by Table 2 maps directly onto the weaponised interdependence framework developed

3 The patent data refer to AI patents granted in 2023; the global total has risen from 3,833 (2010) to 122,511 (2023).

4 The shares above measure the volume of scientific and technological output, not its quality or impact. On quality-weighted indicators the ranking differs: over 2021–2023 U.S. institutions contributed the largest number of top-100 most-cited AI publications, and in 2024 they produced 40 notable AI models against China’s 15 and Europe’s 3. China’s leading shares and U.S. qualitative primacy are therefore not contradictory but capture two distinct dimensions of knowledge production — quantity and frontier quality — as discussed in Section 5

by Farrell and Newman (2019). Private AI investment is concentrated in a handful of US-based platforms. These same platforms are the global infrastructure through which data, algorithms and services flow. This double role — investor and conduit — produces a hub-and-spoke topology, and it is this topology that gives a few actors structural coercive power over the many who depend on them. Countries whose firms and public institutions depend on these platforms for their cognitive infrastructure are not merely economically dependent; they are epistemically dependent, in the sense developed in Section 4: their capacity to autonomously assess, regulate and develop AI is conditioned by access to systems they do not control. Europe’s marginal position in both private and defence-oriented AI investment compounds this vulnerability.

On investment the gap is even wider: US private AI funding is more than ten times China’s (\$109.1 billion against \$9.3 billion in 2024). And it is not only a matter of size but of direction: of its federal AI budget, the US channels roughly 75% to defence, against less than 1% in the UK. China is closing the quality gap fast, however, as DeepSeek V3 shows.

Table 2. Private and public investment in AI by country (2024, USD billion)

Country	Private AI investment	Public investment (infrastructure)	Defence share of public investment
United States	\$109.1 billion	Majority	75% of federal AI budget
China	\$9.3 billion	\$47.5 billion (semiconductors)	—
France	—	~\$117 billion (commitment)	—
UK	\$4.5 billion	—	<1%

Note: Source: Stanford HAI, AI Index Report 2025, Chapter 4 (Economy). Private-investment figures refer to 2024. The public-investment column is indicative rather than strictly comparable: entries refer to heterogeneous categories — total federal allocations (US), sector-specific programmes such as semiconductors (China) and announced multi-year commitments (France) — and should therefore be read as orders of magnitude rather than like-for-like values.

Finally, Table 3 shows the percentage of people by age group engaged in professional development and reskilling programmes. Whilst younger age groups are more heavily involved, the western countries record higher participation of older workers in LLL programmes.

Table 3. Participation in continuing education by age group in selected countries (%)

Country	35–54 years	55–64 years	Gap vs EU 2030 target (60%)
Sweden	>65%	>60%	Target achieved
EU average	48%	35%	-25 points
Germany	~45%	~32%	-28 points
Italy	~20%	<15%	-45 points
Greece	~12%	<10%	-50 points

Note: Source: Participation data: OECD/Eurostat Adult Education Survey (AES) 2023. EU 2030 target (60% of adults in training annually): European Pillar of Social Rights Action Plan (European Commission, 2021).

The participation gaps documented in Table 3 are not merely indicators of social policy underperformance; read through the theoretical lens developed in Sections 3 and 4, they constitute a direct measure of geopolitical vulnerability. Italy’s deficit of approximately 45 percentage points relative to the EU 2030 target — and Greece’s of 50 points — represents the concrete empirical manifestation of what this paper terms epistemic dependency risk: a structural condition in which the most numerous and experienced cohort of the active workforce is systematically excluded from the knowledge renewal processes that determine a country’s capacity to generate, absorb and deploy AI-driven innovation. Countries at this end of the distribution are not merely less competitive. They are handing over the cognitive infrastructure of their production systems to external providers. At the level of the workforce, this reproduces the dependency dynamic that Cardoso and Faletto (1979) traced in the technological exchange between core and peripheral economies.

Turning now to the most in-demand skills, we will refer to the WEF surveys (2023). These identify the skills most in demand for the period 2025–2030: analytical thinking (considered essential

by eight out of ten employers); resilience and adaptive agility; creative thinking; social and leadership skills; epistemic curiosity. This skills profile is theoretically significant beyond its immediate labour market implications. Why do employers rank analytical thinking, adaptive agility and epistemic curiosity so highly? Sections 3 and 4 suggest why: value now sits where machines are weakest. As routine, codifiable tasks shift to machines, the human edge narrows to what neither AI nor short technical courses can easily reproduce — judgement, the ability to read context, creative recombination. That employers' priorities line up with this paper's argument is telling. It means the geopolitical stakes of lifelong learning do not stop at frontier research and elite STEM: they run across the whole workforce, including, as Section 6 argues, its oldest and largest cohort. AI and data literacy matter more and more, but they sit alongside human skills, not in their place.

Conversely, repetitive and manual tasks — that is, those that can be automated — are seeing their scope of application gradually narrow. Almost a quarter of the companies surveyed by the WEF expect to phase them out over the next five years.

In conclusion, we can see that the necessary training programmes must foster the development of cognitive abilities and reinforce learning beyond technical skills. The difference between the two types of skills is that technical skills, although subject to rapid obsolescence, can be quickly replaced or bridged, whereas critical-analytical skills and soft skills involve more structured and complex pathways and therefore require greater care and attention (OECD, 2023b). In practice, this means helping people adapt to new tasks and relationships, recognise what they need to learn, and manage their own experience — because the labour market increasingly leaves these choices to the individual.

As highlighted by Castells (2010), the ability to generate and manage innovative knowledge systems will acquire growing importance in the 21st century, not only in economic terms but also in terms of the capacity to exert influence and power. It is therefore not merely a question of having a suitably trained workforce capable of performing technically complex and sophisticated tasks, but of possessing human capital capable of developing innovation. The significance of this aspect lies in the fact that, in this way, particularly for peripheral countries in the Global South, it is possible to break the chain of dependence on centralised nations (Connell, 2007),

thereby realising their potential, producing innovation in a creative and non-predetermined manner, providing alternative solutions, and ultimately expanding the supply of goods and services for the benefit of humanity.

6. Older workers: risks and resources

The theoretical framework developed in Sections 3 and 4 and the empirical asymmetries documented in Section 5 converge on a paradox that is particularly acute in high-income OECD economies: precisely the workforce cohort most exposed to AI-driven skill obsolescence — workers aged 45–64 — is the one most systematically excluded from lifelong learning provision, as the participation gaps in Table 3 already indicate. Why does this exclusion persist, and what does it cost geopolitically? Answering means looking at two things: the demographics of an ageing population, and the barriers older workers face in reaching training. The labour market has to adapt, and older workers should be the first beneficiaries of upskilling policies — not the last. Active ageing has, after all, been on the agenda for years (Rojo-Pérez & Fernández-Mayoralas, 2021).

However, older workers are exposed to various forms of ageism (Butler 1969; WHO, 2021), namely forms of discrimination based on cognitive stereotypes, emotional biases and generationally based discriminatory behavioural practices (Nelson, 2002; Cuddy et al., 2005; Ayalon, Tesch-Römer, 2018). In the workplace they are considered less adaptable and less productive (van Dalen et al., 2010); training them, as a result, is seen as unprofitable and rarely offered. Obviously, the reduction in training opportunities for these workers is not only detrimental to their professional development but also has negative repercussions for the entire organisation.

Older workers face a set of real obstacles to training: family responsibilities, health, reduced mobility (Bianco 2021). Supporting their learning means making it flexible, modular and psychologically supported (Charness & Boot, 2009); it also means workplaces that encourage it and reduce age-related stigma. This would help recognise older workers as a strategic asset — within organisations and, increasingly, in geopolitical terms — not only for their experience but for the relational skills they bring: communication, emotional intelligence, creativity, critical thinking, problem-solving and leadership (WEF, 2025). Amid global tensions, economic uncertainty

and demographic change, these are precisely the transversal skills employers most want.

This matters because innovation needs people who can handle it technically and relationally, not just technically. New technologies will transform work, simplify duties and tasks, and shift the added value of the worker towards dimensions that are increasingly less codifiable and increasingly linked to ‘interpersonal skills’: self-control, the ability to manage independently, and situational intelligence. Significantly, these are skills that develop with experience and are more characteristic of senior staff.

In this regard, it has been observed that artificial intelligence tends to replace formal knowledge and codified skills — typical of workers with little experience — more easily, whilst leaving the tacit knowledge, judgement and interpersonal skills of experienced workers largely intact (Bianco, 2021). It follows that retaining older workers in the workforce is not merely a matter of the sustainability of the pension system, but a strategic choice aimed at preserving human capital that is difficult to replicate. This capital passes on mainly through intergenerational mentoring. When older workers mentor younger colleagues, knowledge cascades through the firm and feeds its competitiveness — and, in turn, the country’s (WEF, 2025).

The opposite risk — that of failing to capitalise on this asset — is already well documented: the loss of tacit knowledge resulting from mass retirement generates structural financial and organisational challenges, reducing the competitive capacity of national systems in global markets (Burke & Ng, 2006; Streb et al., 2008). From this perspective, countries that are able to harness the skills of older workers throughout their working lives will find themselves at an advantage in global geopolitical competition, as they will be able to combine technological advancement and mature human capital in ways that no form of automation can fully replicate.

Data from Eurostat’s Adult Education Survey (AES) confirm that the barriers to participation in training are structural and varied. At European level, conflict with working hours represents the main barrier in 2022 (39.6% of workers), surpassing costs and family responsibilities. The North-South divide remains marked: in Italy and Greece, family responsibilities prevent 49.9% and 58.6% respectively of workers aged 45–64 from undertaking training, compared with 14.1% in Denmark and 12.8% in Finland. Women are consistently more disadvantaged than men, and employer-sponsored

training funds almost 90% of men's learning compared with 84% of women's. These figures show that older workers are not passive in the face of the challenge of reskilling: they are held back by structural conditions — organisational, family-related and institutional — which individuals cannot overcome on their own. These figures give concrete institutional content to the participation gaps already visible in Table 3: the deficit is not a matter of individual motivation or cognitive capacity, but of structural conditions — organisational, family-related and policy-related — that systematically disadvantage the cohort whose geopolitical strategic value this paper has argued is highest.

Older workers should be kept active above all because they are a valuable resource within organisations. Their experience makes them well-suited to tutoring and mentoring, passing knowledge across generations (Harvey 2012; Tempest et al. 2002; Tambaum 2023) — even where AI dominates. They are also the ones who can fill roles demanding complex judgement and communication. And one question remains under-explored: what skills ensure that human intelligence guides AI, rather than the reverse? And obviously, countries that have a workforce and a civil society better prepared in this area will enjoy a competitive advantage over others, both in terms of economic and productive output and in terms of quality of life and social sustainability regarding the impact of new technologies.

7. Concluding remarks

This paper has made three claims. In the age of AI, lifelong learning is not just labour-market policy; it has become a geopolitical resource, not only an economic one. It then looked at the skills companies expect to need by 2030, and at older workers in particular — at their soft skills and their ability to pass knowledge on. As populations age, especially in high-income economies, older workers are a group worth investing in. Their experience also makes them natural mentors and coaches, to the organisation's benefit.

We have also shown that lifelong learning is not merely a best practice within active labour market policies (ALMPs) that forms part of active ageing but must now be regarded as a matter of power. Today, cognitive and interpersonal skills, alongside their technical content, take on a strategic character. The countries capable of

generating knowledge will be those that, in the 21st century, assume leadership positions not only from a technical, scientific and productive perspective but also in terms of global power. Otherwise, they will be dependent on others' knowledge production systems.

What emerges, therefore, is first and foremost the need to deepen research in this field, conducting more detailed comparisons between countries. In this way, it will be possible to highlight the levels and quality of training for workers, and in particular for their more mature workforce, as well as to identify potential institutional models for upskilling policies. Finally, the role of multinational enterprises and innovative entrepreneurship deserves more explicit theoretical attention than the generic category of 'businesses' typically receives in the lifelong learning literature. MNEs play a double role: they are the main private providers of continuous training and, at the same time, the main beneficiaries of the skilled workers that training produces. As Rikap and Lundvall (2021) show, their innovation systems work as transnational knowledge networks — they draw value from the human capital that national education systems form, while doing little to renew it. This has a direct geopolitical effect. Where a country's innovation system is run largely by foreign subsidiaries rather than home-grown firms, the incentive to invest in training weakens, because part of the payoff flows abroad. The opposite holds where innovative firms have strong domestic roots — the Nordic countries are a case in point: demand for skilled workers pulls public investment into lifelong learning, and the two together build national strength. Upskilling policies should therefore pay attention to who owns the firms they subsidise, so that the value created by training stays in the country instead of being captured elsewhere.

In wartime this becomes especially clear. Russia's invasion of Ukraine and the crises in the Middle East have accelerated the technological decoupling between Western economies and their rivals. Ukraine is a case in point: forced to defend its sovereignty against the invasion, it went from a handful of drone manufacturers before the war to one of the largest producers in the world, in both quality and quantity (Atlantic Council, 2025) — a shift that demanded the rapid formation of new technical skills and an industrial base almost from scratch. This reverses the usual logic: the pressure on national training systems comes less from economic competitiveness than from the need to secure one's own survival.

The growing use of AI for military purposes has made life-long learning a strategic concern for national autonomy. Added to this is the shortening of global technology supply chains, which forces countries to become more self-sufficient — both in military technologies, a weak flank for a Europe that has relied on NATO for decades, and in a workforce trained to use them.

This problem is just as visible at the level of governance. The G7 Hiroshima AI Process (OECD 2023c) set up a framework to coordinate AI governance among advanced democracies, and the G7 Labour Ministers (G7 2024) named workforce upskilling a strategic priority in the face of AI-driven change. The G20, which takes in a wider set of economies including major emerging players, offers a further arena where the asymmetries traced in Section 5 — above all the gap between Western and Asian AI investment — might be addressed through cooperation instead of pure rivalry. So far these forums have produced declarations more than binding commitments, and that gap reflects the same tension this paper finds at national level: the difficulty of treating workforce formation as a matter of collective security rather than individual or firm-level adjustment.

Here sociology has much to offer. Its longstanding vocation lies on the operational level — training and employment policies, and organisational development — but it also speaks to the geopolitical one. On that level it provides a frame that addresses both the practical needs and the relational dimension of the actors involved, engaging their expectations, helping to strengthen social ties and to design a more sustainable and peaceful way of living together (Orlovic Lovren, 2023).

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Analysis of the ASEAN and Ukraine's Political Dialogue within the Framework of Russia's Large-Scale Invasion

Introduction

Since the onset of the twenty-first century and especially with the escalation of geopolitical conflicts in the world, the global political scene has undergone significant changes, including the reshuffling of global political alliances. February 2022 brought Russia's large-scale military action against Ukraine, reshaping world affairs. This conflict altered Ukraine's internal stability, financial systems, and defense planning. As a result, rethinking international relationships became necessary. Connections once centered on familiar allies shifted toward broader networks beyond established Western institutions. This diversification strategy has created a new interest in the regions that used to be less appreciated in the foreign policy of Ukraine, Southeast Asia. The need to expand diplomatic and economic links beyond the European region has been highlighted in the context of wartime diplomacy. The European Union is still the main economic and political partner for Ukraine, but the process and mechanisms to achieve this involve complex political procedures and lengthy decision-making processes.

Ukraine has been attempting to develop broader networks of international cooperation and focus on improving its political clout, broadening its economic ties, and further expanding its diplomatic ties. The ASEAN poses a critical partner and possible network for expansion for Ukraine, with its growing economy, influence, and over-all geostrategic importance. ASEAN has contributed significantly to the promotion of stability in Southeast Asia as well as economic cooperation and political dialogue. Volodymyr Zelenskyy fully approved Ukraine's foreign policy, where it is mentioned that the state is interested in participating in global Asian initiatives, especially in the establishment of economic and trade issues. Indonesia, Thailand, and the Philippines are states in the global markets that have significant exports, making them crucial partners for Ukraine's economy. Southeast Asia expanded their influence in the world by

the Treaty of Amity and Cooperation (TAC), which was established in 1976 to promote peace. Ukraine started the process of joining the agreement back in 2017, but it was hard to move from the dead point to be a part without gaining the trust of ASEAN about its importance. With the initiation of the war in Ukraine, the Ukrainian Parliament ratified the accession to the treaty, which made relations more formal and also made a huge step towards the Sectoral Dialogue Partnership.

In recent years, ASEAN gained recognition through ties with major global partners beyond Southeast Asia - among them the EU, the United States, China, and Japan. Starting in 2013, Ukraine began shaping its engagement by naming a dedicated representative focused on ASEAN matters. That didn't spark immediate economic ties. Instead, Ukraine's strategy with the ASEAN was a gradual development as it navigates the potential for economic and diplomatic ties. This was particularly emphasized during the 2010s and early 2020s, when Ukraine's Ministry of Foreign Affairs began promoting its "Asian direction" in its foreign policy agenda. This was aimed at increasing Ukraine's presence in Southeast Asian economic and political forums while reducing its economic dependence on European economic structures.

Nevertheless, one clear sign of shifting ties between Ukraine and ASEAN emerged when Kyiv joined the Treaty of Amity and Cooperation in Southeast Asia. Originally signed in 1976, this agreement aims to support mutual respect among Southeast Asian states along with their right to self-governance. While rooted decades ago, its principles still shape regional diplomacy today. Over time, this treaty has come to be considered a very important tool through which other nations can seek diplomatic relations with Southeast Asian nations. Ukraine's accession process to this treaty commenced in 2017 when Ukraine realized how important this treaty was in allowing Ukraine to gain access to Southeast Asian institutions. The process of accession, however, involved diplomatic negotiations with the Southeast Asian nations to gain their trust.

The ratification of Ukraine's accession to the Treaty of Amity and Cooperation was an important milestone in the development of ASEAN-Ukraine relations. Following the full-scale war in 2022, the parliament of Ukraine ratified the treaty providing institutionalized

relations with ASEAN and prospects for developing diplomatic relations with the region. Ukraine's ambition is to develop relations with "non-traditional" countries in the Global South, as well as to expand a network of diplomatic relations with all countries of the world. I suppose that Ukraine can also economically benefit from ASEAN. These days, countries such as Indonesia, Thailand, and the Philippines are some of the fastest-growing economies worldwide and have substantial commerce networks. Ukraine has significant economic prospects with these countries, especially in the sectors of agriculture, metallurgy, and energy resources. What's more, there is the aspect of regional integration initiatives by ASEAN, which provide opportunities for economic cooperation that could be potentially useful in Ukraine's post-war development and reconstruction.

Statement of the Problem

The changing global geopolitics in the aftermath of Russia's full-scale invasion of Ukraine has created new dynamics in international diplomatic relations and strategic partnerships across the globe. The changing global politics have created new challenges for Ukraine's foreign policy, which has been compelled to seek greater international support in all aspects of politics, economy, and security. Although Ukraine's relations with its strategic partners, such as the European Union and the USA, are of vital importance, the changing global politics have created new challenges for Ukraine's foreign policy, which has compelled it to seek greater international support from new strategic partners outside its conventional geopolitical circle. In this regard, Southeast Asia and ASEAN have become new potential strategic partners for Ukraine's foreign policy.

Although ASEAN has become a vital player in global politics, the changing dynamics of Ukraine-ASEAN relations have not received sufficient attention in the broader academic literature on Ukraine's foreign policy. Most scholarship on Ukraine's foreign policy focuses on Ukraine's strategic partners, namely the EU, NATO, and its neighbors in the European region.

The role of Southeast Asia as a strategic partner of Ukraine has received little attention whatsoever from scholars. I gather that Ukraine can use ASEAN as a framework to improve its position.

The war has made it clear that Ukraine needs to consider forms of international diplomacy, hence Ukraine's relations with ASEAN can help it achieve this goal. Firstly, Ukraine's accession to the Southeast Asia Treaty of Amity and Cooperation has presented Ukraine with an opportunity for cooperation with ASEAN through its framework. The treaty is an important platform for dialogue, cooperation, and conflict resolution and is thus an important platform for integrating external actors into the ASEAN regional diplomatic framework. The implications of cooperation between ASEAN and Ukraine are thus an important aspect for consideration, as are the potential benefits that may arise from such cooperation.

Thus, in this regard, it is important to note that the main research question in this study is centered on comprehending the motivations, dynamics, and outcomes associated with Ukraine's relations with ASEAN in the backdrop of Russia's full-scale invasion. In this regard, it is important to note that this study has also attempted to address the following main research question:

Why has Ukraine's cooperation with ASEAN increased in the backdrop of Russia's full-scale invasion, and what strategic advantages this cooperation provides?

However, in order to address this main research question, a number of supporting sub-research questions have also been addressed in this study. First and foremost, this study has attempted to address the historical background with respect to Ukraine's relations with ASEAN and has identified a number of diplomatic events that have played a crucial role in this regard.

Secondly, the study seeks to examine the role of ASEAN-Ukraine collaboration in the larger context of geopolitics and economic strategies in times of war. Ukraine, in a bid to strengthen its international alliances and create new economic opportunities beyond the confines of the European region, can find ASEAN a useful ally in the diversification of trade and the development of new regional cooperation initiatives.

Thirdly, the study seeks to examine the benefits that both Ukraine and ASEAN can derive from the context of the Treaty of Amity and Cooperation, in terms of the political, economic, technological, and socio-cultural aspects of the relationship that can emerge as a function of the new dynamics of diplomacy between the two parties. From an analytical perspective, it should be noted that the research has been designed with reference to two main variables.

Ukraine's foreign policy has been greatly affected by the invasion of Russia, which serves as the independent variable. The West's geopolitics led to a reset of Ukraine's foreign relations. It also sparked diversification in Ukraine to the East.

The dependent variable of this research is the evolution of political dialogue between Ukraine and ASEAN. The research aims to assess the evolution of political dialogue between Ukraine and ASEAN by examining the diplomatic interactions between the two entities within the context of Ukraine-ASEAN relations. Through the examination of the variables and the research questions, the study seeks to make a contribution to the development of a deeper level of understanding regarding the ways in which geopolitical crises can influence the reshaping of international diplomatic networks and the encouragement of new strategic alliances in new regions of global politics.

Statement of the Research Objectives

This research paper looks into how Ukraine's ties with ASEAN have evolved since Russia launched its full-scale invasion. Shifting global dynamics pushed Kyiv to reshape its foreign strategy in noticeable ways. New priorities emerged, pulling attention toward regions outside Western partnerships. Due to the pressures brought upon by the Russian Invasion, it is hereby argued that it was the catalyst for Ukraine to look for partners beyond the immediate region. The ASEAN as a strategic partner gives Ukraine much-needed economic and political partners that are comparatively more responsive and open than those in the EU and the West. Regional influence plays a role here as dialogue today reflects changed realities rather than old assumptions.

Starting back in 2013, official political ties began between Ukraine and ASEAN. However, connections didn't appear overnight – instead, they've grown slowly over time. Thus, it is important to understand the development of the relations between the two actors to assess the way the relations have developed from limited political dialogue to a strategic partnership.

Another significant objective of this research is to identify and analyze the significance of ASEAN as an alternative source for Ukraine's diplomatic and economic relations. Traditionally, Ukraine's foreign policy has emphasized its relations with Western

countries and international organizations such as the European Union and NATO.

Due to the problems caused by the continuing conflict, understanding how ASEAN connects with Ukraine matters more now – its economy is expanding, while its role on the global stage slowly rises. Though weighed down by war, Kyiv's position pulls attention toward Southeast Asian ties that weren't always seen as vital. With shifts in power dynamics, old assumptions fade; fresh looks at partnership become necessary. A nation rebuilding brings new angles into view. Relationships once distant now carry weight simply through timing and circumstance.

The paper also analyzes the key role of the Treaty of Amity and Cooperation in Southeast Asia in terms of collaboration between ASEAN and Ukraine. By joining the TAC, Ukraine marks a turning point in its diplomacy across Southeast Asia. Now part of TAC, Ukraine accepted ASEAN's way of handling diplomacy. This move quietly unlocked fresh chances to talk and work together inside the existing framework. It is essential to emphasize that the main aim of the research is to identify the possibilities offered by Ukraine's participation in TAC in order to facilitate its cooperation with ASEAN in the political and economic fields.

Finally, it is essential to identify the benefits that can be derived from the cooperation between ASEAN and Ukraine, which will be achieved by analyzing various aspects, including political assistance in international organizations, economic cooperation in trade and agriculture, and cooperation in the field of technology, which will help to identify whether ASEAN can become an alternative partner for Ukraine in the context of the geopolitical crisis in which the latter is involved.

Significance of the study

What makes this research matter is how it opens a window into new kinds of diplomacy Ukraine is building outside its usual circles. Instead of only hoping for support from Europe and NATO, Ukraine had to review another options because relying solely on old alliances wasn't enough anymore. The moment Russia invaded its neighboring country changed many things. As a consequence, Kyiv was forced to pursue new paths which had to be carved quickly, under pressure and, unfortunately, without any guarantees. Although Southeast

Asia is becoming increasingly important in international politics, the number of academic studies on Ukraine and ASEAN relations is still low. The majority of the existing academic studies on Ukraine's foreign policy have primarily focused on Ukraine's relations with the European Union, NATO, and its neighbors in Eastern Europe. The role of ASEAN as a potential strategic partner for Ukraine has not been adequately analyzed in the existing body of academic studies on Ukraine's foreign policy.

Contemplating how Ukraine shapes its talks with ASEAN reveals something missing in most academic work on Ukrainian foreign policy. With shifting global power lines, it becomes clearer why studying this partnership matters. ASEAN stands apart from EU and it is mainly because of its dissimilar way of handling diplomacy. Through this lens, relations between Kyiv and Southeast Asian nations open up new ways to think about statecraft for countries without major influence. Such connections gain greater meaning as more regional groups take active parts in world decisions.

In addition, it should be noted that this research provides a contribution to the overall discussion on diplomatic practices within the Global South. ASEAN has evolved into one of the most powerful regional organizations on the planet. The economic and political influence of ASEAN has made it a major player on the international scene. Thus, Ukraine-ASEAN relations provide a window of opportunity for understanding the possibilities of using the diplomatic practices of regional organizations from the Global South for states that experience geopolitical crises.

In addition, the results of the current study can be useful for political decision-makers and diplomats engaged in the formation of the foreign policy strategy of Ukraine. Gaining an understanding of the possible benefits and limitations of cooperation with ASEAN can assist political decision-makers in discovering new opportunities for political communication, economic cooperation, and technology exchange. In this respect, the current study can be seen as a contribution to the discussion of the diversification of Ukraine's international relations.

It should be noted that the current study can be seen as a new look at the foreign policy of Ukraine, as it deals with the possibility of using the assistance of non-European actors to diversify Ukraine's international relations and broaden the scope of Ukraine's international diplomacy. As it was mentioned above, the current study deals

with the relatively under-researched topic of the relations between Ukraine and ASEAN. Thus, the current study can be seen as a contribution to the broader field of international relations.

Scope and Limitation

The research looks into how Ukraine and the Association of South-east Asian Nations build ties as it faces uncertain futures due to the Russian invasion. Centrally, it will look into the progression of ties between ASEAN and Ukraine following Kyiv's direction of accelerating and broadening its diplomatic reach beyond Europe and the West. The Treaty of Amity and Cooperation will hereby be analyzed liberal institutionalism as a primary lens of inquiry. Studying Ukraine's strategy through the TAC exposes paths on how diplomacy organically develops between non-traditional regional neighbors.

Another angle of the research explores how Ukraine engages economically and politically with different nations across Southeast Asia. Focus lands on practical areas like farm product shipments abroad, spreading trade beyond current partners, and opportunities emerge for placing Ukrainian goods in fresh commercial spaces. Besides that, the study will be looking at diplomatic actions and their intended effect on presence.

The timeline of the case research is set from 2017 through to 2025, where the partnership gradually flourished from the initial talks with Southeast Asia representatives to its acceleration in 2022, when Ukraine prioritized extensive diplomatic projects outside Europe.

Nonetheless, certain limitations need to be taken into account as well. Firstly, the study does not examine the analysis of Russia's diplomatic strategy in relation to ASEAN or Southeast Asia. Although it can be a determining factor in the geopolitical scenario, it is beyond the main focus of the study, which is based on the foreign policy strategy of Ukraine. Secondly, the study does not examine the relationship between Ukraine and other regions of Asia, such as East Asia or even South Asia. The focus is limited to the relationship between Ukraine and ASEAN for better clarity.

Methodology

The present research will use a mixed approach in order to offer a comprehensive analysis of the political dialogue between Ukraine

and the Association of Southeast Asian Nations within the period of Russia's large-scale invasion. The methodological approach will use qualitative and descriptive analytical techniques along with specific features of foreign policy analysis and case study research. Despite the use of various kinds of data in the present research, the overall approach will be qualitative, as the main goal is to comprehend the overall political dialogue and strategic interests behind Ukraine's diplomatic engagement with ASEAN. The main methodological approach used in the present research is the case study method. The present research will use the case study method to analyze the development of Ukraine and ASEAN's relations as a case to comprehend the strategic interests behind the diplomatic engagement of countries facing geopolitical crises in the region. Apart from the use of a case study, the study will also use foreign policy analysis to understand the changes in the foreign policy of Ukraine in the wake of the full-scale invasion of Ukraine by Russia. The use of foreign policy analysis will help the researcher understand the various reasons, goals, and objectives that influence the foreign policy of Ukraine in relation to ASEAN. Furthermore, the study will use descriptive analysis to understand the available empirical evidence in relation to the cooperation between ASEAN and Ukraine. The use of descriptive analysis will help the researcher to understand the developments in the relationship between the two actors in the past.

The data used in this research is derived from a number of important sources. Firstly, official government announcements and diplomatic communications from Ukrainian authorities help us understand what Ukraine's strategic objectives are. Secondly, documents and reports produced by ASEAN institutions are also important in this regard, as they provide valuable information on how this organization has established a framework for regional cooperation. Finally, trade statistics and economic reports are also used in this research in order to analyze the economic aspect of Ukraine's relations with ASEAN, particularly in terms of agricultural trade. Finally, this research also relies on scholarly publications on regional cooperation, international diplomacy, and ASEAN's role in international politics in order to gain a more comprehensive understanding of Ukraine's relations with ASEAN and its strategic importance in the current international system.

Ukrainian Pragmatism and the Treaty of Amity and Cooperation (TAC)

This research is based on three selected key concepts in international relations that provide an understanding of the motivations and dynamics behind the development of diplomatic relations with Ukraine and ASEAN states. In this context, this research draws on three theoretical concepts: realism, liberal institutionalism, and soft power theory. These concepts provide an all-encompassing theoretical basis for understanding the motivations behind Ukraine's expansion of diplomatic relations with ASEAN states and how this might be affected in light of global geopolitical dynamics.

Following realism, states are assumed to pursue self-interest and desire to maximize power and survival. Security and competition are common themes within an anarchic international order, giving priority to diplomatic ties, strategic linkages and alliances. In the context of Ukraine, Russia's large-scale invasion has dramatically changed Ukraine's geopolitical dynamics and made it imperative for it to enhance its international relations and strategic partnerships. As a result, Ukraine has attempted to strengthen its connections beyond the traditional Western alliances and establish connections with actors based in other parts of the globe. ASEAN, as a political entity with a developing political influence, represents a viable opportunity for Ukraine to strengthen its international political support and diversify its political alliances.

The main theoretical approach to the study of the subject of the research paper is liberal institutionalism. Liberal institutionalism focuses on the role of international institutions and organizations in facilitating interstate cooperation. Talk among nations gets easier when there are groups helping them stay in touch, see each other more clearly, because of shared rules plus common promises. ASEAN and Ukraine, through the TAC, enable the partnership as a precursor to further diplomatic ties. The decision of Ukraine to sign shows its commitment to further dialogue and exploring multilateral partners.

Another level of the research looks at soft power – a term Joseph Nye came up with – highlighting how countries can sway influence without coercion or force. Cultural diplomacy plays a significant part in this analysis through shared experiences and personal exchanges. Soft power in this analysis points to

how influence is shaped and cascaded. Contrary to hard power, Ukraine focuses on art, education, and innovation as its core focus in bridging with Southeast Asia. The accumulated efforts are aimed at creating spaces for sustainable partnerships alongside bilateral more tangible economic exchanges.

Analyzing Ukraine-ASEAN ties through the aforementioned provides a better perspective. Realism draws the backbone of war time diplomacy and the urgency to create bonds with other actors. On another level, liberal institutional views show how deals like the Treaty of Amity and Cooperation help deepen talks between regions.

Furthermore, the study establishes the relationship between the significant variables that affect the development of political dialogue between Ukraine and the Association of Southeast Asian Nations (ASEAN). The conceptual framework is founded on the assumption that significant geopolitical events can significantly alter foreign policy strategies, thus encouraging countries to develop new political partnerships with other countries in the world.

What stands out is how the research builds from one clear event – Moscow’s full invasion of Ukraine. That shift flipped what Kyiv puts first, especially in security, commerce, and who it talks to abroad. The war motivated Ukraine’s leadership for new paths of diplomacy who will be more open and proactive given the stalemate it has reached with its European neighbors and America under the leadership of Donald Trump. The abrupt shift in national strategy signals the urgency to recalibrate and deliver which prior to the war has been slower and more conservative. With the ASEAN, Ukraine gains more within a shorter timeframe and a stronger network and more diverse sources of influence and transnational partners. Relationships once distant now appeared strategically relevant. Security concerns outweighed historical preferences. Hence, cooperation widened in scope and geography. The war, in a sense, can be regarded as a catalyst for the foreign policies of Ukraine, thus encouraging the country to develop new political partnerships with countries in the world.

The next stage in the framework is the diversification of Ukraine’s foreign policy strategy. Looking beyond traditional allies, Ukraine turns toward new partnerships where shared interests open doors. A cluster of nations in Southeast Asia begins to matter more – not just economically but in developing how world rules take form.

ASEAN stands out as conversations grow louder about influence shifting southward. Quiet steps forward are taken through dialogue, not grand declarations. Attention shifts slowly, yet steadily, to what can be built when ties stretch across different regions. Among possible partners, these ten countries carry weight without needing the spotlight.

Ukraine, reaching out beyond its usual allies, started shaping stronger relations with ASEAN countries. Through track two diplomatic channels alongside official dialogue between officials and smaller regional campaigns, Ukraine was able to grow its trade links as manifested in the signing of the TAC. These diplomatic efforts translated to Kyiv's new window of influence globally with its new partners. What came from all this effort makes up the last piece of the picture. Outcomes show up in many ways – like stronger backing within global bodies, deeper trade ties, joint tech efforts, or wider military coordination. The point I am making is that a crisis can reshape how nations act abroad, nudging them to explore new kinds of collaboration together.

Beyond Europe and The West: Ukraine's Diplomatic Gamble

Recent literature on international relations has increasingly emphasized the significance of international diplomatic relations with non-Western countries and their organizations in global politics. In this context of changing geopolitics after Russia's invasion of Ukraine, ASEAN has been recognized as an important diplomatic force in global politics from the Global South perspective. A number of researchers have emphasized that ASEAN's dialogue mechanisms offer flexibility in international relations and contribute to international partnership diversification.

Kuik and Rahman (2023) suggest that ASEAN serves as a key tool in influencing regional diplomacy, strengthening its role within world affairs. Because of these structures, interaction occurs across various levels, linking the organization with neighboring states along with distant counterparts. Through such arrangements comes a measure of independence in foreign engagements, allowing smoother coordination beyond Southeast Asia. This type of institutionalized international relations offers opportunities for states from outside the region to develop diplomatic relations through ASEAN mechanisms.

Other authors also point out the increased importance of Southeast Asia as a strategic region in global diplomacy. Karmazin, Qiao-Franco, and Kolmaš (2025) explain: “ASEAN has been increasingly becoming more relevant in the changing Indo-Pacific geopolitical landscape.” The authors emphasize the importance of multilateral diplomacy and cooperation within the region, which means that the diplomatic activity of ASEAN goes beyond the interests of Southeast Asia and affects global governance.

Considering the foreign policy diversification in Ukraine, Southeast Asia has much to offer in terms of diplomatic and economic cooperation. Averianov (2024) underlines: “The Ukrainian foreign policy strategy in its engagement with ASEAN is part of a broader strategy to expand its diplomatic relations beyond its traditional Western alliances.” The author continues: “The Ukrainian foreign policy strategy, under its so-called ‘New Horizons Policy’ in the region, is to engage its Asian partners in order to diversify its economic and political relations.” A key player in Southeast Asia, ASEAN shapes global governance in ways that align with Ukraine’s diplomatic priorities. Its influence draws Kyiv toward closer coordination on international issues.

The ASEAN and the collective nature of decision-making carry regional significance with global impact. Ukraine’s engagement with the regional collective stems from shared interests that can be expanded beyond political and economic ties. In choosing to engage with ASEAN, Ukraine positions itself efficiently by creating bridges multilaterally with various countries, with the regional organization serving as an entry way. The relationship also furthers Ukraine’s global positioning as a global actor beyond Europe, as it creates trust beyond its immediate borders, fostering sustainable and novel diplomatic channels.

One step at a time, deeper links emerge between ASEAN and Ukraine, observers note. Lately, policy discussions have turned more sharply toward these connections. A paper titled “Ukraine-ASEAN: Vision of Cooperation” sets out what Kyiv aims to achieve across sectors. Instead of stopping at official talks, the vision pushes into areas like agriculture, digital progress, and mutual trade gains. Both ASEAN and Ukraine benefit bilaterally with knowledge and cultural engagements, furthering understanding in both parties alongside much-needed economic channels. Such moves may support balance and progress within

the region, according to analysis issued by Ukraine's Ministry of Foreign Affairs in 2023.

Cooperation between ASEAN and external actors is also considered a successful example of Global South diplomacy. In this regard, it has been emphasized by researchers that regional organizations in the Global South are now important actors in international diplomacy. Despite differing goals, such groups help bridge communication across varied participants. According to Chytoupoulou (2024), ASEAN has been open in creating partners outside the region, utilizing track two diplomatic channels, and ASEAN serving as a platform for dialogue for collaboration.

The literature points out that ASEAN serves and functions as a tool for diplomacy that actively engages its member states and those outside the region. As the urgency of war serves as a catalyst for Ukraine to look for unconventional diplomatic channels and partners, ASEAN is a clear alternative for diplomacy and a link to the developing world. Though not a perfect organization, with criticisms of its unique peculiarities, such as consensus-driven decision making that sometimes ends with policy gridlock, the benefits of having a collective institution have carved out a niche for the region in the global arena.

Yet, Rüland (2024) suggests ASEAN's reaction to Russia's attack on Ukraine reveals how Southeast Asian nations handle diplomacy with practicality. Right after the conflict began, the group's foreign ministers called for a quick halt to fighting – alongside talks – Rüland notes. Even when careful, they stood together without openly picking a position. Still, members of ASEAN did not align themselves politically against Moscow, given differing views across Southeast Asia on the conflict in Ukraine. Their way of handling big powers leans on practicality rather than rigid positions.

Kliem (2024) pinpoints that ASEAN often is conservative and balanced in diplomacy specially due to Ukraine's current situation. Neutrality is used by the collective as a hedging tool and bargaining chip. ASEAN signals a cautious engagement with Ukraine despite its proactive activities. Observers may expect alignment; instead, there is a pause. This hesitation reflects deeper strategic habits rather than momentary indecision. The Southeast Asian countries have preferred to engage in diplomatic dialogue rather than adopt any political approach in dealing with the war in Ukraine. The Southeast Asian countries have preferred to maintain diplomatic balance

in their foreign policy by dealing with Western countries and other global powers like China and Russia.

Another perspective on ASEAN's position in global politics is provided by Damayanti (2024), who explores how citizens in South-east Asia perceive the war in Ukraine. This study suggests attention exists toward the conflict in Ukraine, yet within ASEAN countries, such events are seen through a distant lens. Ukraine's agenda falls below the immediate needs of the region and is shaped by its geographic involvement, therefore altering its diplomatic strategies. Another factor may involve long-standing foreign policy approaches favoring non-alignment. So even though discussion occurs, urgency does not follow naturally among these states.

Given this, ASEAN's role has conflicting views, given its limitations as an organization, the impact of the regional organization should not be interpreted as an impact organization that directly alters global politics, but rather, as a tool for communication, arbitration, and diplomacy. One sees not a driver of change but a platform where discussions unfold. Its value emerges quietly, through access rather than authority. Effectiveness shows up not in outcomes but in opportunities opened.

Focusing elsewhere, some research looks at ASEAN's ties with external actors through familiar models. Not so frequent, yet built on established frameworks, such studies trace how nations interact beyond their boundaries. Unique in this space sits the Treaty of Amity and Cooperation in Southeast Asia – or TAC. Participants pledge no aggression toward fellow signers even as they respect every state's separate path. Dispute resolution without violence forms a core part of its principles. What matters here is the way it shapes diplomatic conduct across regions.

For outside players, joining the TAC is seen by analysts as key to shaping structured ties with ASEAN. The TAC offers a formal agreement between Ukraine and ASEAN, a definitive starting point for deepening ties, and not as an end goal. While serving as a symbolic agreement between the parties, the TAC is a diplomatic turning point for Ukraine and its diplomatic gamble outside Europe. The immediate benefits of the TAC carry no assurance; it should be understood as a starting point and reference for further consolidation of interests. On the contrary, the absence of the TAC weakens the framework for diplomatic action towards stable strategic goals. Being that ASEAN is away from the conflict, Ukraine was able to effectively create bridges without

biases. While projected to grow slowly, the TAC is an important part of Ukraine's new diplomatic direction, shifting away from Europe and the West and cementing new paths with non-traditional allies.

Furthermore, the TAC is more than a symbolic diplomatic gesture; it anchors the plurilateral direction that needs to be factored in when it comes to a multipolar world order. Even through war, Ukraine was able to create a new strategy in support of its efforts to be more relevant and visible on the world stage (Voice of America, 2022). The stability that ASEAN creates is a much-needed reprieve for a country that is in need of support. The participation of Ukraine in ASEAN is a deliberate effort to tap new partners. Longstanding norms gain weight because states follow them even when inconvenient. The document does not command - it invites patterned behavior over time. Stability grows slowly within these repeated gestures.

ASEAN's diplomatic culture sets a new tone with its practical engagement rhetoric and openness to other nations willing to engage in talks and discussions. The ASEAN's culture has been tested in a region where nation-states have had long-standing conflicts, and, albeit, it was able to effectively end conflicts with diplomatic pathways developed through time, trust, and consensus. The Observer Research Foundation (2023) supports this case as it highlights the collective's adaptive methods in diplomacy, making it free and maneuverable. The ability of ASEAN to engage multiple parties while keeping its interest center defines its importance of it as a regional success story.

In terms of regional diplomacy, the institutional mechanisms of ASEAN offer a vital opportunity for expanding international relations. The dialogue mechanisms of ASEAN offer external players the opportunity for political, economic, and technological cooperation with Southeast Asian countries. In this regard, for Ukraine, participation in ASEAN mechanisms offers a vital opportunity for expanding diplomatic relations, trade relations, and international visibility.

In summary, according to the analytical literature, ASEAN's institutional structures, such as the Treaty of Amity and Cooperation, play a vital role in facilitating diplomatic engagement between regional and external players. In this regard, for Ukraine, participation in ASEAN's institutional mechanisms offers a vital opportunity for expanding diplomatic relations and cooperation with Southeast Asian countries in the context of global geopolitical transformation.

Conclusion

Based on the analysis presented in this study, it is possible to conclude that the political dialogue between Ukraine and the Association of South-east Asian Nations (ASEAN) has gradually transformed into a multidimensional relationship that is influenced by geopolitical changes and Ukraine's necessity to diversify its foreign policy in the context of the ongoing war in Ukraine. The large-scale invasion of Ukraine by Russia has changed Ukraine's political priorities and has stimulated its search for new political allies beyond its traditional alliances in the West. In this regard, ASEAN appears to be a promising partner that may support Ukraine in its efforts to develop its international diplomatic network and expand its cooperation with Global South nations.

One of the most important findings of this study is that cooperation between Ukraine and ASEAN may bring Ukraine political benefits. With Ukraine seeking broader backing globally, talks with ASEAN could open new diplomatic paths. Despite the distance, the platform was able to bridge nations effectively, and efficiently. Engagement might shift how some regions view Eastern European security. From such early exchanges, fruitful cooperation will inevitably grow as it also reinforces ASEAN's position on the world stage.

ASEAN's involvement with Ukraine, although it can be considered gradual and conservative, Ukraine's willingness to reach out and collaborate is a long-term trajectory, not a short-term deal. Not rushing into stances allows space for ongoing diplomacy. Its approach draws attention without demanding it. Therefore, stability gains come not through bold steps but steady ones.

The economic diversification factor also plays an important role in the benefits associated with ASEAN-Ukraine cooperation. With rapid growth across its economies, Southeast Asia opens fresh avenues for farm goods and produce. Trade talks between ASEAN and Ukraine are key to defining the future development of the TAC. The focus of Ukraine on new alliances is a necessary route to find new markets and trade partners in an up-and-coming region. Wheat, maize, and vegetable oils -alongside iron shipments – fit into this picture well. Growing trade will undeniably expand the linkages in the region and has the potential to be expanded to more complex economic deals, transitioning to defense and heavy industry partnerships.

Transitioning to more complex deals, technology holds the most promise in expanding the alliance between ASEAN and Ukraine.

Moreover, knowledge exchanges and innovation linkages are substantial for long-term engagement in the technology space. Engaging the ASEAN in technology is an essential step for Ukraine to synergize and strategize for long-term impact. The TAC sets the narrative, and the path to advancement is through innovation and more complex economic products and industry commitments or networks.

As the study recommends, unfamiliar partners beyond borders is the next diplomatic frontier not only for Ukraine but also to other nations. Options multiply when talks shift southward instead of westward. For Ukraine, it's less about replacing old bonds than adding new ones. Meanwhile, ASEAN gains quiet influence without needing grand declarations. Their role grows simply by showing up differently on the world stage because even small steps reshape what's possible. In conclusion, diplomacy widens when nobody expects it to.

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Beyond Strategic Cooperation: Political Friendship and the Orbán–Netanyahu Relationship in Hungarian–Israeli Relations after 2010

1. Introduction

Hungarian–Israeli relations have undergone a marked transformation since 2010. Cooperation expanded in diplomacy, security, technology, and political communication, while Hungary became one of Israel’s most reliable partners inside the European Union. Structural explanations are indispensable: both governments sought greater room for manoeuvre, opposed external pressure, and benefited from cooperation in European and international forums. Yet these factors alone do not explain why the relationship acquired an unusually personalized, ideologically charged, and symbolically demonstrative character. The repeated presentation of Orbán and Netanyahu as trusted partners, their mutual defence during controversy, and the translation of personal alignment into visible foreign-policy decisions require an interpersonal level of analysis.¹

The article therefore asks two related questions. First, to what extent does the Orbán–Netanyahu relationship meet the criteria of political friendship? Second, how has this interpersonal relationship influenced the intensity and character of Hungarian–Israeli relations? The central argument is that the two leaders developed a hybrid form of political friendship. Their relationship contains observable elements of respect, reciprocity, loyalty, and shared political identification, but it is simultaneously embedded in strategic calculation and diplomatic performance. Emotional and instrumental explanations should thus not be treated as alternatives: in this case they operate together.²

1 Giampiero G., Ferrari F., Amadori A. 2009. With Friends like These: Foreign Policy as Personal Relationship. *Contemporary Politics* 15, no. 2. 247–264

2 Kaarbo J. 1997. Prime Minister Leadership Styles in Foreign Policy Decision-making: A Framework for Research. *Political Psychology* 18, no. 3. 553–581.

Maéva C., Sangar E. 2018. Researching emotions in international relations: Methodological perspectives on the emotional turn. Cham, Switzerland: Palgrave Macmillan. 1–13., 3–4., 3–13., 53–54., 54–56., 54–59., 57–73.

This argument contributes to the study of leader-centred foreign policy in two ways. It applies political-friendship theory to a contemporary bilateral relationship between materially unequal states, and it shows how interpersonal alignment can produce consequences beyond the immediate dyad. The relationship has affected Hungary's conduct in EU decision-making, assisted Israel's search for supportive European partners, and helped connect bilateral diplomacy to a broader sovereigntist and right-wing political network. The analysis focuses on developments from Orbán's return to government in 2010 through Netanyahu's visit to Budapest in April 2025. Earlier history is referenced only where it clarifies the scale of the contemporary shift.³

Most studies on Hungarian–Israeli relations explains the post-2010 rapprochement through strategic interests, ideological convergence, or the foreign-policy behaviour of illiberal governments. These approaches identify the enabling conditions of cooperation, but they tend to treat leaders as carriers of state or party preferences. The present study instead treats the Orbán–Netanyahu relationship as a potentially causal political relationship in its own right. The claim is not that personal friendship replaced state interests. Rather, repeated interaction and mutual identification helped select among available policy options, strengthened the credibility of commitments, and raised the symbolic value of supporting the other leader. This distinction matters because many governments share selected interests with Israel, yet few have translated them into a relationship as personalized and politically demonstrative as Hungary's.⁴

Hutchison E., & Bleiker, R. 2014. Theorizing Emotions in World Politics. *International Theory*, 6(3), 491–514.

3 Aron H., Holland E. 2024. Illiberal Leaders in the International Arena: The Cases of Hungary and Israel. *Journal of Illiberalism Studies* 4, no. 2. 59–77. <https://doi.org/10.53483/xcpw3576>.

4 Aron H., Holland E. 2024. Illiberal Leaders in the International Arena: The Cases of Hungary and Israel. *Journal of Illiberalism Studies* 4, no. 2. 59–77. <https://doi.org/10.53483/xcpw3576>.

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2. Political Friendship: Theory and Method

The „emotional turn” in International Relations challenged the assumption that foreign policy can be explained only through interests, institutions, and material power. Emotions are not simply private psychological states; they are expressed through language, symbolic action, practices of recognition, and durable patterns of interaction. This makes them accessible to empirical analysis without claiming direct knowledge of a leader’s inner feelings.⁵

Yuri van Hoef defines political friendship through five connected components. First, the actors recognize one another as equals in a relational and moral sense, even when their states possess unequal material capabilities. Second, the relationship is reciprocal rather than a one-sided patron–client arrangement. Third, it creates moral obligations, visible when support is maintained despite reputational or political costs. Fourth, it has emergent effects: the relationship produces outcomes that cannot be reduced to either actor’s isolated preferences. Fifth, it rests on a common project that supplies the friendship with continuity and political meaning.⁶

The framework must nevertheless be applied cautiously. Todd Hall emphasizes that diplomatic friendship is often performed: leaders publicly enact familiarity, loyalty, and solidarity because such performances serve domestic and international purposes. Performance, however, does not automatically make the relationship insincere. Political friendship may combine genuine affinity, habitual trust, institutional incentives, and strategic staging. The relevant analytical task is therefore not to prove private affection but to identify recurring, costly, and consequential manifestations of the five dimensions.⁷

5 Maéva C., Sangar E. 2018. Researching emotions in international relations: Methodological perspectives on the emotional turn. Cham, Switzerland: Palgrave Macmillan. 1–13., 3–4., 3–13., 53–54., 54–56., 54–59., 57–73.

Hutchison E., & Bleiker, R. 2014. Theorizing Emotions in World Politics. *International Theory*, 6(3), 491–514.

6 Van Hoef, Y. 2012. *The Friendship Factor: An Investigation into the Potential of Social Network Analysis and Game Theory to Assess the Influence of Friendship in Politics on Historical Actors*. Thesis, University of Groningen, Groningen.

Koschut S., & Oelsner, A. (Eds.) 2014. *Friendship and International Relations*. Basingstoke: Palgrave Macmillan.

7 Hall T. H. 2015. *Emotional Diplomacy: Official Emotion on the International Stage*. Ithaca: Cornell University Press. 2–3., 188–189.

The five components are analytically distinct but empirically interdependent. Recognition creates the status on which reciprocal exchange can rest; repeated reciprocity can generate expectations of loyalty; loyalty under pressure strengthens trust; and a common project translates the relationship into institutional and discursive effects. A single friendly statement is therefore insufficient. Political friendship is more plausibly identified when the dimensions recur over time and when the relationship helps explain choices that would otherwise appear unusually costly, consistent, or symbolically charged. This relational approach also avoids a false choice between emotion and rationality: leaders may become attached to a political partner precisely because the relationship repeatedly proves useful and identity-confirming.⁸

The analysis evaluates three rival explanations alongside political friendship. A conventional strategic account emphasizes Hungary's search for diplomatic relevance and Israel's need for supportive EU partners. A party-ideological account stresses the convergence of Fidesz and Likud around sovereignty, security, and opposition to liberal institutions. A performative account treats public warmth as strategic signalling rather than evidence of interpersonal attachment. The argument for political friendship becomes persuasive only where it adds explanatory value to these alternatives—for example, by clarifying the durability of support during controversy, the personalization of institutional decisions, or the willingness to accept costs on behalf of the partner.⁹

This study uses a qualitative case-study design. Its empirical material consists of official statements, bilateral meetings, foreign-policy decisions, party-level contacts, reporting on politically sensitive episodes, and relevant academic literature. The five dimensions function as analytical categories. Equality is assessed through mutual recognition and status attribution; reciprocity through exchanges of diplomatic support; moral obligation through support under conditions of cost or controversy; emergent effects through consequences

8 Van Hoef, Y. 2012. *The Friendship Factor: An Investigation into the Potential of Social Network Analysis and Game Theory to Assess the Influence of Friendship in Politics on Historical Actors*. Thesis, University of Groningen, Groningen.

Koschut S., & Oelsner, A. (Eds.) 2014. *Friendship and International Relations*. Basingstoke: Palgrave Macmillan.

9 Hall T. H. 2015. *Emotional Diplomacy: Official Emotion on the International Stage*. Ithaca: Cornell University Press. 2–3., 188–189.

for EU policy and transnational political networking; and the common project through shared narratives of sovereignty, migration, security, and civilizational identity. The method establishes a plausible interpersonal contribution to policy but does not claim that friendship is the sole cause of Hungarian or Israeli decisions.¹⁰

The temporal focus on 2010–2025 captures three phases. The first, from 2010 to the 2015 migration crisis, established ideological and diplomatic convergence. The second, from 2015 to 2019, institutionalized cooperation through the V4–Israel format, closer party relations, and the Jerusalem trade office. The third, from 2020 to April 2025, tested the relationship under sharper international polarization, culminating in the ICC-related Budapest visit. This periodization permits attention to continuity as well as exceptional episodes. Evidence is interpreted conservatively: public rhetoric is treated as an indicator of relationship construction, while greater weight is assigned to repeated policy behaviour and decisions involving identifiable costs.¹¹

3. From Strategic Convergence to Personalized Alliance

The post-2010 rapprochement developed on foundations that preceded the two leaders' mature political alliance. Hungary and Israel restored diplomatic relations in 1989, and bilateral ties expanded during the following two decades. Orbán's description of Likud as an ideological sister party during a 2005 visit already indicated an interest in closer party-political alignment. After 2010, however, relations acquired a new intensity. Israel was increasingly presented not only as a foreign-policy partner but also as a successful sovereign state defending its identity and security under sustained international pressure.¹²

10 Kaarbo J. 1997. Prime Minister Leadership Styles in Foreign Policy Decision-making: A Framework for Research. *Political Psychology* 18, no. 3. 553–581.

Giampiero G., Ferrari F., Amadori A. 2009. With Friends like These: Foreign Policy as Personal Relationship. *Contemporary Politics* 15, no. 2. 247–264

11 Tamir Wertzberg: A Netanjahu-látogatás egyértelmű üzenet: Orbán Viktor rendszere követendő példa. 03. 04. 2025 Available at: <https://www.kolisrael.hu/a-netanjahu-latogatas-egyertelmű-uzenet-orban-viktor-rendszere-kovetendo-pelda/> Downloaded at: 04. 10. 2025

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12 Hont András: Az izraeli kapcsolatot magyar segítséggel térhetett vissza Bibi, a természetes szövetség. 3. 11. 2022. Available at: <https://atlatzso.hu/vilagterkep/2022/11/03/>

The longer historical background underscores that this was not a linear continuation of bilateral relations. During the Cold War, Hungarian policy toward Israel was constrained by Soviet bloc strategy, and diplomatic relations were severed after the 1967 Arab–Israeli war. Their restoration in 1989 created the institutional basis for cooperation, but it did not predetermine the political intimacy of the post-2010 period. The contemporary alliance is therefore best understood as a qualitative shift: traditional diplomatic relations were overlaid by party affinity, leader-centred legitimation, and a shared interpretation of sovereignty. This historical contrast strengthens the case for examining how the personal relationship altered the use of already available bilateral institutions.¹³

The domestic and international projects of Fidesz and Likud supplied important points of convergence. Both parties emphasized executive leadership, national sovereignty, security, and scepticism toward liberal international institutions. The 2015 European migration crisis strengthened this alignment. Orbán used Israel as a reference point for border protection and state-centred security, while Netanyahu gained an EU partner willing to challenge or obstruct collective positions critical of Israel. These parallels should not be overstated—Hungary and Israel face different strategic environments—but they created a language through which the two governments could portray cooperation as value-based rather than merely transactional.¹⁴

Party relations reinforced this language. Contacts between Fidesz-linked actors and Likud representatives became more regular, while the Likud Hungary Association, established in 2018, offered an additional channel for ideological exchange and elite networking.

az-izraeli-kapcsolat-magyar-segitseggel-terhetett-vissza-bibi-a-termeszetes-szovetseges/ Downloaded at: 09. 04. 2025

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13 Seidner M. 2025. Az alija és a cionizmus Magyarországon: államépítési törekvések és geopolitikai konfliktusok a hidegháború árnyékában. *Külügyi Szemle*, 24(1). doi:10.47707/kulugyi_szemle.2025.1.2.

14 Müller P. Dyduch J., Gazsi D. 2025. Populism, Party-Cohesion, and the de-Europeanisation of National Foreign Policy Institutions in Hungary and Poland. *Cambridge Review of International Affairs*. 1–24. <https://doi.org/10.1080/09557571.2025.2476032>.

Peleg I. 2019. The Likud under Benjamin Netanyahu. *Israel Under Netanyahu*. 11–32. <https://doi.org/10.4324/9780429342349-2>.

Such organizations did not determine state policy, but they broadened the relationship beyond the foreign ministries and helped sustain it during changes in government or periods when Netanyahu was outside the premiership. The party dimension also connected bilateral relations to a wider transnational right in which Israel was valued as a security model and Hungary as an example of resistance to liberal European pressure.¹⁵

This convergence also contained tension. The Hungarian government's campaign against George Soros and its treatment of historical memory generated accusations that political messaging relied on antisemitic tropes. Several Jewish organizations and Israeli critics objected to Netanyahu's willingness to embrace Orbán. Netanyahu nevertheless largely avoided public confrontation with the Hungarian government. The controversy is analytically important because it distinguishes ordinary diplomatic convenience from a relationship in which political support is preserved despite normative and reputational costs.¹⁶

Four developments illustrate the institutional and strategic consolidation of the relationship. First, the 2017 V4–Israel summit in Budapest created an alternative regional platform through which Israel could engage Central European governments and Hungary could present itself as an intermediary between Israel and Europe. Second, Hungary repeatedly adopted Israel-friendly positions in EU and UN settings, including resistance to common statements critical of Israeli policy. Third, in 2019 Hungary opened a trade office with diplomatic status in Jerusalem, the first such move by an EU member state. Fourth, Netanyahu's official visit to Budapest in

15 Hont András: Az izraeli kapcsolat: magyar segítséggel térhetett vissza Bibi, a természetes szövetséges. 3. 11. 2022. Available at: <https://atlatszo.hu/vilagterkep/2022/11/03/az-izraeli-kapcsolat-magyar-segitseggel-terhetett-vissza-bibi-a-termeszetes-szovetseges/> Downloaded at: 09. 04. 2025

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16 William Echikson: Viktor Orbán's anti-Semitism problem. 13. 05. 2019. Available at: <https://www.politico.eu/article/viktor-orban-anti-semitism-problem-hungary-jews/> Downloaded at: 10. 04. 2025

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April 2025, despite the International Criminal Court warrant issued in November 2024, coincided with Hungary's announcement that it would withdraw from the Court. Together these steps demonstrate the movement from rhetorical convergence to policy-backed alliance.¹⁷

The sequence is important. The 2017 summit gave the relationship a regional framework and publicly associated Netanyahu with Central European governments critical of Brussels. The Jerusalem office then converted political sympathy into a diplomatic innovation with implications for the contested status of the city. Hungary's conduct in EU forums supplied recurring, less visible evidence that support was not confined to ceremonial visits. Finally, the 2025 episode placed the relationship in direct tension with an international legal institution. Each step increased the cost and institutional depth of alignment, suggesting cumulative commitment rather than a collection of unrelated gestures.¹⁸

The 2025 visit was especially revealing. For Netanyahu, full official hospitality in an EU capital challenged the image of international isolation. For Orbán, the visit dramatized Hungary's diplomatic autonomy and its willingness to contest institutions presented as politically biased or illegitimate. The timing of the withdrawal announcement transformed an already symbolic meeting into a costly act of alignment and provided the strongest contemporary test of whether loyalty extended beyond routine cooperation.¹⁹

17 Müller P. Dyduch J., Gazsi D. 2025. Populism, Party-Cohesion, and the de-Europeanisation of National Foreign Policy Institutions in Hungary and Poland. *Cambridge Review of International Affairs*. 1–24. <https://doi.org/10.1080/09557571.2025.2476032>.

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18 <https://www.israelhayom.com/2021/03/11/hungary-is-leading-the-change-in-eu-stance-on-jerusalem/> (Downloaded at: 30. 11. 2024)

<https://www.timesofisrael.com/in-first-for-eu-state-hungary-open-diplomatic-trade-office-in-jerusalem/> (Downloaded at: 30. 11. 2024)

19 MTI: Israeli Prime Minister Benjamin Netanyahu to pay an official visit to Hungary. 31. 03. 2025 Available at: <https://miniszterelnok.hu/en/israeli-prime-minister-benjamin-netanyahu-to-pay-an-official-visit-to-hungary/> Downloaded at: 10. 04. 2025

Justin Spike: Hungary welcomes Netanyahu and says it will leave the International Criminal Court. 04. 04. 2025 Available at: <https://apnews.com/article/netanyahu-visits-hungary-despite-international-arrest-warrant-d3ce4f986adbff6c324b8ef86261731e> Downloaded at: 10. 04. 2025

4. The Orbán–Netanyahu Relationship through Five Dimensions

4.1 *Equality and Respect*

Materially, Hungary and Israel are not equal in military capability, strategic exposure, or relations with the United States. Political friendship, however, depends on perceived relational equality rather than objective parity. Orbán and Netanyahu repeatedly construct one another as autonomous leaders of strategically important states. Orbán describes Israel as a key partner and a model of sovereign self-defence; Netanyahu has praised Hungary as a significant European actor capable of influencing wider policy toward Israel. Such statements exceed ceremonial politeness because they assign each leader a role in the other's political narrative.²⁰

The language of respect is reinforced by a shared self-image. Both present themselves as leaders who protect the nation against external pressure and who reject political instruction from supranational institutions. Mutual recognition therefore operates at two levels: each validates the other's international relevance, and each confirms the legitimacy of a contested domestic political model. This symbolic equality helps compensate for asymmetries between the two states and creates the interpersonal basis for reciprocal action.²¹

Respect is also conveyed through access and political attention. High-level visits, joint press appearances, and Netanyahu's repeated use of the language of friendship elevate Orbán above the status normally associated with the leader of a medium-sized Central European state. Conversely, Orbán's depiction of Israel as a strategic and civilizational reference point elevates Netanyahu's domestic political project into a model relevant to Europe. These acts of status attribution are consequential because both leaders face criticism that

20 Ilan Ben Zion: Netanyahu greets Hungary's Orban as 'true friend of Israel'. 19. 07. 2018 Available at: <https://apnews.com/article/938bb193c0894691bf42a6457d1fae4c> Downloaded at: 10. 04. 2025

21 Aron H., Holland E. 2024. Illiberal Leaders in the International Arena: The Cases of Hungary and Israel. *Journal of Illiberalism Studies* 4, no. 2. 59–77. <https://doi.org/10.53483/xcpw3576>.

Halmai G. 2024. Illiberal Constitutionalization and Scholarly Resistance: The Cases of Israel and Hungary. *Journal of Illiberalism Studies* 4, no. 1. 33–43. <https://doi.org/10.53483/xcou3566>.

seeks to marginalize them internationally; mutual recognition helps each reject that marginalization.²²

4.2 *Reciprocity*

Reciprocity is the clearest empirical component of the relationship. Hungary supplies Israel with political support in settings where a single EU member state can delay, dilute, or block collective positions. It has also taken symbolic steps—most notably the Jerusalem office—that demonstrate a willingness to depart from prevailing European caution. Netanyahu, in return, has publicly praised Hungary, treated Orbán as a trusted partner, and provided political legitimization at moments when the Hungarian government faced criticism from European institutions and parts of the Jewish diaspora.²³

The benefits are not identical, but reciprocity does not require symmetrical exchanges. Israel receives diplomatic room for manoeuvre and access to a supportive voice inside the EU. Orbán receives recognition from the leader of a state central to security debates and Jewish history, as well as validation for the claim that Hungary is a serious international actor rather than an isolated rule-breaker. Each leader thus supplies a resource valuable to the other: institutional support on the Hungarian side and political legitimacy on the Israeli side.²⁴

The exchange is nevertheless unequal in form and should not be romanticized. Hungary's EU membership gives it a specific institutional asset, while Israel's contribution is more often symbolic, political, and network-based. Some Hungarian decisions would also be compatible with ideological preference even without personal friendship. Reciprocity is therefore demonstrated not by a precise balance sheet but by the regular expectation that assistance will be acknowledged and answered. Over time, this expectation differentiates the relationship from episodic issue-based coordination and encourages both governments to anticipate the partner's political needs.

22 Ilan Ben Zion: Netanyahu greets Hungary's Orbán as 'true friend of Israel'. 19. 07. 2018 Available at: <https://apnews.com/article/938bb193c0894691bf42a6457d1fae4c> Downloaded at: 10. 04. 2025

23 <https://www.israelhayom.com/2021/03/11/hungary-is-leading-the-change-in-eu-stance-on-jerusalem/> (Downloaded at: 30. 11. 2024)

<https://www.timesofisrael.com/in-first-for-eu-state-hungary-open-diplomatic-trade-office-in-jerusalem/> (Downloaded at: 30. 11. 2024)

24 Aron H., Holland E. 2024. Illiberal Leaders in the International Arena: The Cases of Hungary and Israel. *Journal of Illiberalism Studies* 4, no. 2. 59–77. <https://doi.org/10.53483/xcpw3576>.

4.3 Moral Obligation and Loyalty

Loyalty becomes visible when support is maintained under adverse conditions. Netanyahu's relationship with Orbán survived controversies over the Soros campaign, historical memory, and accusations of antisemitism. Public distance would have reduced criticism within Israel and parts of the diaspora, yet Netanyahu continued to emphasize strategic partnership. This does not prove private affection, but it indicates that the relationship had acquired a value and durability not captured by short-term reputational calculation alone.²⁵

Orbán's support for Netanyahu has been even more institutionally visible. Hungary defended Israel in multilateral diplomacy, emphasized Israel's right to security, and hosted Netanyahu after the ICC warrant. The decision to announce withdrawal from the Court during the 2025 visit involved legal, diplomatic, and reputational costs and therefore constitutes stronger evidence of loyalty than routine statements of friendship. Strategic motives remained present: the step also served Orbán's wider campaign against supranational legal authority. Yet this overlap strengthens rather than weakens the hybrid interpretation. Loyalty became politically sustainable precisely because it advanced both the relationship and the Hungarian government's broader ideological agenda.²⁶

The distinction between loyalty and unconditional support remains essential. Neither leader has subordinated all interests to the other, and the relationship has not been tested by a direct clash over a core national objective. The evidence instead supports bounded loyalty: within a broad zone of compatible interests, the actors grant one another exceptional political consideration and defend the relationship against pressures that might otherwise produce distance. This is sufficient for political friendship as an analytical category, provided it is not confused with altruism or private intimacy.²⁷

25 William Echikson: Viktor Orbán's anti-Semitism problem. 13. 05. 2019. Available at: <https://www.politico.eu/article/viktor-orban-anti-semitism-problem-hungary-jews/> Downloaded at: 10. 04. 2025

Subotic J. 2021. Antisemitism in the Global Populist International. *The British Journal of Politics and International Relations* 24, no. 3. 458–474. <https://doi.org/10.1177/13691481211066970>.

26 Justin Spike: Hungary welcomes Netanyahu and says it will leave the International Criminal Court. 04. 04. 2025 Available at: <https://apnews.com/article/netanyahu-visits-hungary-despite-international-arrest-warrant-d3ce4f986adbff6c324b8ef86261731e> Downloaded at: 10. 04. 2025

27 Van Hoef, Y. 2012. *The Friendship Factor: An Investigation into the Potential of Social*

4.4 Emergent Effects

The relationship has generated consequences beyond bilateral cooperation. Hungary's willingness to resist EU consensus has contributed to the fragmentation of European policy toward Israel. A leader-level relationship is not the only cause of this divergence—domestic politics, ideology, and institutional bargaining are also central—but personal trust lowers the political cost of repeated alignment and gives bilateral commitments greater consistency. The friendship therefore acts as an intervening mechanism connecting ideological preference to concrete multilateral behaviour.²⁸

This mechanism is particularly relevant in the EU's consensus-oriented foreign policy. Hungary does not need to transform the preferences of all member states to affect outcomes; the credible possibility of objection can delay statements, alter wording, or signal that a unified European position is unattainable. A close leader relationship can make such resistance more predictable and politically salient. Israel benefits not only from a favourable Hungarian vote but from the knowledge that a partner is prepared to contest the framing of the issue before consensus forms. The interpersonal relationship thus amplifies the leverage provided by institutional rules.²⁹

A second emergent effect is network formation. The 2017 V4–Israel summit, closer Fidesz–Likud contacts, and the creation of the Likud Hungary Association embedded the bilateral relationship in a wider network of sovereigntist actors. Through these channels,

Network Analysis and Game Theory to Assess the Influence of Friendship in Politics on Historical Actors. Thesis, University of Groningen, Groningen.

Koschut S., & Oelsner, A. (Eds.) 2014. *Friendship and International Relations*. Basingstoke: Palgrave Macmillan.

- 28 Aggestam L., Bicchi F. 2019. New Directions in EU Foreign Policy Governance: Cross-loading, Leadership and Informal Groupings. *JCMS: Journal of Common Market Studies* 57, no. 3. 515–532. <https://doi.org/10.1111/jcms.12846>.

Seidner M. 2022. A V4-ek gazdasági és politikai kapcsolata Izraellel – szavazati magatartás az ENSZ Közgyűlésben a V4-ek és Izrael viszonyrendszerében. *Európai Tükör XXV. évfolyam 1-2. szám Nemzeti Közszerológati Egyetem Ludovika Egyetemi Kiadó* DOI: 10.32559/et.2022.1-2.6

- 29 Aggestam L., Bicchi F. 2019. New Directions in EU Foreign Policy Governance: Cross-loading, Leadership and Informal Groupings. *JCMS: Journal of Common Market Studies* 57, no. 3. 515–532. <https://doi.org/10.1111/jcms.12846>.

Seidner M. 2022. A V4-ek gazdasági és politikai kapcsolata Izraellel – szavazati magatartás az ENSZ Közgyűlésben a V4-ek és Izrael viszonyrendszerében. *Európai Tükör XXV. évfolyam 1–2. szám Nemzeti Közszerológati Egyetem Ludovika Egyetemi Kiadó* DOI: 10.32559/et.2022.1-2.6

political narratives and campaign themes circulate alongside diplomatic support. The Orbán–Netanyahu relationship thus became more than an exchange between two governments: it helped normalize cooperation among leaders who portray liberal international institutions as constraints on democratic sovereignty.³⁰

A third effect is the transfer and reinforcement of political language. Security, migration, national survival, and external interference appear in both leaders' narratives, although in distinct historical contexts. Israel functions in Hungarian discourse as evidence that robust borders and state-centred security are legitimate, while Hungary offers Israel an example of how support can be mobilized through civilizational and sovereignty-based framing inside Europe. The relationship does not create these narratives, but it increases their international resonance.³¹

4.5 A Common Political Project

The relationship's strongest source of cohesion is a common political project centred on sovereignty. Orbán and Netanyahu both frame the nation-state as the primary source of democratic legitimacy and security, and both depict external institutions, transnational elites, or hostile international opinion as potential constraints on national self-determination. Migration and border control add a security dimension, while the defence of 'Judeo-Christian civilization' connects national policies to a broader civilizational narrative.³²

30 Hont András: Az izraeli kapcsolat: magyar segítséggel térhetett vissza Bibi, a természetes szövetséges. 3. 11. 2022. Available at: <https://atlaszso.hu/vilagterkep/2022/11/03/az-izraeli-kapcsolat-magyar-segitseggel-terhetett-vissza-bibi-a-termeszetes-szovetseges/> Downloaded at: 09. 04. 2025

Szombat Folyóirat: Fidesz politikus: aktív szövetségépítés zajlik a magyar és az izraeli jobboldal között. 07. 11. 2022 Available at: <https://www.szombat.org/hirek-lapszemle/fidesz-politikus-aktiv-szovetsegepites-zajlik-a-magyar-es-az-izraeli-jobboldal-kozott> Downloaded at: 10. 04. 2025

31 Rosenfeld G. D. 2021. The Rise of Illiberal Memory. *Memory Studies* 16, no. 4. 819–836. <https://doi.org/10.1177/1750698020988771>.

Kopper Á., Körtvélyesi Zs., Majtényi B., Szalai A. 2020. The 'Insecurity Toolbox' of the Illiberal Regime: Rule by Law and Rule by Exclusion. *Political Anthropological Research on International Social Sciences* 1, no. 2. 216–242. <https://doi.org/10.1163/25903276-bja10012>.

32 Tjalve V. S. 2021. Judeo-Christian Democracy and the Transatlantic Right: Travels of a Contested Civilizational Imaginary. *New Perspectives* 29, no. 4. 332–348. <https://doi.org/10.1177/2336825x211052979>.

This common project should not be interpreted as complete ideological identity. Israeli security policy arises from a regional conflict environment and existential threat perceptions that differ fundamentally from Hungary's position inside the EU and NATO. Nor are the two leaders' domestic coalitions or religious narratives identical. What they share is a political grammar: strong leadership, national autonomy, scepticism toward universalist legal claims, and the presentation of security as a precondition of political community. This grammar allows strategic cooperation to be represented as moral solidarity.³³

The project also serves domestic legitimization. Orbán can cite Israel to argue that strict border control, national preference, and security-centred governance are compatible with democracy and Western identity. Netanyahu can point to Hungary as evidence that significant European actors reject what he presents as biased international treatment of Israel. In both cases, the foreign partner becomes part of a domestic narrative about political courage and resistance to external coercion. This mutual use of the relationship does not reduce it to propaganda; it helps explain why the friendship is repeatedly performed in public and why symbolic gestures carry policy value.³⁴

The common project also explains the relationship's resilience. Individual policy exchanges may change with electoral circumstances, but the broader worldview gives each new act of cooperation an established interpretive frame. Hungary's EU positions, the Jerusalem office, and the ICC decision can all be presented as parts of the same struggle for sovereign decision-making. Political friendship thereby links personal trust to institutional behaviour and converts a bilateral alliance into a durable symbolic partnership.³⁵

33 Aron H., Holland E. 2024. Illiberal Leaders in the International Arena: The Cases of Hungary and Israel. *Journal of Illiberalism Studies* 4, no. 2. 59–77. <https://doi.org/10.53483/xcpw3576>.

Halmi G. 2024. Illiberal Constitutionalization and Scholarly Resistance: The Cases of Israel and Hungary. *Journal of Illiberalism Studies* 4, no. 1. 33–43. <https://doi.org/10.53483/xcou3566>.

34 Hall T. H. 2015. *Emotional Diplomacy: Official Emotion on the International Stage*. Ithaca: Cornell University Press. 2–3., 188–189.

35 Kopper Á., Körtvélyesi Zs., Majtényi B., Szalai A. 2020. The 'Insecurity Toolbox' of the Illiberal Regime: Rule by Law and Rule by Exclusion. *Political Anthropological Research on International Social Sciences* 1, no. 2. 216–242. <https://doi.org/10.1163/25903276-bja10012>.

Rosenfeld G. D. 2021. The Rise of Illiberal Memory. *Memory Studies* 16, no. 4. 819–836. <https://doi.org/10.1177/1750698020988771>.

5. Conclusions

The Orbán–Netanyahu relationship meets the principal observable criteria of political friendship, but only in a hybrid form. The leaders construct one another as respected and politically significant partners; their governments exchange valuable but different forms of support; loyalty persists during controversy and, in the 2025 ICC episode, entails demonstrable cost; the relationship shapes EU politics and sovereigntist networking; and cooperation is sustained by a common project organized around sovereignty, security, and civilizational identity. These findings show why a purely structural account is incomplete.³⁶

At the same time, the evidence does not justify treating the relationship as detached from interest. Hungary's support increases its bargaining visibility and reinforces Orbán's challenge to liberal international institutions. Israel gains an advocate inside the EU and a partner willing to undertake symbolic diplomatic initiatives. Public performances of friendship help both leaders communicate strength and international relevance. Political friendship and strategic calculation are therefore mutually constitutive rather than mutually exclusive.³⁷

The study also demonstrates the broader analytical value of interpersonal approaches. Leader relationships can stabilize policy choices, amplify ideological convergence, and create effects in institutions that formally operate at the state level. In the Hungarian–Israeli case, personal alignment helped transform bilateral cooperation into an ideologically integrated alliance with consequences for European foreign-policy cohesion. The relationship's long-term durability will depend on whether the networks and practices created around the two leaders can survive changes in leadership. That question provides a clear test for distinguishing a deeply institutionalized partnership from one whose exceptional intensity remains dependent on Orbán and Netanyahu themselves.

36 Van Hoef, Y. 2012. *The Friendship Factor: An Investigation into the Potential of Social Network Analysis and Game Theory to Assess the Influence of Friendship in Politics on Historical Actors*. Thesis, University of Groningen, Groningen.

Koschut S., & Oelsner, A. (Eds.) 2014. *Friendship and International Relations*. Basingstoke: Palgrave Macmillan.

37 Hall T. H. 2015. *Emotional Diplomacy: Official Emotion on the International Stage*. Ithaca: Cornell University Press. 2–3., 188–189.

The theoretical implication is that political friendship should be understood as a mechanism of foreign-policy consolidation rather than as a sentimental exception to rational politics. In this case, personal recognition and loyalty increased the coherence of a pre-existing strategic and ideological alignment. Friendship did not generate Hungarian support for Israel from nothing, but it made that support more reliable, visible, and resistant to external criticism. The concept is therefore most useful when applied alongside, not instead of, structural and domestic explanations.³⁸

The analysis has limitations. It relies on public actions and discourse and cannot establish the private emotional states of either leader. It also cannot isolate political friendship from party ideology, domestic political incentives, or geopolitical interests. Its more modest claim is that the interpersonal relationship is a necessary part of the explanation: it helps account for the consistency, symbolism, and willingness to incur costs that characterize Hungarian–Israeli relations after 2010.

38 Van Hoef, Y. 2012. *The Friendship Factor: An Investigation into the Potential of Social Network Analysis and Game Theory to Assess the Influence of Friendship in Politics on Historical Actors*. Thesis, University of Groningen, Groningen.

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<https://www.timesofisrael.com/in-first-for-eu-state-hungary-open-diplomatic-trade-office-in-jerusalem/> (Downloaded at: 30. 11. 2024)

BOOK REVIEW

Máté Szabó

**Zsolt Czigányik – Iva Dimovska (ed.) 2025.
Utopia and Democracy.
Theories, Practices, Fictions**

Palgrave Macmillan. Palgrave Studies on Utopianism. London.
ISBN 978-3-031-89912-6. 239.p.

In political philosophy and history of political ideas the connection of utopia and democracy is not a very frequent relation. The wide range of topics of democratic theory as values, institutions, practices, cultures, leadership etc. has certain mainstream issues and their usual combinations. Utopias as fictions are rarely involved and if yes than mainly following Karl Mannheim related to ideologies, experiences of realizations by social and political movements, community networks or at the 20th century by totalitarian political parties. In the search of utopic models and experiences critical concepts of the existing sociopolitical structures and experiments to correct or replace are articulated, which is worth of the interest of the social sciences. As the editors, Czigányik/Dimovska state „utopianism is an interdisciplinary concept which cover philosophy, sociology, literature, history of ideas, art and architecture, religion, futurology and other fields” ... ”is also present in many trends in contemporary popular movements, and in phenomena as diverse as films, video games, environmental and medical projections.” (II.)

The editors are both connected to the project of Democracy Institute of Central European University Budapest “Democracy in East Central European Utopianism” (2022–2025) sponsored by the Gerda Henkel Foundation. The volume is the result of their workshop “Utopia and Democracy” in April 2023. The special focus of the research and the volume is the difference between Western and Eastern Europe, and the main thesis is, that in Western Europe there exist a much wider and organic relation between utopias and the democratic theory than in Eastern Europe, where democratization processes were late undercurrents to authoritarian and elite oriented

systems. This thesis is well documented and argued by the chapters of the whole volume. Especially in case of the mainstream literature rather unknown traditions of utopianism, as of Hungary (Czigányik 159–177.), Yugoslavia (Dimovska 177–199.), Russia (Koryagina 199–213.), and the Ukraine (Bekhta 213–231.). Most of the referred material of the East European tradition may be brand new for Western readers, as well as the comparative work on the relations and differences among these regional patterns.

The editors and authors are integrating as well as the mainstream of literature, the dystopia, or “negative utopia” within the discussion on utopia. These dystopic models are flourishing in both regions of Europe. However, in this category, we have to accept the avantgarde and pioneering role of certain Western authors as Aldous Huxley and George Orwell, who had many followers both in the East and the West. Both editors are rejecting the views of Karl Popper and Tamás Molnár on the necessary authoritarian character of utopias and dystopias as well (X.), because they are ignoring their differences related to democratic values.

The introduction of the volume gives an overview of the conceptual pillars of ordering the utopic material according “contexts, projects, communities” (XV.) on an original way. Relationships of “ideology and utopia” (Mannheim) are interpreted by the authors both in the liberal-democratic as well as in the conservative-authoritarian tradition, and in Eastern Europe they are also related to the Marxism and the Socialism for whom the “Utopia” of Thomas More’s from 1516 gave a “spark to the latter explosion” of the social conflicts of industrial societies as Karl Marx and other Socialist thinkers stated. The importance of the Liberal values as “Rule of Law” (Hans Kelsen) or “Distributive Justice” (John Rawls) are in Western Europe elements of the general political culture of the modernity and post-modernity, meanwhile in Eastern Europe far away goals in the radical Liberal utopias before 1989, and also hardly incorporated into the new political systems with lasting traditions of authoritarian political cultures.

The last chapter by Natalya Bekhta on the contemporary Ukraine-Russia conflict (213–229.) and the first chapter of Gregory Claeys (3–19.) touching the global ecological problems show the organic relation of the utopian thought to the present day global challenges of the 21th century, and the differences between issues of post-materialism (Ronald Inglehart) in the Western countries,

and primer security issues with material value character by the Eastern ones.

Also very remarkable from the theoretical and methodological point of view the chapter written by Luise Passerini "Utopian versus Utopian: the Ambivalence of Utopia and the Oxymoron of Utopic Democracy" (19–35.), which is a real masterpiece deserving my highest respect. The author starts with the analysis of the everyday Italian phrasing and different meanings of "Utopia" and "Utopic", and conclude in three ideal types of the last generations as follows; "the 1960's or 'long-68' utopia; second the feminist utopia; and third the Europeanist utopia" (25.). Remembering the thesis of the German philosopher Ernst Bloch-referred to by Dimovska (179.) – on "concrete utopias", meaning that not universal utopian messages for the whole mankind-as Marxism-but specific trajectories of special audiences are developing in the "post-Auschwitz" (Bloch) era as "special and particular utopias" (Bloch). Passerini identified three types of these, as leading "Weltanschauung", "Zeitdiagnose" of specific age groups, generations, gender groupings, regional networks.

Various political philosophy analyses give in the volume a fascinating round trip in the "heaven of political philosophy in different galaxies" by analyses es follows; "realist political theory" (Szűcs-Zágoni, 35–55.); "final normative theory" (Huoranszki 55–73.); "Aristotle on citizenship" (Bartels 75–91.) "Uchronia as the Foundation of Utopia" (Balázs 91–115); "an American Conservative Utopia: Russel Kirk" (Pintér 115–141.).

Editor of the volume, Zsolt Czigányik in his chapter gave an insight in the 18–19th century highlights of Hungarian utopian literature, analysing the works of György Bessenyei (1747–1811) and of Imre Madách (1823–1864). In the works of the two authors, he found that "democratic ideals appear with criticism, frequently depicting a benevolent and formidable leader as the preferred alternative to the rule of the masses." (163.) / This patterns seems to be survive until today as Hungary become within the EU a forerunner of the de-democratization widely criticized as non-democracy, led by a charismatic authoritarian leader between 2010 by right now... – remark of Máté Szabó. / Czigányik published earlier a comprehensive study of Hungarian utopian literature; "Utopia Between East and West in Hungarian Literature". London. Palgrave MacMillan. 2023.

The introduction of the chapter of Czigányik on Hungary returns to the discussion of the general theoretical and methodological

issues of the volume, to the interrelation of utopianism and democracy. In his short (160–163.) discussion the following thesis is formulated, using the results of another CEU research group on modern political thought of East Central Europe “when interpreting Hungarian utopian literature is what may be called the regular import of Western ideas into Central European political and social thought... such import means that ‘paradigms originating in Western European contexts had to be ‘negotiated’ in a setting marked by radically different local conditions”. (163.) (Trencsényi et. al. *Negotiating Modernity*. Oxford University Press. 2016.: 2.)

Czigányik formulated a thesis on the general differences of specific types of utopian literature and of social science oriented utopias which characterize the whole material of the analyses in this collective volume and worth to close this review with, as an important contribution to the discourse on democracy and utopia. “The logic of a literary narrative demands the presence of characters and conflicts, whereas social sciences naturally focus on political structures, which are more difficult to present in a work of literature. This dilemma exemplifies the fact that the genre of utopia occupies a space between fictive literature and the social sciences overlapping with both, but not necessarily fulfilling the requirements of either thoroughly.” (172.)

ABSTRACT

Corrado Cassani: Between General Sociology and the Sociology of Law

This essay systematically reconstructs the theoretical and methodological framework of Robert King Merton's work through eleven lectures, moving from the more strictly theoretical categories (deviance, fruitful and sterile ignorance, the relationship between knowledge and opinion, the notion of a paradigm) towards the historical-epistemological ones (sociology of science, medium-range theory, anomie and white-collar crime, serendipity, a comparison between the European and North American traditions, and the relationship between falsificationism and historical cumulativism). Proceeding from a discipline-by-discipline comparison with Durkheim, Sorokin, Luhmann, Lazarsfeld, Parsons and Berger, the analysis argues that Merton's intellectual stature does not stem from pre-eminence in any single field, but from his rare ability to bring together, at a high level, the theoretical, methodological, empirical, popularising and epistemological functions of sociological work. Based on primary and secondary sources in several languages published from 1949 to the present day, this work is neither an intellectual biography nor an introductory textbook, but a reasoned reconstruction that aims to restore the *unitas multiplex* of 'Mr Sociology' and his continuing relevance to general sociology and to the sociology of science and knowledge.

Keywords: Robert K. Merton; sociology of law; middle-range theory; anomie and deviance; serendipity; self-fulfilling prophecy.

Tiziano Censi: Beyond data fetishism: Rethinking Datafication and Digital Platforms

This article introduces the category of data fetishism as a critical tool for rethinking the relationship between data, digital platforms, and contemporary capitalism. Drawing on a heuristic analogy with Marx's notion of commodity fetishism, it argues that a significant part of the debate on big data tends to assign excessive centrality to data, treating them as if they possessed autonomous value and explanatory power. This tendency may obscure, often even involuntarily, social relations and the wider productive and distributive

arrangements in which data are generated, collected, processed, and valorized. Through a critical discussion of Shoshana Zuboff's theory of surveillance capitalism and Christian Fuchs's account of unpaid digital labor, the article examines two influential interpretations that have decisively shaped the debate on platform power, while also revealing the limits of a data-centred reading of capitalist transformation. The main argument is therefore that data should be understood as social products embedded in global value chains, logistical systems, market infrastructures, and processes of circulation. From this perspective, digital platforms emerge as organizational and informational infrastructures that coordinate contemporary capitalism by connecting users, commodities, markets, labor processes, and distribution networks. The article therefore offers an epistemological contribution to platform studies and critical data studies by proposing a framework that reconnects datafication to the wider restructuring of capitalist society.

Keywords: Datafication; Platform Capitalism; Digital Platforms; Fetishism; Social Theory; Social Relations.

Alessia D'Andrea and Arianna D'Ulizia: Understanding Adolescent Engagement in Theatre through Reflexive Thematic Analysis within a Participatory Research–Design–Evaluation Framework

Youth involvement in theatre is mostly addressed through the lenses of access and motivation without considering the governance factors affecting engagement. This paper analyzes how the agency of adolescents is produced in a transnational theatre context through a Collaborative Change Research, Evaluation, and Design framework. Utilizing qualitative and participatory methods of research, the study uses reflexive thematic analysis of multi-site data obtained from adolescents and adult stakeholders. Five dimensions that affect engagement have been identified: ownership, accessibility and structural impediments, informality vs. institutionalization, intergenerational intermediation, and language and cultural capital. It was found that participation does not necessarily mean empowerment but is negotiated within relational, structural, and symbolic factors existing within institutional settings. This paper makes a contribution to youth studies and cultural policy through its focus on participation as a governance issue and the recognition of the necessity of co-agency, inclusiveness, and symbolic redistribution to foster youth involvement.

Keywords: Adolescent engagement, Reflexive Thematic Analysis, cultural policy, Participatory governance, Participatory research, Participatory design, Participatory evaluation.

Adele Bianco and Luca Santonetti: Lifelong Learning as a Structural Condition and Geopolitical Resource in the AI Era

The paper argues that lifelong learning (LLL) takes on strategic importance in light of the rapid technological innovation we are experiencing and, in particular, the spread of AI. These transformations represent a challenge, particularly for Western knowledge-intensive economies. Indeed, they are facing a social context characterised by an ageing workforce and a reshaping of global geopolitical balances. The paper's theoretical approach integrates endogenous growth theory (Romer, Lucas) with the contributions of Strange and Moision on the geopolitics of knowledge, recognising LLL as a strategic resource. Indeed, upskilling strategies are no longer viewed merely as an active labour market policy but as a structural condition for economic development and a lever of geopolitical power. Countries that underestimate this approach and fail to invest in the training of their senior workers or those with many years of work experience risk remaining on the global stage on the margins of the global market, both in economic-productive terms and in terms of political relevance. From a methodological perspective, the analysis is based on institutional reports (WEF, HAI AI Index 2025, OECD/AES) and sociological literature. These reveal that the competition for cognitive supremacy pits the US and China against each other, with Europe facing a skills gap.

Key words: Lifelong Learning; Artificial Intelligence; Geopolitics of Knowledge; Older Workers; Human Capital.

Lana Oseledtseva and Danilo Lorenzo Delos Santos: Analysis of the ASEAN and Ukraine's Political Dialogue within the Framework of Russia's Large-Scale Invasion

Ukraine is facing certain obstacles that require a new strategic approach beyond its usual partners and networks. It quite changes the perspective on cooperation with the Association of Southeast Asian Nations (ASEAN); therefore, it creates a modern geopolitical axis.

ASEAN and Ukraine began establishing diplomatic ties in 2013, when the first Ambassador from Ukraine to ASEAN was accredited. Ultimately, the Ministry of Foreign Affairs of Ukraine prioritized Asia over the European Union in its foreign policy in the 2020s in line with its economic policy. The move was vital for Ukraine, given the EU's slow response. As a reaction, “Asian Week” was launched as a “soft power” initiative, which was the start of a strategy being implemented on the world stage. This indicated that cooperation between the major states, such as China, was a positive sign. This research paper seeks to answer the question of what the future advantages are for Ukraine and ASEAN through the Treaty of Amity and Cooperation (TAC). Using Liberal Institutionalism as the primary lens of inquiry, it will contribute to existing literature by offering a case study of strategic partnership beyond regional ties and among non-traditional alliances such as the West or the European Union (EU).

Keywords: Treaty of Amity and Cooperation (TAC), ASEAN, Sectoral Dialogue Partnership, regional strategy, cooperation.

Márton Seidner: Beyond Strategic Cooperation: Political Friendship and the Orbán–Netanyahu Relationship in Hungarian–Israeli Relations after 2010

The study also demonstrates the broader analytical value of interpersonal approaches. Leader relationships can stabilize policy choices, amplify ideological convergence, and create effects in institutions that formally operate at the state level. In the Hungarian–Israeli case, personal alignment helped transform bilateral cooperation into an ideologically integrated alliance with consequences for European foreign-policy cohesion. The relationship’s long-term durability will depend on whether the networks and practices created around the two leaders can survive changes in leadership. That question provides a clear test for distinguishing a deeply institutionalized partnership from one whose exceptional intensity remains dependent on Orbán and Netanyahu themselves. Friendship did not generate Hungarian support for Israel from nothing, but it made that support more reliable, visible, and resistant to external criticism. The concept is therefore most useful when applied alongside, not instead of, structural and domestic explanations.

Keywords: Bilateral cooperation, Hungarian–Israeli relation, leader relationships, structural and domestic explanations.

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CENTRAL EUROPEAN POLITICAL SCIENCE REVIEW

Political Science Quarterly of the Central European Political Science Alliance

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