

# Hemispheres

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## Oman in Western Orientalist Scholarship: Sources, Approaches, and Historiographical Transformations

### Abstract

This study examines how Oman has been represented in Western scholarship across a wide range of sources, including political reports, travel narratives, translations, academic studies, and artistic productions. It traces European and American engagement with Oman from the medieval period to the present, demonstrating how commercial networks, imperial interests, and evolving scholarly practices shaped these representations. The article highlights contributions by British, French, German, Italian, Russian, and American scholars working across diverse fields, including history, philology, Ibadi theology, archaeology, and anthropology. In doing so, it charts the gradual transition from colonial-era modes of description toward more critical and academically grounded approaches, while also acknowledging the enduring influence of Orientalist scholarship on both Western interpretations of Oman and Omani historiography itself.

**Keywords:** Orientalism, Oman, Omani studies, Omani literature.

### Introduction: Orientalism and the Study of Oman

This paper provides a comprehensive overview of how Oman has been represented by Western scholars and Orientalists, whose works span a wide range of genres, including political reports, travel narratives and memoirs, translations, academic studies, journalism, and artistic depictions such as paintings and portraits. The topic has received limited systematic attention in scholarly literature.

While Edward Said's critique of Orientalism remains an essential reference point for understanding the relationship between knowledge production and imperial power, this article does not adopt his framework as a singular or overarching interpretive model. Said's analysis is primarily focused on the Eastern Mediterranean and the Arab Mashriq, and does not fully capture the diversity, chronology, and regional specificity of Western scholarly engagements with Oman. Instead, the study adopts a multi-layered scholarly approach that moves beyond rigid East-West binaries and avoids treating the "Near East" or "Middle East" as homogeneous analytical categories. Oman is approached as a historical and cultural space located at the intersection of

Arab, Islamic, Mediterranean, and Western Indian Ocean worlds – a liminal position that shaped Western writings in ways not adequately explained by classical Orientalist paradigms alone.

Within this framework, the term “Orientalist” is used in a contextual and pragmatic sense rather than as a strictly ideological label. It refers to scholars and writers who engaged with Oman under markedly different temporal, methodological, and institutional conditions, including figures operating prior to the formal consolidation of Orientalism as a discipline, as well as those whose work transcended or challenged its epistemological assumptions. By foregrounding this plurality of perspectives, the paper emphasises the heterogeneity of Western representations of Oman, ranging from early travel accounts and colonial administrative texts to modern linguistic, historical, and transregional studies. This diversity underscores the need to move beyond monolithic or Eurocentric models of knowledge production when assessing the evolution of Western perceptions of Oman.

Analyses of Western literature on Oman have often been narrow in scope, focusing primarily on specific national traditions or particular literary genres (Al-Hajri, 2006, 2011), or appearing only as peripheral components within broader surveys of the Arab world (Peterson, 1991). A notable exception is Hamilton’s *An Arabian Utopia: The Western Discovery of Oman* (2010); however, this work is confined to sources prior to 1970 and does not examine contemporary contexts or engage critically with the materials. In light of these limitations, a comprehensive study of how Western perceptions of Oman have evolved over time is both timely and necessary.

In addressing this gap, the present study offers a long-term, integrative analysis of Western representations of Oman from the medieval period to the present, encompassing diverse geographical, intellectual, and disciplinary contexts. It adopts a transnational and comparative perspective that goes beyond Anglophone scholarship by including contributions from Italian, Russian, and Polish academic traditions alongside those from British, French, German, and American scholarship. This broader corpus allows for a more nuanced understanding of how Oman has been perceived and interpreted across different scholarly cultures and historical periods. The extensive chronological framework further enables tracing the evolution of interpretive approaches and narrative constructions, from early commercial and imperial engagements to more specialised and critically informed academic research.

By situating these varied sources within a single analytical framework, the paper moves beyond a descriptive catalogue of authors and texts to examine the dynamic processes through which Western knowledge about Oman was produced, transmitted, and reinterpreted over time. This approach contributes

to a historically grounded understanding of Western engagements with Oman and their enduring impact on both external perceptions and local historiography. Examining the subject from these multiple angles provides a clearer picture of the European Orientalist perspective on “the Eastern other.” While Western writers’ approaches evolved over time, their attitudes were often applied not only to Oman but also to other Near Eastern regions. Nevertheless, this study focuses specifically on Oman – its contemporary geographical location and borders, as well as the intersections among the various approaches outlined above, which often resist neat categorisation. When considered together, these approaches reveal shared features and patterns across different texts and periods. Recent bibliographical compilations on Oman studies (King and Stevens, 1973; Custers, 2016) provide valuable resources for contextualising these contributions and understanding their significance within the broader history of Western scholarship on Oman.

### **Early European Encounters and Pre-Modern Representations**

European engagement with Oman and the wider Arabian/Persian Gulf evolved significantly between the late medieval and early modern periods, reflecting broader transformations in global trade, maritime technology, and imperial ambition. Scholarship on this engagement has increasingly emphasised continuity as well as rupture: while the Portuguese voyages of exploration in the sixteenth century marked a decisive shift in the balance of power in the Indian Ocean, they also built upon earlier patterns of commercial interaction and knowledge production established by Mediterranean merchants in the centuries preceding European overseas expansion.

The period between the 7<sup>th</sup> and 9<sup>th</sup> centuries AH (13<sup>th</sup> to 15<sup>th</sup> centuries CE) witnessed the intensification of maritime trade linking the Mediterranean with the Indian Ocean. Italian maritime republics – especially Venice and Genoa – played a central role in this process, acting as intermediaries between European markets and the Islamic commercial world. Merchant reports, travel accounts, and cartographic materials from this period constitute the earliest sustained European references to Oman, appearing notably in Marco Polo’s descriptions of Hormuz, Qalhat, and Dhofar. Although shaped by the conventions and limitations of medieval travel literature, these accounts reveal Oman’s integration into long-distance trade networks and its importance as a maritime hub connecting the Persian Gulf with the Arabian Sea and beyond.

More substantial documentation emerged from the commercial archives of Genoese and Venetian merchants, generated during an era of intense rivalry for access to Eastern goods. Genoa’s establishment of a trading post in Shiraz, managed through guild structures and deliberate secrecy, illustrates

the sophistication of late medieval European commercial practices and their reliance on Islamic-dominated trade systems. As demonstrated in the work of Piacentini Fiorani and Maestri, these archives include the earliest European references to Oman as *Dār al-amān* (“The House of Safety”), a designation that underscores perceptions of political stability, legal protection, and commercial reliability.

This late medieval phase of European engagement with Oman was predominantly commercial in character and adaptive in practice. European merchants operated within well-established Indian Ocean trading systems dominated by Arab, Persian, and Indian actors, and were largely dependent on existing local intermediaries, port infrastructures, and institutional frameworks. As Abu-Lughod (1989), Chaudhuri (1985, 1990), and Subrahmanyam (1990, 2005, 2012) argue, this period is best understood not in terms of European dominance, but rather as one of asymmetric interdependence, in which European commercial participation was conditioned by the structures and norms of Islamic and Asian maritime economies. Reconstructions of Oman’s role during this era, drawing on both European and Islamic sources, challenge interpretations that cast the region as peripheral, instead highlighting its active and integrative function within wider Afro-Eurasian trade networks. Early scholarly interpretations of Mediterranean and Indian Ocean commerce were shaped by the *longue durée* framework advanced by Fernand Braudel, whose emphasis on geographical and structural constraints provided a foundational model for maritime history. While Braudel’s approach remains influential, subsequent scholarship has critically reassessed its Mediterranean-centred orientation and expanded the analytical focus to recognise the Indian Ocean as a dynamic and interconnected commercial world in its own right, characterised by multiple centres of agency and long-standing transregional linkages (Abu-Lughod, 1989; Chaudhuri, 1985, 1990; Subrahmanyam, 1990, 2005, 2012).

A major historiographical and material shift occurs with the Portuguese voyages of exploration in the late fifteenth and early sixteenth centuries. The opening of the Cape of Good Hope route fundamentally altered maritime navigation, allowing Portugal to bypass Mediterranean intermediaries and inaugurating a new phase of direct European intervention in the Indian Ocean. Unlike the Genoese and Venetians, the Portuguese combined commercial objectives with military force and territorial occupation. Oman became a focal point of this strategy, culminating in Portuguese control over key ports and fortifications along the Omani coast between 1507 and 1650.

The Portuguese presence generated a far richer and more systematic body of documentation than earlier medieval sources. Early travellers, administrators, and chroniclers such as Duarte Barbosa, Tomé Pires, João de Barros, Gaspar

Correia, Afonso de Albuquerque, and Pedro Teixeira produced detailed textual accounts of Oman, Muscat, Sohar, Qalhat, and the Kingdom of Hormuz. These works provide invaluable information on maritime trade, urban life, military campaigns, and imperial strategy in the Persian Gulf. Texts such as Barbosa's descriptions of Indian Ocean ports, Pires's *Suma Oriental*, and Barros's *Décadas da Ásia* reveal how Oman and Hormuz were conceptualised as strategic nodes essential to controlling Gulf commerce. Albuquerque's correspondence further exposes the geopolitical logic underpinning Portuguese ambitions, particularly the desire to dominate chokepoints and maritime corridors.

Visual and cartographic sources from this period, including the *Código Casanatense*, complement textual records by offering some of the earliest European depictions of Muscat and Hormuz. These images illustrate fortifications, settlements, and shipping activity, providing material evidence of the transformation of Omani coastal spaces under Portuguese occupation. Together, textual and visual materials form a foundational corpus for reconstructing the political, economic, and maritime history of Oman during the sixteenth and seventeenth centuries.

The arrival of what is often termed the Age of Imperialism (16<sup>th</sup> to 19<sup>th</sup> centuries) also ushered in more systematic and chronological record-keeping. Portuguese archives, in particular, document not only major political and military events but also aspects of daily social and urban life, rendering them an indispensable component of Oman's historical heritage. From the 17<sup>th</sup> century onward, British, Dutch, and French archival sources further expanded the documentary record. The archives of the Dutch East India Company and the British East India Company offer detailed insights into commercial practices, diplomacy, and regional power struggles, though historians have noted the methodological challenges involved in disentangling competing imperial perspectives and interests.

Modern scholarship on Portuguese activity in Oman and the Persian Gulf began to coalesce into a distinct field in the mid-twentieth century. Charles R. Boxer laid early foundations with his studies of the Portuguese maritime empire, notably *The Portuguese Seaborne Empire, 1415–1825*, which contextualised Portuguese naval power and administration within a global imperial framework. Jean Aubin significantly refined this approach through his meticulous studies of Hormuz under Portuguese and Safavid rule, drawing on Portuguese, Persian, and Arabic sources to illuminate the complex political dynamics of the Gulf.

Subsequent scholars further deepened the field. Luís Filipe Thomaz's work on the *Estado da Índia* clarified the ideological and administrative logic of Portuguese expansion, while Rui Manuel Loureiro focused on diplomatic

encounters and documentary traditions linking Portugal to the Persian Gulf. Anthony Disney contributed analyses of imperial governance and trade structures, and Giorgio Rota integrated Safavid and Persian perspectives into the study of Portuguese–Iranian relations. More recently, Sanjay Subrahmanyam has reframed historiography through a connected history approach, situating Oman and Hormuz within broader transregional networks of commerce, diplomacy, and cultural exchange.

This trend has been extended by a new generation of scholars, notably Dejanirah Couto and João Teles e Cunha, whose work emphasises intercultural diplomacy, maritime networks, and the political, economic, and social structures of Portuguese rule in the Arabian Peninsula. Collectively, this scholarship has transformed the study of Portuguese presence in Oman from a largely descriptive imperial narrative into a critical, multilingual, and comparative field. When read alongside earlier medieval merchant sources, it reveals both continuity and transformation in European engagement with Oman – from commercial adaptation within Islamic trade systems to imperial domination and, ultimately, to modern historiographical reassessment.

### **European and Western Engagement with Oman: From Medieval Travelers to Modern Scholarship**

European interactions with Oman, spanning the medieval period to the mid-20<sup>th</sup> century, have produced a rich and multilayered body of knowledge that continues to shape contemporary understanding of the region. The earliest accounts were largely travel narratives, beginning with Marco Polo in the 13<sup>th</sup> century, who provided one of the first European descriptions of Oman’s coastal regions, emphasising its strategic location within the Indian Ocean trade networks. These narratives combined curiosity, observation, and commercial interest, marking the initial European encounter with Omani society and economy.

In the 16<sup>th</sup> and 17<sup>th</sup> centuries, Portuguese chroniclers such as Tomé Pires (c. 1468–c. 1540) in his *Suma Oriental* (1515), Fernão Mendes Pinto (c. 1509–1583) in *Peregrinação*, and (c. 1590–1641), along with the *Codice Casanatense*, produced systematic observations of Oman’s ports, fortifications, maritime trade, and political organisation. These accounts combined textual, visual, and cartographic detail, creating some of the earliest European representations of Omani society. However, they were inevitably filtered through the perspectives of foreign merchants and colonial observers, reflecting both curiosity and commercial priorities. Dutch travellers in the seventeenth century, including Johan Nieuhof (1618–1672) and Olfert Dapper (1636–1689), extended this knowledge through VOC-sponsored reports, emphasising Oman’s economic

networks, urban centres, and maritime culture. While their work was often pragmatic – designed to aid Dutch trade – it also contributed valuable ethnographic observations, laying a foundation for later European scholarship.

From the 17<sup>th</sup> through the 19<sup>th</sup> centuries, British travellers and consular officials such as Robert Lambert Playfair (1828–1899) and Samuel Barrett Miles (1838–1914) combined first-hand observation with official correspondence to document Oman’s tribal structures, governance, and commercial life. Their writings reflect both systematic empirical documentation and the influence of British imperial priorities, producing knowledge that would be foundational for later Orientalist and academic scholarship. Alongside textual accounts, Enlightenment-era scientific observers such as Carsten Niebuhr (1733–1815) contributed cartographic precision and empirical methodology, while 19<sup>th</sup>-century artistic representations offered visual interpretations of Oman, further enriching European perceptions of its society, culture, and landscape.

The 20<sup>th</sup> century witnessed a diversification of perspectives, as Western engagement with Oman shifted from exploratory and administrative observation to more systematic academic and field-based study. Scholars, diplomats, and military officers—including Ronald Wingate, James Morris, John Townsend, and Donald Hawley (Wingate, 1959; Morris, 1957; Hawley, 1976, 1977; Townsend, 1977) – provided detailed accounts of Oman’s social and political structures, landscapes, and modernisation processes. Military figures involved in conflicts such as Jabal al-Akhdar and Dhofar (Akehurst, 1982; Skeet, 1974, 1992; Smiley, 1960, 1975) contributed operational and strategic perspectives, documenting the interplay between local authority, insurgent movements, and regional geopolitics. These accounts, while shaped by personal, political, or imperial perspectives, offer invaluable empirical evidence for understanding Oman’s social, political, and military history. Wilfred Thesiger, in particular, with his immersive ethnography in *Arabian Sands* (1959), provided a vivid and empathetic portrayal of Oman’s tribal and desert societies, emphasising oral traditions, human resilience, and the lived experiences of Omanis, complementing archival and administrative narratives.

Collectively, these travellers documented Oman through a combination of narrative storytelling, empirical observation, and political commentary, producing a rich yet inherently subjective record. This record not only laid the groundwork for subsequent scholarly research but also reflected the authors’ personal, commercial, and political perspectives. The combined contributions of travellers, colonial administrators, military officers, and professional scholars reveal a layered and evolving understanding of Oman. Early travel narratives and consular reports provided descriptive, ethnographic, and visual accounts, often mediated through commercial or imperial frameworks. 20<sup>th</sup>-

century scholarship introduced greater empirical rigour, archival precision, and methodological sophistication, incorporating approaches from archaeology, fieldwork, philology, and Islamic studies. Together, these works offer a multi-dimensional perspective on Oman's landscapes, societies, governance, and religious life, illustrating how Western knowledge of the Sultanate has been constructed, contested, and refined over time. Crucially, they underscore that a comprehensive understanding of Oman requires integrating observation, textual analysis, and field-based research – a convergence of perspectives that continues to shape contemporary historiography and deepen our appreciation of the Sultanate's complex history, culture, and role within the broader Indian Ocean world.

### **Imperial Archives and Colonial Knowledge Production**

British archives contain some of the most extensive and critical documentation on modern Omani history, particularly from the late eighteenth century to the present. Extending geographically from Oman to East Africa and the Indian subcontinent, and chronologically across nearly four centuries, these records have been published in sequential series and remain an indispensable source for scholars of Omani and Indian Ocean history (Aitchison, 1909; Tuson, 1979, 1985; Tuson and Quick, 1992; Trench, 1994). Taken together, British archival materials provide multiple layers of historical knowledge about Oman, including diplomatic correspondence, political treaties, commercial networks, maritime security, and imperial administration, reflecting Britain's long-standing strategic engagement with Muscat and its rulers.

In addition to British records, French archival materials have contributed important, though more uneven, insights into Omani–European relations. Recent work by Xavier Beguin-Billecocq has brought to light previously underutilised documents from French archives that shed new light on Omani–French diplomatic and commercial interactions from the late eighteenth century onward (Beguin-Billecocq, 1991, 1994, 1995). However, because French political and strategic interest in the Indian Ocean fluctuated over time, the archival record is comparatively fragmented, offering episodic rather than continuous coverage of Oman (Germain, 1868a, 1868b).

Russian archival sources, preserved primarily in the Russian State Archive of the Navy, reflect a more limited but still significant phase of external engagement with Oman and the Gulf. These materials date mainly to the 19<sup>th</sup> century, when Russia sought access to the warm waters of the Indian Ocean and briefly turned its attention to the Persian Gulf. Russian interest declined following the Bolshevik Revolution, and, as a result, the surviving

archival extracts cover only part of the nineteenth century, offering insight into diplomatic ambitions and naval perceptions rather than sustained political involvement (Rezvan, 2013).

American records, held chiefly at the American Reform Mission in Michigan, provide a different and particularly valuable perspective on Omani history. From the establishment of the American Mission in Oman in 1896, missionaries produced extensive written reports, photographs, and personal observations documenting public life, social conditions, health, education, and everyday practices, especially in Muscat. These materials may be regarded as a “general record of Oman,” offering a rare social and visual complement to the predominantly political and diplomatic European archives (Scudder, 1998). In addition, the National Archives and Records Administration (NARA) in Washington, D.C., holds a significant collection of American documents relating to Oman, including diplomatic correspondence, trade reports, and political analyses, which can further enrich historical research. Together, these sources provide a comprehensive, multinational foundation for reconstructing Oman’s political, social, and economic history across both the early modern and modern periods.

Other key sources for the modern history of Oman and the Persian Gulf include John Gordon Lorimer’s *Gazetteer of the Persian Gulf, Oman and Central Arabia*, published by the British Government in India in 1908. This encyclopaedic work remains an indispensable reference for contemporary researchers, offering detailed information on political structures, geography, tribal relations, and diplomacy across the region (Lorimer, 1908; Warden, 1856a, 1856b). At the same time, the *Gazetteer* must be approached critically, as it represents a form of colonial knowledge production explicitly designed to serve imperial administrative and strategic objectives, privileging British political interests while marginalising local epistemologies and Omani perspectives. As Fuccaro has demonstrated, such bodies of knowledge functioned “at the service of the British Empire,” shaping regional narratives in ways that facilitated governance and control rather than historical neutrality. By the early twentieth century, however, imperial administrations were no longer the sole producers of systematic knowledge about the Gulf. Following the discovery of oil, corporate archives maintained by major oil companies – notably the Arabian American Oil Company (ARAMCO), Shell, and British Petroleum (BP) – emerged as another influential layer of documentation. These companies employed specialists in historical, geographical, and political research alongside technical staff, generating extensive records on the region’s social, economic, and political conditions. ARAMCO, in particular, has published some of the most comprehensive datasets on Arabian

affairs, following its concession agreement with Saudi Arabia in 1933 and its expanding presence in the region from the 1950s onward (Rentz 1974, 1997). Yet, like colonial archives, corporate oil records were produced within specific institutional, economic, and ideological frameworks, shaped by concessionary interests, resource extraction, and corporate – state alliances. Consequently, both Lorimer’s *Gazetteer* and oil company archives must be read not only as repositories of information about Oman and the Gulf, but also as historical artefacts that reveal how knowledge was structured, instrumentalised, and mobilised to serve imperial and corporate power.

### **Translation and the Orientalist Discovery of Omani Texts**

After Napoleon’s Egyptian campaign of 1799–1801, the East began to be seen in a new light. The scholars, archaeologists, historians and philologists who accompanied imperial European military campaigns were influenced by two factors: first, Europe’s Age of Enlightenment and, second, the scientific renaissance that accompanied the Industrial Revolution, which gave a boost to the development of European academic institutions, including disciplines such as history, philology and archaeology. One result of this was the emergence of a new kind of materialist interpretation of history. It was also during this period that the central German, French, British, and Dutch schools of Orientalism emerged as a distinct field of study. Imperialism became a feature of the global political landscape and took on a particularly European cultural hue. Said discusses this transitional phase in his examination of Orientalism and the power–knowledge relationship.

The academic world outside Oman first encountered Omani culture primarily through translations of European travel accounts, which described the region’s ports, trade networks, social life, and political structures. Over time, European scholars also became increasingly drawn to Omani classical historical texts, such as letters of Omani Imams, chronicles of Ibadi scholars, and legal and theological writings. Translations of these works allowed scholars to access Oman’s own accounts of political events, trade relations, and religious debates, providing insight into the country’s role in the broader Islamic world. Importantly, these texts also conveyed the Ibadi perspective on Islamic history, highlighting doctrinal interpretations, community governance, and theological discourse that differed from Sunni and Shi‘i narratives. By combining translated European travel accounts with indigenous Omani sources, scholars gained a more nuanced understanding of Oman’s classical Islamic history, its religious institutions, and the social and political dynamics that shaped the Ibadi community.

The famous French Orientalist Silvestre de Sacy (d. 1838) translated the letters of Imam Saïd bin Ahmed bin Saïd to the French Consul in Baghdad, Rousseau (de Sacy, 1827, vol. 3, pp. 119–38). The Rev. George Badger produced the first work in English on Oman’s history in 1871, when he published his translation of *al-Faḥ al-mubīn* as *History of the Imams and Seyyids of Oman*. His lengthy “Translator’s Introduction” was an early example of Omani history viewed from a European perspective (Badger, 1871). Badger also collected many Omani manuscripts, which are still held today in his name at Cambridge University Library. The next initiative in this field was taken by Edward Ross in 1874, when he translated the historical chapters from *Kashf al-ghumma* – a work attributed to Sarḥān al-Izkawī or al-Sarḥānī – under the title *Annals of Oman*. This translation was a significant new resource for students of Omani history (Ross, 1874).

Subsequently, several scholars began to study sections of *Kashf al-ghumma* using Ross’s translation of excerpts. To this day, that book remains recognised as an early source for Ibadī and Omani history. In his recent study of it, John Wilkinson raises two points: first, he doubts whether – as certain scholars claim – it was really written by Sarḥān al-Izkawī (there are still question-marks over its attribution); second, he downplays the importance of the man who wrote it, whom he regards as a copyist rather than its actual author, since his book has no proper structure. In Wilkinson’s opinion, it is no more than a collection of early writings copied down by the “author” and lumped together in a single book, taking al-Qalhātī’s *al-Kashf wa al-bayān* (7–8<sup>th</sup> AH /13<sup>th</sup> CE century) as its primary source. This would indicate that the collation attributed to the supposed author has been given unjustifiable precedence over the source material it comprises.

Although Nur al-Dīn al-Sālimī’s (d. 1914) *Tuḥfat al-a’yān bi-sīrat ahl ‘Umān* had not yet been translated, it attracted the attention of the French and Italian schools, and it is mentioned in the writings of the Polish Orientalists Zygmunt Smogorzewski and Tadeusz Lewicki (Smogorzewski, 1927 [publ. 1929]). In addition, Laura Vecci Vaglieri, who wrote an article entitled *The Imamate in Oman* (1949), drew much of her material from al-Sālimī’s book and compared it favourably with other sources (Veccia Vaglieri, 1949; Rubinacci, 1989). The book was also reviewed in 1936 by Reginald Guest (Guest, 1936). Recently, Jerzy Zdanowski has been working on the complete translation of *Tuḥfat al-a’yān*, which is expected to be published in 2026.

Martin Hinds translated the section on the al-Muhallab family during the Umayyad era from al-‘Awtabī’s *al-Ansāb* as part of his study of early Islamic history (Hinds, 1991). From the East African side, Samuel Arthur Strong published ‘Abdullāh. b. Muṣabbih Ṣawwāfi’s *Kitāb al-Salwa fī akhbār Kitwa*

in 1895 (Strong, 1895). It was later translated by Greville Freeman (Freeman-Grenville, 1966), who eventually became the leading expert on Islamic history in East Africa and published several works about Omani rulers and settlements in East Africa, including the history of the Nabhānī dynasty from Oman, who ruled the Pate Kingdom in East Africa (Freeman-Grenville, 1958, 1965, 2000).

### **Writing Omani History in the Orientalist Tradition**

Translations, political reports and accounts of archaeological expeditions had a significant impact on the books on Omani history written by Western Orientalists. Edward Ross followed up the publication of his translation with several articles on Omani history (Ross, 1868, 1881, 1883). However, the standard Orientalist take on Omani history dates back to the publication of Samuel Miles's *The Countries and Tribes of the Persian Gulf* (1919), the first European work to chronologically describe Omani history. For his primary source material, Miles used both Ross's and Badger's translations, while his secondary sources included Classical Arabic literature and reports from archaeological missions' excavations (Miles, 1966). Miles was an explorer and political agent with extensive knowledge of the region, particularly Oman, so his observations and conclusions are still regarded as valuable and valid today (Miles and Munzinger, 1871; Miles, 1877, 1880/1881, 1896, 1987).

In 1914, the Franco-Persian author Firouz Kajare published a book in Paris about the history of Omani diplomacy and the conflict between the French and British in Muscat (Kajare, 1914).

By the late 19<sup>th</sup> century, a noticeable divergence emerged between the German and British Orientalist schools in their approach to the study of Oman. The British school, shaped by imperial administrative concerns and the practical needs of colonial governance, prioritised detailed documentation of political structures, commercial networks, tribal relations, and diplomatic affairs, often drawing on official correspondence, consular reports, and travel accounts. In contrast, the German school – less tied to colonial administration – approached Omani studies from a more philological, historical, and sometimes anthropological perspective, emphasising textual analysis, classical sources, and religious studies, particularly the study of Ibadi Islam and early Omani historiography. This divergence reflects not only different scholarly traditions and methodological orientations but also the broader political and institutional contexts in which knowledge about Oman was produced: British scholars operated within an imperial framework that demanded utility and accuracy for policy, whereas German researchers were largely engaged in academic inquiry independent of immediate political imperatives. The German school began in East Africa with the famous Orientalist Eduard Sachau's translation in 1894 of

a section of al-Bisyāwī's *Mukhtaṣar*; followed by a series of studies, including Ibn Ruzayq's *History* (1899) and an excerpt from *Kashf al-ghumma* dealing with the letters from 'Abdallāh b. Ibād to 'Abd al-Malik b. Marwān (Sachau, 1894, 1898a, 1898b, 1899). In 1894, Carl Reinhardt sought a link between Oman and East Africa in the dialects of Oman and Zanzibar and examined Oman's history in Zanzibar (Reinhardt, 1894). In 1892, Rochus Schmidt published a book on the history of the Arabs in East Africa (Schmidt, 1892), followed in 1927 by Richard Vasmer's book on Omani coins, and in 1939 by Hedwig Klein's publication of the *Kashf al-ghumma* section originally translated by Ross (Klein, 1938).

The Germans also conducted several studies on the region's geography. Walther Wessler wrote a general description of the geography of the districts of Wādī al-Ma'āwil and Nakhl in 1898. Immediately after the Second World War, German contributions to Omani studies came to a halt, perhaps mainly due to the division of Germany into East and West and the Communists in the East's support for the rebellion in southern Oman. However, there remains extensive German literature on the history of Oman-East Africa (Schmidt, 1892; Pesek, 2002; Schnepfen, 1999, 2006). German interest in Oman studies resumed in the early 1970s, with various approaches focusing on archaeological and geographical missions (Scholz, 1977, 1981, 1984, 1997, 2009; Scholz and Janzen, 1982; Yule, 1999).

In Britain, Orientalist studies were given a boost by Bertram Thomas, whom we may rightly regard as the founder of the "scientific" approach. He established three new fields: 1) anthropological studies, 2) philological studies of the colloquial Omani dialect, and 3) archaeological records. Thomas's writings and views offer essential insights for students in these areas (Thomas, 1929a, 1929b, 1929c, 1930, 1931a, 1931b, 1931c, 1931d, 1932, 1937, 1938a, 1938b).

Rudolph Said-Ruete (1869–1946) was a member of the Omani royal lineage and the son of Princess Salma/Sayyida Salme bint Said (Emily Ruete). While his mother's *Memoirs of an Arabian Princess* (1886, a scientific edition: 1993) – which he helped edit and publish – provided one of the earliest European-language first-person accounts of Omani court life and Indian Ocean connections, Rudolph Said Ruete made his own contributions to Omani historiography. In 1929 in London, he wrote two historical texts: one on the Āl Bū Sa'īdī family and another on Sultan Sa'īd bin Sulṭān. These works are particularly valuable because they present the history of Oman's ruling dynasty from an independent perspective, authored by an Omani figure outside formal court historiography (Said-Ruete 1929a; Said-Ruete 1929b). Together with travel narratives and archival sources, these writings enrich the Western scholarly understanding of Oman's political and social history.

The British Orientalist school's distinctive "scientific approach" to Middle Eastern history was significantly advanced by Laurence Lockhart (1890–1975), whose work combined meticulous archival research with a regional analytical lens. In his 1935 article on Nādir Shah's campaigns in Oman (1737–1744), published in the *Bulletin of the School of Oriental and African Studies*, Lockhart examined interactions between Oman and Iran and the involvement of European powers, especially Britain and France, within a systematic historical framework that went beyond narrative travel accounts.<sup>1</sup> He later expanded his research with further historical studies, including investigations into earlier Omani threats in the seventeenth century.<sup>2</sup> Lockhart's commitment to rigorous use of primary and comparative sources influenced a generation of British scholars, encouraging deeper engagement with diplomatic, military, and regional records rather than descriptive travel literature. This shift is evident in the work of Charles Fraser Beckingham, whose 1941 study of Imam Ahmed bin Said's reign employed similar source-based methods to reconstruct Omani political history.<sup>3</sup> Subsequently, scholars such as John Kelly and others in mid-20<sup>th</sup> century Gulf studies continued to build on Lockhart's model, integrating archival material with regional analysis and helping to institutionalise scientific historical practice in the study of Oman and its relations with neighbouring states.

During the late 19<sup>th</sup> and early 20<sup>th</sup> centuries, the majority of scientific and academic Orientalist research concerning Oman and the Arabian Peninsula was published in a limited number of scholarly outlets, primarily the *Journal of the Royal Asiatic Society* and the *Geographical Journal*. These journals predominantly focused on the Indian subcontinent and regions connected to the British Empire in the Indian Ocean, reflecting the broader priorities of British scholarship and administration at the time. The emphasis on these regions was not coincidental: Oman's strategic position at the entrance to the Persian Gulf, along major maritime trade routes, and its political ties to British India meant that the British Raj directly influenced the study of Oman, including through the appointment of the British representative in Muscat. Consequently, much of the early scholarly output on Oman was framed through the lens of imperial administration and regional geopolitics, emphasising trade, diplomacy, and the strategic importance of Omani ports. This focus both shaped the research's content and determined which sources and archival materials were accessible to European scholars, laying the foundation for later, more systematic, historical studies.

## **From Colonial Knowledge to Academic Professionalisation: The Evolution of Western Scholarship on Oman**

The study of Oman by Western scholars over the twentieth century illustrates a remarkable transformation, moving from exploratory and colonial-administrative knowledge to rigorous, interdisciplinary academic research. Early engagements with Oman were often shaped by political and strategic interests, as Western governments and their officials encouraged scholarship that could support diplomatic or administrative objectives. By the post-First World War period, a significant new political and intellectual element emerged: scholars and students increasingly pursued careers in politics, colonial administration, or the military, while their academic inquiries frequently intersected with contemporary policy concerns. This blending of scholarship and state interest, while producing rich empirical data, also foregrounded questions about the influence of imperial perspectives on academic interpretations.

Within this context, John B. Kelly (1925–2009) of Oxford University exemplifies the convergence of scholarship and political engagement. Kelly first gained prominence with his study of the Buraimi border dispute in 1956, analysing competing claims over strategic northern Omani oases. This early research was followed by *The Sultanate and the Imamate in Oman* (1961) and *Eastern Arabian Frontiers* (1964), as well as later studies on Britain's early presence in the Gulf and its regional conflicts (1972, 1976). Beyond academia, Kelly served directly for the British government during the Buraimi dispute and later advised Sheikh Zayed in Abu Dhabi. These dual roles afforded him unparalleled access to archival materials and insider knowledge, enriching his scholarship while also raising questions about potential imperial or state influence. Nonetheless, Kelly's methodology – combining political, social, and regional analysis – set a benchmark for subsequent scholars, demonstrating how disciplined, source-based research could transcend the limitations of colonial narratives and travel accounts.

By the late 1960s, Oman had emerged as a focal point for a new generation of Western scholars, particularly doctoral students seeking to explore the Gulf's political, social, and religious dynamics. Robert Landen was among the first to formalise this trend. His landmark study, *Oman Since 1856* (1967), provided one of the earliest comprehensive historical accounts of the modern Sultanate. Landen's work exemplifies the Anglo-American archival and empirical approach, situating Oman within regional geopolitics, British imperial interests, and the transformations of Gulf polities. By foregrounding documents, treaties, and local administrative records, Landen established a model for studying Oman's state formation and diplomacy with methodological rigour.

In parallel, Wendell Phillips, an American archaeologist and oil magnate, introduced a complementary, field-oriented approach. His expeditions in the 1950s and 1960s, documented in *Unknown Oman* (1958) and subsequent publications (1966, 1967), combined archaeological survey, ethnographic observation, and historical commentary. Phillips' work provided vivid insights into Oman's landscapes, settlements, and material culture, bridging textual and archival history with the tangible realities of Oman's geography, architecture, and social life. Unlike purely archival historians, Phillips highlighted the interplay between environment, settlement patterns, and social organisation, contributing to a more holistic understanding of Omani society in the mid-twentieth century.

Earlier, in 1956, Elie Salem of Johns Hopkins University produced *Political Theory and Institutions of the Khawarij*, examining the theological and political foundations of Ibadism. Salem's work, though doctrinal in focus, illuminated the ideological and social underpinnings of Oman's Imamate. By tracing the intellectual, legal, and governance structures of the Ibadi community, Salem linked classical Islamic scholarship with the empirical studies that would follow in the 1960s. His research provided crucial context for understanding the continuity between Oman's medieval and modern political structures, laying the groundwork for subsequent interdisciplinary studies.

While these scholars addressed the modern and historical dimensions of Oman, John Wilkinson serves as a crucial bridge between classical Islamic sources and modern scholarly methods. Over a career spanning five decades, Wilkinson traced Oman's socio-political development from the early Islamic era to the present. His seminal works, including *Muscat and Oman* (1964) and subsequent monographs and articles (1971–1977), combined meticulous philological analysis of classical Arabic texts with historical geography, archaeology, and ethnographic observation. Wilkinson's research explored the structures of the Imamate, the role of Ibadi jurisprudence in governance, tribal networks, and the historical evolution of Omani settlements and fortifications. By contextualising textual sources within the physical and social landscapes of Oman, Wilkinson provided a comprehensive and multidimensional framework for understanding Omani history, demonstrating the value of integrating textual, field, and comparative methods.

Wilkinson's contemporaries, including Robert B. Serjeant, Robin Bidwell, Raymond Bathurst, and G. Rex Smith, extended his work by drawing extensively on Omani manuscripts, archival documents, and oral histories, forming a scholarly network that enriched empirical knowledge and fostered collaboration. Meanwhile, the English school significantly advanced philology, particularly on southern Arabian dialects and non-Arabic languages spoken in

Oman. Thomas M. Johnstone pioneered studies of southern Arabian linguistic traditions and literary folklore, connecting Oman with South Yemen (1974–1987). Later philologists, such as Peter Emery, Clive Holes, David Insall, Aaron Rubin, and Miranda Morris, continued this trajectory, demonstrating the enduring importance of language, literature, and cultural context for understanding Oman’s society (Emery, 1997; Holes, 1989, 2013; Rubin, 2010, 2014; Morris, 1987).

Taken together, the scholarship of Kelly, Landen, Phillips, Salem, and Wilkinson illustrates the diversification and professionalisation of Omani studies in the mid-20<sup>th</sup> century. Archival research, ethnography, archaeology, philology, and Islamic studies converged, producing a richer, interdisciplinary understanding of Oman’s political, social, and cultural history. This period marked a decisive shift away from colonial and exploratory knowledge – rooted in administrative reports, travel accounts, and missionary writings – toward academically rigorous approaches, emphasising methodological transparency, field observation, and critical engagement with sources.

The evolution of Omani studies also reflects broader trends in Orientalist scholarship. By integrating political history, material culture, theological analysis, and philology, these scholars demonstrated the interplay between empirical evidence, classical texts, and lived social realities, highlighting Oman as a key site for understanding state formation, religious governance, and Gulf regionalism. Moreover, this period laid the foundation for interdisciplinary methodologies that continue to shape contemporary scholarship, bridging history, anthropology, archaeology, and Islamic studies.

In conclusion, the history of Western scholarship on Oman underscores the complex interplay between intellectual ambition, methodology, and political context. From John B. Kelly’s politically engaged historiography, through Robert Landen’s archival rigour, Wendell Phillips’ field-oriented observations, Elie Salem’s theological analysis, to John Wilkinson’s integrative philological and historical approach, the study of Oman evolved into a mature, professionalised, and reflexive academic discipline. This intellectual trajectory reflects not only a methodological evolution but also the growing recognition of Oman as a dynamic site for investigating broader historical, cultural, and political processes, from Ibadi governance and social organisation to the transformations of the modern Gulf.

### **Modern Western Scholarship and New Methodologies**

During the late 20<sup>th</sup> century, a new generation of scholars emerged in the study of Oman, reflecting broader trends in Orientalist, post-Orientalist and interdisciplinary scholarship. This scholarship can be broadly divided into

three complementary domains: anthropological and social studies, modern Omani history and international politics, and critical or leftist approaches that interrogate imperial and state-centred narratives.

The first domain, anthropological and social studies, was led by American scholars such as Dale Eickelman, whose extensive research (1980, 1983, 1984, 1985, 1987, 1989, 1990, 1991, 1993) combined ethnography with the analysis of religious, social, and political structures in Islamic societies. Although relatively few scholars have specialised in Oman from a strictly scientific or ethnographic perspective, this field gradually expanded, paying particular attention to the dynamics of Islamic societies, religious reform movements, and contemporary fundamentalist trends, including their implications for Oman. Within this socio-ethnographic domain, Western interest also emerged from Norway, Germany, Poland, the UK, and the USA, producing studies that illuminate local kinship structures, tribal authority, and everyday life. Notable contributors include Unni Wikan (1982), Christine Eickelman (1984a, 1993), Thomas Bierschenk (1984, 1985, 1988, 1989), Dawn Chatty (1983, 1984, 2005, 2006, 2009), and Mandana Limbert (2001, 2005, 2006, 2008a, 2000b, 2010, 2014). Collectively, these studies demonstrate how classical Orientalist frameworks – initially focused on textual authority and philology – evolved into ethnographic and anthropological methodologies, allowing scholars to engage with local practices, belief systems, and social organisation while maintaining critical awareness of the observer’s positionality.

The second domain concerns modern Omani history and Oman’s role in regional and international politics. John Peterson has been a leading figure in this field since the 1970s, producing empirically grounded studies that situate Oman within broader Gulf and international frameworks. By the early 1990s, a cohort of Anglo-American scholars further advanced this approach, emphasising archival research, fieldwork, and comparative analysis. Among them were Jeremy Jones, Francis Owtram, and James Worrall from the UK; Joseph Kechichian, Lynn Rigsbee, Miriam Joyce, Valerie Hoffman, and Calvin Allen from the USA; and Uzi Rabi from Israel (Jones and Ridout, 2005; Owtram, 2002, 2004; Worrall, 2013; Hoffman, 2004, 2012, 2015; Allen, 1981, 1982, 1987; Allen and Rigsbee, 2000; Joyce, 1995; Kechichian, 1995; Rabi, 2006, 2008a, 2008b). In Central-Eastern Europe, Polish scholars such as Barbara Michalak-Pikulska, author of the twentieth century’s first comprehensive study of modern Omani poetry and prose (Michalak-Pikulska, 2002a, 2000b), expanded the field to include literary and cultural studies, while Andrzej Kapiszewski focused on contemporary socio-political dynamics in the Gulf (Kapiszewski, Al-Salimi, and Pikulski, 2006). Sebastian Žbik contributed a Ph.D. dissertation on the various aspects of the separation of Oman and

Zanzibar after 1856 (Žbik 2024), as well as research on the political positions of Abdulaziz bin Said in the context of British dominance (Žbik 2022). Jerzy Zdanowski has also made substantial contributions to modern Omani history, particularly in the fields of socio-religious Ibadism, trade networks, governance, and state formation (Zdanowski, 2022). This “modernist” school is characterised by a balanced methodological approach that combines archival research, interviews, and fieldwork. While the focus is largely on 19<sup>th</sup>- and 20<sup>th</sup>-century Oman, these scholars provide essential frameworks for understanding the country’s political development, regional interactions, and modernisation processes.

In contrast, a third strand of scholarship has emerged since the 1970s, shaped by leftist or critical perspectives that challenge traditional imperial, state-centred, or nationalist narratives. Key figures in this domain include the Irish scholar Fred Halliday, the Swiss historian Sigrid Stöckli, and the French-British historian Marc Valeri (Halliday, 1974; Valeri, 2003, 2007a, 2007b, 2007c, 2009, 2010; Stöckli, 2011). These scholars employ a broadly critical lens, emphasising the economic, social, and ideological dimensions of Omani history, rather than restricting analysis to elite political or diplomatic events. Halliday’s work, for instance, situates Oman and the Gulf within global economic systems and regional power structures, foregrounding the role of social class, labour and imperial constraints in shaping local developments. Similarly, Valeri interrogates the intersection of tribal, religious, and state dynamics, highlighting how ideological discourses and social structures informed political authority and resistance, while Stöckli emphasises the transnational circulation of ideas and material resources that shaped Omani society.

The theoretical contribution of this scholarship, oriented toward the left, extends beyond Oman and reflects broader trends in modern Middle Eastern studies. It draws on concepts from political economy, Marxist historiography, and postcolonial theory to interrogate the structural conditions – economic dependency, imperial intervention, and social hierarchies – that shaped the modern Gulf. By integrating local developments with global processes, these scholars challenge exceptionalist or insular accounts, presenting Oman not as a passive recipient of external influence but as an actor embedded within asymmetrical networks of power, trade, and ideology. Moreover, their work underscores the importance of ideology, class relations, and material conditions in understanding both the formation of the Omani state and the broader trajectories of the Middle East. In doing so, they have expanded the analytical scope of Omani studies, situating it within comparative debates on modernisation, imperialism, and social transformation across the region.

Taken together, these three strands – anthropological, modern-historical, and critical – demonstrate the evolution of Orientalist scholarship on Oman. Classical European textual and travel-based studies gradually gave way to interdisciplinary, empirical, and reflexive methodologies, allowing modern scholars to critically engage with Oman’s social structures, religious life, political development, and historical representation. At the same time, these approaches highlight the limits and biases of earlier knowledge, emphasising the need to contextualise historical sources – whether travel accounts, archival records, or state documents – within the political and intellectual frameworks in which they were produced.

A notable recent contribution to the study of Oman is *Sultan Qaboos and Modern Oman, 1970–2020*, edited by A. J. Fromherz and A. Al-Salimi (Edinburgh University Press, 2022), which provides a comprehensive examination of the country’s history, culture, and literature. This work is particularly significant for its methodological approach, which synthesises and organises the existing scholarly research on Oman to provide a state-of-the-art overview of the field. The editors systematically collect, assess, and structure a wide range of publications, enabling readers to navigate the complex historiography with clarity and precision. The volume demonstrates a thorough engagement with both textual and archival sources, offering a coherent and up-to-date account of academic scholarship on Oman. Its extensive bibliography represents an invaluable resource for future research, underscoring the editors’ commitment to consolidating and advancing understanding of Omani history and society. This contribution complements earlier historiographical traditions while situating modern Omani studies within broader scholarly debates on state-building, modernisation, and cultural development.

### **Ibāḍī Studies and Transnational Scholarly Networks**

At the turn of the 20<sup>th</sup> century, European Orientalist scholarship on Oman began to diversify, reflecting broader intellectual trends in historiography, philology, and Islamic studies. The French and Italian Orientalist schools played particularly significant roles in shaping the study of Oman, though their approaches were framed by their respective imperial contexts. French scholarship, influenced by the Annales School, emphasised historical texts and sought to integrate the study of Islamic civilisation with social and political history. Leading French scholars, including Zygmunt Smogorzewski, Tadeusz Lewicki, Ernest Zeys, and Pierre Cuperly, produced critical research on Ibadi theology and law, as well as Oman’s historical and commercial interactions with the broader Indian Ocean world. Lewicki’s 1935 study on Omani merchants and early trade links with China and North Africa exemplifies how European

Orientalists combined trade, political, and religious studies to contextualise Oman within regional networks (Lewicki, 1935, 1971). Smogorzewski, in turn, bridged historical and religious scholarship by analysing the political structures and trade networks connecting Oman to other parts of the Islamic world.

Italian Orientalism, while sharing an interest in classical Islamic history, was particularly focused on textual criticism, philosophy, and belief systems, often influenced by the German philological tradition. Prominent figures include Carlo Alfonso Nallino, Mario Martino Moreno, Roberto Rubinacci, and Laura Veccia Vaglieri, whose work contributed to the understanding of Oman's intellectual and religious traditions (Van Ess, 2014; Al-Salimi and Madelung, 2014). Contemporary Italian scholarship continues this tradition through both classical and archaeological studies. Scholars such as Ersilia Francesca, Valeria Piacentini Fiorani, and Beatrice Nicolini have examined early Omani texts, jurisprudence, economic history, and Oman's connections with the Indian Ocean and East Africa, filling critical gaps left by earlier Orientalist studies (Francesca, 1998, 2002, 2003; Piacentini Fiorani, 2000, 2005, 2013; Nicolini, 1996, 1997, 1999–2000, 2004, 2009, 2012). Italian archaeologists, led by Paolo Costa, extended the study of Oman to its Islamic-era architecture and settlement patterns, training a new generation of researchers, including Maurizio Tosi and Eros Baldissera, and collaborating with German scholars such as Heinz Gaube to develop integrated approaches to oasis archaeology (Costa, 1985, 1991, 1993, 1999–2001; Baldissera, 1990–1998; Gaube, 2008; Korn, 2008).

The Dutch and Russian schools also made targeted contributions. Dutch Orientalists, including Emeri van Donzel, focused on biographical and archival studies, producing critical editions and studies of figures such as Sayyida Salme bint Said bin Sultan (1993), while scholars like Willem Floor and Ben Slot explored early Dutch-Omani interactions via VOC archives, emphasising trade and social networks in the Gulf (Floor, 1982, 1985; Slot, 1991, 1995). Russian Omani studies, largely philological and historical, benefited from German methodological influence. Vladimir Rosen and Ignati I. Krachkovski produced important works on Arab geography and navigation, including studies on Aḥmad bin Mājjid, while Danylo Radivilov in Ukraine advanced the study of Ibadi epistolary literature and its historiographical implications for Oman (Rosen, 1887/1880; Krachkovski, 1957; Radivilov, 1998, 1999, 2000, 2010a, 2010b). Notably, Smogorzewski brought Ibadi manuscripts from North Africa to the John Casimir University of Lwów (currently the Ivan Franko National University of Lviv), which remain a crucial resource for historical and theological scholarship (Savchenko, 1989).

Overall, the European Orientalist engagement with Oman demonstrates the interplay of imperial interests, philology, historiography, and ethnography. French and Italian scholars foregrounded classical Islamic intellectual history, the Dutch focused on archival and biographical work, and Russian and Polish Orientalists combined philological rigour with trade and religious studies. Collectively, these efforts not only established a foundation for modern Omani studies but also revealed the layered ways in which knowledge about Oman was produced, transmitted, and framed within both regional and global contexts. The evolution from classical text-focused Orientalism to interdisciplinary, field-based, and comparative studies illustrates how European scholarship has progressively embraced methodological pluralism while maintaining an enduring interest in Omani religious, social, and economic history.

### **Conclusion: Western Scholarship on Oman – Trajectories, Methodologies, and Evolving Perspectives**

The study of Oman by Western and Orientalist scholars has evolved remarkably over the past seven centuries, reflecting broader intellectual, political, and methodological transformations in the Middle East. From the earliest European travellers of the 13<sup>th</sup>–17<sup>th</sup> centuries – such as Marco Polo, Tomé Pires, Fernão Mendes Pinto, and Pedro Teixeira – through Dutch, British, French, and Russian travellers, historians, and administrators, the production of knowledge about Oman has always been intimately linked to wider networks of trade, empire, and diplomacy. These early accounts, though often descriptive and infused with commercial or imperial motives, provided the foundational material for later historical, philological, and ethnographic studies. They documented ports, coastal settlements, trade routes, and tribal structures, giving early European audiences their first glimpses into Oman's social, political, and economic life.

The 17<sup>th</sup>–19<sup>th</sup> centuries witnessed the consolidation of classical Orientalist scholarship, where philology, textual criticism, and historical analysis became dominant methodological tools. French, Italian, and Polish scholars – such as Smogorzewski, Lewicki, Cuperly, Nallino, and Rubinacci – focused on Ibadi theology, classical Islamic law, and Arab maritime history. These studies, while intellectually rigorous, were often coloured by the imperial and national contexts of the scholars themselves: French research drew on North African colonial experience, Italian research was influenced by philological traditions, and Polish scholars published within French academic frameworks. Nevertheless, the comparative and cross-national nature of their work allowed for a richer understanding of Oman within broader Indian Ocean and Islamic contexts. Their attention to classical texts, jurisprudence, and seafaring history

highlighted the sophistication of Omani intellectual and commercial life, even as it reflected the epistemological assumptions of the Orientalist paradigm.

The early 20<sup>th</sup> century saw a turn toward administrative and empirical approaches, particularly within the British Empire. John Gordon Lorimer's *Gazetteer of the Persian Gulf* exemplifies the combination of archival precision, imperial intent, and encyclopaedic knowledge characteristic of this period. Lorimer's work, along with consular reports and corporate archives maintained by Shell, BP, and ARAMCO, provided unprecedented access to political, economic, and military data. Yet these sources were explicitly tied to imperial and corporate interests, requiring contemporary scholars to critically interrogate their biases. Similarly, the works of British administrators, diplomats, and military officers – such as Wingate, Morris, Hawley, and Townsend – remain indispensable for understanding Oman's modern political and military history, particularly in the mid-20<sup>th</sup> century, while simultaneously illustrating how scholarship can reflect the state's strategic objectives.

From the mid-20<sup>th</sup> century onward, anthropological and socio-ethnographic approaches began to reshape Western studies of Oman. Scholars like Dale Eickelman, Unni Wikan, Thomas Bierschenk, Dawn Chatty, and Mandana Limbert introduced ethnography, participant observation, and sociological analysis into the study of tribal structures, kinship, religious reform, and everyday life. This shift from textual authority to fieldwork-based methodologies marked a critical evolution: Orientalist frameworks began to incorporate reflexivity and self-awareness of the scholar's positionality, emphasising the lived experiences of Omanis rather than solely the records produced by elites or colonial administrators.

Parallel to these developments, the study of modern Omani history and international relations gained prominence. John Peterson and later scholars – including Jeremy Jones, Francis Owtram, James Worrall, Joseph Kechichian, Lynn Rigsbee, Miriam Joyce, Valerie Hoffman, Calvin Allen, and Uzi Rabi – emphasised archival rigour, interviews, and comparative regional analysis. This Anglo-American modernist school provided empirically grounded narratives of Oman's state formation, diplomacy, and modernisation, and, while largely focused on the 19<sup>th</sup> and 20<sup>th</sup> centuries, offered reliable frameworks for understanding Oman's political trajectory. Complementing this were critical and leftist-oriented scholars, such as Fred Halliday, Sigrid Stöckli, and Marc Valeri, who interrogated imperial and state-centred narratives, highlighting social justice, global economic networks, and ideological structures. Together, these schools illustrate the pluralisation of perspectives within Western scholarship, moving beyond the limitations of traditional Orientalist paradigms.

European scholarship also diversified geographically and linguistically, with Polish, Italian, Dutch, and Russian scholars producing innovative studies of Oman's socio-religious history, Ibadi thought, maritime trade, literature, and archaeology. Italian Orientalists, for example, expanded archaeological and architectural studies of Islamic-era Oman, while Polish and French scholars advanced Ibadi studies and early Omani intellectual history. These efforts have highlighted the multi-layered nature of Oman's historical record and its connections to broader Indian Ocean, Arab, and Islamic networks, enriching understanding beyond the traditional Anglo-American focus.

The study of Oman has also benefited from critical engagement with archives and corporate records, including Lorimer's *Gazetteer* and the extensive records of oil companies such as ARAMCO, Shell, and BP. These materials, while rich, reflect the strategic, economic, and ideological priorities of the institutions that produced them. Scholars must therefore navigate these sources with care, critically examining the assumptions, silences, and perspectives they embed, a process that aligns with broader postcolonial critiques of knowledge production.

Finally, contemporary scholarship has integrated insights from Ibadi and early Islamic studies, including the work of Josef van Ess, Michael Cook, Patricia Crone, and Martin Hinds, which situates Oman within the broader development of Islamic thought. Combined with Omani government publications on heritage and intellectual history, these studies illuminate the sophisticated religious, legal, and intellectual traditions of Oman's formative periods, revising older perceptions that emphasised peripheral status or marginality.

In sum, the trajectory of Western scholarship on Oman – from early travellers to contemporary postcolonial and interdisciplinary studies – demonstrates the evolution of methodologies, thematic focus, and ideological awareness. It reflects a gradual shift from descriptive, imperial-centred accounts to critical, reflexive, and multidimensional approaches that integrate textual, archaeological, ethnographic, and archival evidence. Modern Omani studies have bridged Orientalist and post-Orientalist perspectives, showing that understanding Oman requires attention to social practices, intellectual traditions, geopolitical dynamics, and historical context. The field's richness lies in its diversity: scholars with different national, methodological, and ideological orientations contribute to a nuanced understanding of Oman, illuminating not only its past and present but also the complex processes through which knowledge about the country has been produced. By engaging with these diverse perspectives, contemporary research fosters a dialogue between "the self" and "the other," enabling a fuller, more mature comprehension of Oman's social, intellectual, and political landscapes.

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HEMISPHERES

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## Iran and Turkey's Secularisation of Education and the Enduring Influence of Clerics

### Abstract

The social and cultural foundations of Iran and Turkey have long been rooted in Islam, expressed through their respective Shia and Sunni traditions. During the early 20<sup>th</sup> century, however, Reza Shah Pahlavi (1878–1944) and Mustafa Kemal Atatürk (1881–1938) initiated modernisation and secularisation reforms aimed at curbing clerical authority, particularly through education. While Atatürk replaced Ottoman Islamic institutions with a secular framework, Reza Shah's efforts were constrained by resistance from Iran's entrenched Shia clergy. Despite these differences, traditional religious values largely persisted and, over time, reasserted themselves. By comparing the education-focused secular policies of both governments their attempts to reduce the influence of Islamic traditions, and the role of clerics, the present research seeks to explain why, despite extensive cultural reforms, Islamic culture and values remained resilient in both societies.

**Keywords:** Iran, Turkey, Islam, education, secularisation, Shi'a, Sunni.

### Introduction

Islam has long shaped social and cultural norms in Iran and Turkey, where Shia and Sunni traditions, respectively, provide the dominant religious frames. In the early 20<sup>th</sup> century, secular reformers, Reza Shah Pahlavi (r. 1925–1941) in Iran and Mustafa Kemal Atatürk (r. 1923–1938) in Turkey, treated education as a principal instrument for curbing clerical influence and reshaping public culture. By centralising schooling, narrowing or removing religious instruction from public curricula, and restricting clerical control over educational content, both governments sought to marginalise traditional teachings and cultivate a modern citizenry aligned with state-led projects of national development.

Despite the political transitions in both countries during the late 1970s, religious groups regained significant influence—even though secularism remained a constitutional principle in Turkey. Although Turkey's constitutional secularism and the comparatively limited autonomy of Sunni clerics might seem to reduce the likelihood of a revolutionary outcome comparable to Iran's 1979 Revolution, religious politics nonetheless revived there, gaining momentum

by the 1980s. These trajectories indicate that institutional secularisation, especially through education, did not necessarily translate into durable cultural secularisation.

The central question, therefore, is why, despite policies intended to secularise the state and restrict religious discourse within educational institutions, Islamist currents and traditional religious orientations persisted, and in some cases strengthened, in both settings.

Addressing this question requires shifting attention from constitutional design and formal policy statements to the social and educational conditions under which secularisation was pursued. Two dimensions are especially important. The first concerns the limited societal groundwork for secularisation at the time these reforms were introduced, a constraint closely tied to the education system itself. Prior to state-led secularisation, both societies were predominantly religious and shaped by traditional modes of socialisation, while levels of mass illiteracy remained high. In this setting, secularisation could not rely on widespread public understanding of secular ideas or on a broad reading public capable of engaging with new political and cultural concepts. This makes it essential to examine how the state attempted to generate the social and educational conditions through which secularism could become intelligible and persuasive to the majority.

The second concerns the institutional endurance of clerical influence during and after reform: the extent to which clerical networks retained moral credibility, continued to shape everyday religious learning outside schools, or re-entered education through informal or regulated channels. Together, these dimensions indicate where the main problem is likely to be located: secularisation may have altered educational governance and reduced overt clerical control, while leaving intact the deeper mechanisms through which religious authority and Islamic traditions were reproduced across society.

This paper argues that short-term modernisation and educational reform do not necessarily produce cultural transformation when clerical actors retain social authority and when schooling does not replace religious instruction with sustained forms of critical inquiry about religion. The analysis adopts a comparative historical approach informed by modernisation theory. It examines education reforms and subsequent religious revival in Iran and Turkey by asking parallel questions in both cases. The study evaluates the extent of educational secularisation through legal change, curriculum design, clerical control, and enforcement practices, and then traces how these policies related to outcomes in religious authority and political mobilisation.

## Review of Literature: Secularisation and Education

A substantial line of scholarship interprets both Iran and Turkey as cases of authoritarian modernisation in which secularisation was pursued primarily through state power, legal redesign, bureaucratic centralisation, and cultural regulation, rather than through sustained social deliberation on religion. In this reading, the decisive limitation was not merely the persistence of belief, but the way state secularisation restricted the very forums that could have normalised critical discussion of religion (universities, press, voluntary associations, and schools).

In the Turkish case, Niyazi Berkes in *The Development of Secularism in Turkey* (1964) frames early Republican secularism as a state-building project that reorganised public authority and education while leaving religion culturally durable. The implication developed in later historiography is that republican secularism did not cultivate a broad culture of critical religious reasoning; instead, it reorganised institutional religion and public visibility under strict political supervision. Erik Jan Zürcher in *Turkey: A Modern History* (first published 1993; later editions revised) similarly describes the breadth of Kemalist reforms and the one-party political environment that accompanied them.

The “state-management” dimension becomes central in work on Turkey’s religious governance. Ahmet T. Kuru in *Secularism and State Policies toward Religion: The United States, France, and Turkey* (2009) develops a framework that helps clarify why an assertively secular state may still not disenable long-term religious vitality: the state does not only exclude religion; it regulates and channels it. This point resonates with scholarship on the Presidency of Religious Affairs (*Diyanet*) as an institution that consolidated state authority over Sunni Islam rather than creating conditions for independent religious critique. The broader inference across this literature is that when religion is treated as an administrative object, something to supervise, rather than as a domain for open contestation, “deep” secularisation in value terms is less likely.

In Iran, comparable arguments appear in major accounts of the Pahlavi period and revolutionary mobilisation. Nikki R. Keddie in *Modern Iran: Roots and Results of Revolution* (2003) emphasises that rapid top-down modernisation did not translate into legitimacy or cultural realignment; political closure and uneven development shaped oppositional possibilities. Ervand Abrahamian in *Iran Between Two Revolutions* (1982) similarly highlights how modernisation can coexist with intensifying opposition where political incorporation is blocked and alternative moral authorities retain credibility.

Regarding the education system and secularisation, Janet Afary in her work *Foundations for Religious Reform in the First Pahlavi Era* (2015) argues that modern secular schooling aimed to produce loyal subjects rather than foster critical thinking. That argument is crucial, given that when the state curtails public religious authority, but simultaneously discourages critical inquiry, it can weaken traditional institutions without replacing them with durable habits of questioning and evaluation. In such contexts, religious authority may revive later through networks outside the state's preferred arenas.

Finally, comparative education scholarship that explicitly pairs Iran and Turkey by Reza Arjmand in *Inscription on Stone: Islam, State and Education in Iran and Turkey* (2008) treats education as a mechanism for reproducing dominant values under different state–religion settlements. Even though Arjmand's primary emphasis is not limited to the early Pahlavi and early Republican periods alone, the comparative structure strengthens the notion that education policy can function as ideological socialisation while leaving underlying value attachments intact, particularly when political conditions constrain critical exchange.

A second group of literature focuses more specifically on education systems, curricula, and textbooks to show that secularising reforms often replaced clerical control with state ideology, nationalism, developmentalism, and disciplined citizenship, rather than with critical engagement with religion as a historical, social, and philosophical phenomenon. For Turkey, detailed work on schooling in the early Republic shows that educational reform was extensive but tightly bounded by state doctrine. Barak A. Salmoni in *Ordered liberty and disciplined freedom: Turkish education and republican democracy 1923–50* (2004) treats early Republican schooling as a project of disciplined citizenship: education sought to shape the desired republican citizen and regulate civic morality. More directly on religion and schooling materials, Salmoni in *Islam in Turkish Pedagogic Attitudes and Education Materials: 1923–1950* (2000) examines how Islam was handled within educational discourse and materials during the formative decades of the Republic. This type of analysis matters because it addresses not only whether religion was removed institutionally, but how the state's education apparatus represented religion when it appeared, often as culture, morality, or a managed tradition rather than an arena for contested interpretation.

Textbook-based research deepens this point. Şefika Akile Zorlu Durukan in *The Religion of Muhammad: Early Turkish Republican Ideology and the Official View of Islam in 1930s History Textbooks* (2015) shows how official history education reframed Islam within a national narrative. Complementary scholarship on history textbooks, including Büşra Ersanlı's *History Textbooks*

as *Reflections of the Political Self: Turkey (1930s and 1990s) and Uzbekistan (1990s)* (2002), supports the broader idea that textbooks functioned as instruments of state self-construction, shaping what kinds of questions were legitimate.

For Iran, education historians have documented how Pahlavi schooling advanced national integration and state legitimacy. David Menashri in *Education and the Making of Modern Iran* (1992) details the building of modern education as part of state formation. Secular schooling did not prioritise critical thinking of religious authority or tradition.

Existing research on state-led modernisation focuses heavily on institutional reforms, centralisation of schooling, removal of clerical control, curriculum standardisation, and the introduction of secular subjects, but pays far less attention to whether these reforms created the intellectual conditions necessary for deeper cultural secularisation.

### **Theoretical Framework: Cultural Change, Religion, and Secularisation**

This study applies Ronald Inglehart and Christian Welzel's theory of value change to examine the relationship classical modernisation theory holds that socio-economic development leads to secularisation and, ultimately, democracy. Inglehart and Welzel's value-change theory refines this claim: modernisation as socio-economic development does not necessarily yield democracy or deep secularisation. Instead, outcomes are path dependent. While economic growth and education tend to produce predictable shifts in worldviews, a society's religious and historical legacies leave a lasting imprint. Hence, contrary to early modernisation theorists who expected religion and ethnic traditions to wither away, these identities have persisted and, in some contexts, regained salience (Inglehart and Welzel, 2010, p. 552).

Inglehart and Welzel argue that industrialisation can accompany a wide range of regimes, fascism, communism, theocracy, or democracy. What alters the probabilities is the transition to a post-industrial "knowledge" society, which brings socio-cultural changes that make democracy more likely. Knowledge economies rely on highly educated, articulate workers accustomed to independent judgement. As existential security rises, publics place greater emphasis on self-expression values—autonomy, voice, tolerance, which elevates demand for rights and accountability. Mass publics thus become both more inclined to want democracy and more capable of securing it (Inglehart and Welzel, 2010, pp. 552–553).

In this framework, secularisation means not the disappearance of religion but its shift from public authority to private belief. As existential security

increases, individuals are more likely to challenge clerical control, demand freedom of conscience, and adopt pluralistic norms. This transformation enables religion to evolve in ways that align with democratic and human rights values.

This theoretical framework helps explain why secularisation may remain incomplete or contested in countries undergoing modernisation. It is not the reforms themselves, but the underlying cultural shifts, that create the social foundation for enduring secularism and the redefinition of religion's role in society.

This research compares secularisation in Iran and Turkey – two cases that underwent modernisation in the 19<sup>th</sup> and 20<sup>th</sup> centuries.

### **Modernisation in Iran and Turkey: An Overview**

Reza Shah Pahlavi and Mustafa Kemal Atatürk rose to power during periods of significant turmoil in their respective countries, following the chaos of World War I and the collapse of empires. In Iran, the Qajar dynasty (1794–1925) had ruled since the late 18<sup>th</sup> century but faced mounting challenges, including foreign intervention, economic instability, and widespread dissatisfaction, especially after World War I. The 1919 Anglo-Iranian Agreement further weakened the Qajar regime and fuelled unrest (Abrahamian, 2008). In 1921, Reza Khan, a military officer, staged a coup; by 1925 he had deposed Ahmad Shah Qajar and established the Pahlavi dynasty. Reza Shah aimed to modernise and secularise Iran, centralising power and strengthening the state to break with the Qajar legacy; reforming education to curb clerical influence was central to this project (Matthee, 1993). Many intellectuals supported Reza Shah, arguing that only a strong, centralised state could drive comprehensive modernisation (Keddie, 2003).

Similarly, in Turkey, the end of World War I marked the collapse of the Ottoman Empire, which had suffered internal strife and territorial losses. Allied occupation of Istanbul and partition plans provoked a nationalist response (Zürcher, 2004). From 1919, a coalition of military officers, intellectuals, and local notables around Mustafa Kemal organised resistance under the Association for the Defence of the Rights of Anatolia and Rumelia (*Anadolu ve Rumeli Müdâfaa-i Hukuk Cemiyeti*), leading to the establishment of the Grand National Assembly in Ankara in 1920 (Zürcher, 2004). Mustafa Kemal's leadership in the War of Independence (1919–1923) culminated in the Republic of Turkey (1923) and the end of the Sultanate. He then launched radical reforms – Law No. 431 (1924) abolishing the Caliphate and the religious ministries, Law No. 430 (1924) unifying and secularising education, and Law No. 677 (1925) clos-

ing dervish lodges – to embed a secular legal-constitutional order and redefine national identity.

Both leaders sought to reshape their nations in response to crisis, moving away from traditional rule and promoting modernisation and secularisation as foundations for stability and strength. In Iran, these efforts included curbing the clergy's role in schooling and the courts, expanding state schools, and founding the University of Tehran; yet clerical authority persisted and often blunted reform. In Turkey, unifying education under the Ministry of Education produced concrete, historically specific changes: the madrasas (religious schools) were closed or converted into state schools, parallel religious boards were dissolved, and curricula, textbooks, and teacher training were centralised around secular civics, history, and science. Turkish became the medium of instruction, aided by the alphabet reform (1928), which accelerated literacy campaigns and standardisation. The university reform (1933) replaced the *Darülfünun* with Istanbul University and dissolved the theology faculty, signalling that religious instruction would no longer shape higher education. At the primary and secondary levels, religious courses disappeared for over a decade and *imam-hatip* training withered until limited reintroductions after 1949. Together, these measures achieved a state monopoly over schooling, sharply reduced clerical influence on curricula, and embedded a secular, centrally administered system – even as social religiosity endured outside the classroom (Karkazis, 2021).

### **Modernisation in Iran, 1923–1979: Secularisation Plans and Education: 1923–1979**

Under Reza Shah Pahlavi (r. 1925–1941) and later his son Mohammad Reza Shah Pahlavi, modernisation was a central goal of the state. Reza Shah Pahlavi (1878–1944) initiated the modernisation process by establishing a strong state in 1925, promoting economic development alongside profound social change. A key aspect of his agenda was the secularisation of the legal and educational systems, aimed at diminishing the power of the clergy, who had historically held considerable influence in governance.

As part of this effort, the Ministry of Justice underwent reform, and in 1927, new European-educated personnel replaced the clerical officials who had previously dominated the institution (Ameli, 2015, p. 141). Clerics were removed from their positions of authority, losing not only political influence but also a crucial source of revenue when the registration of legal documents related to property was transferred from religious (Sharia) to secular courts (Gods, 1991, p. 225).

The Civil Code drew heavily from European legal systems, particularly those of France and Belgium. While some areas of family law retained traditional Shi'a legal principles, reforms were introduced, such as the 1931 legislation that granted women the right to request a divorce under specific conditions. Additionally, new procedures for marriage and divorce registrations reduced the administrative control of the clerical establishment (Article 1041 of the Iranian Civil Code).

In 1936, Reza Shah banned the wearing of the hijab (veil) in public for women, which was a direct challenge to Islamic traditions. He also encouraged Western-style clothing for men, including banning the traditional clerical attire and mandating European-style suits and hats for civil servants and professionals.

Reza Shah's nationalism was anchored in a deep admiration for ancient Persia, but his secular outlook was shaped by modernist intellectuals who had been active in the Constitutional Revolution (*Mashruteh*), 1908, and hoped to establish a modern Iranian state. These thinkers, like Mohammad Ali Foroughi, Hasan Taqizadeh, Ali Akbar Davar, Abdolhossein Teymourdash influenced by the political and social transformations after the Constitutional Revolution and World War I, shifted away from democratic ideals toward a focus on modernisation and reform, guided by nationalist and secular ideologies. This ideological shift played a crucial role in the modernisation of the educational system during the first Pahlavi era (Rezaei, 2020). The government actively worked to reduce the influence of religion in education, which had been a fundamental part of the traditional education system of the country since the Safavid dynasty.

During the Safavid period (1501–1736), Shi'a clerics significantly strengthened their influence over Iran's traditional education system, which evolved to reflect an Islamic character. This system was divided into two main forms: *maktab* and *madraseh* (school). *Maktabs* provided elementary education for young children, teaching the Persian alphabet, basic arithmetic, and Quranic literacy. In contrast, *madrasahs* were intended for older students, focusing on religious studies and sciences through traditional methods rooted primarily in Islamic thought. Initially, clergymen managed *maktabs* within mosques, but over time, they transitioned to teaching in separate venues known as *makhtabkhaneh*. Under clerical control, the traditional education system became a vehicle for transmitting the Shi'a tradition to successive generations (Yousefvand, Hormoz, Begdeli, 2018, p. 751).

During the Qajar dynasty, despite increasing exposure to Western culture, the introduction of modern schools by Westernised elites and intellectuals like Haji-Mirza Hassan Roshdieh (1851–1944) did not diminish religion's

importance within the educational system. Resistance from Shi'a clerics against modern education persisted even after the Constitutional Revolution (1905–1911), which sought to reform and modernise the country. Additional challenges, including poor infrastructure and widespread poverty, hindered educational reforms. Data from 1918–1919 reveals that, over a century after the initial contact with Western education, there were only a few dozen elementary schools (serving 24,033 pupils) and a handful of secondary schools (with 2,392 students), most of which were privately operated (Menashri, 1992, p. 60).

Under Reza Shah Pahlavi's reign, the state began taking control of education by divesting *maktabs* of their traditional role. The government replaced these with elementary, secondary, and teacher-training schools, emphasising a Western-modelled curriculum over religious instruction. By 1940, there were 670 elementary schools for boys, with 114,116 pupils; 117 for girls, with 21,790 pupils; and 1,524 mixed schools, with 60,169 girls and 70,830 boys. Between 1936 and 1940, over 467,000 adults attended literacy classes (Wezarat-e Farhang, 1940). The new curriculum prioritised modern subjects like science and mathematics, relegating religious studies to the margins.

Between 1927 and 1931, a series of laws and regulations gave the Ministry of Education oversight of admission and graduation processes for students of religious sciences and the qualifications of instructors. The "Unified Clothing Law" mandated European-style clothing, exempting only those in recognised religious education. Students wishing to avoid military service or comply with the law had to pass exams administered by government-appointed committees. Subsequent years saw attempts to bring religious seminaries under government control (Shabani et al., 2018, p. 115).

From 1932, textbooks for madrasas were standardised, and a board of examiners from the Ministry of Education was tasked with testing students and teachers. The Ministry introduced a permanent academic curriculum for madrasas, which included non-religious subjects such as composition and history for middle levels. Subjects like Qur'anic exegesis and the lives of religious leaders were removed from higher levels. The government confined religious teachings in textbooks to moral and ritualistic topics, aligning with its secular agenda. It is noteworthy that, during this period, religious education institutions received less attention compared to state-led education reforms. However, given the population's deep-rooted religiosity and the clergy's influence, the curriculum still incorporated foundational religious content and selected Qur'anic verses. Reports and meeting minutes from the Supreme Council of Education discuss the inclusion of religious content in textbooks (Shabani et al., 2018, p. 115).

Starting in 1931, madrasas curricula were further restructured, reaching a peak in 1933. The Ministry of Education introduced a permanent curriculum for non-religious subjects, such as composition and history, at intermediate levels, while topics like “Biography of Great Figures of Religion” and “Tafsir (Quranic Exegesis)” were removed from higher levels. This campaign led to a decline in students attending traditional *maktabkhanehs* (religious schools), significantly reducing enrolment. By 1934, there were only 404 religious instructors and 2,100 students; by the 1936–1940 academic year, this had decreased to 124 teachers in such schools (Shabani et al., 2018, pp. 133–134).

However, studies of Pahlavi education describe extensive efforts to expand and centralise modern schooling, yet they also emphasise that curricular priorities were often oriented toward nation-building, developmentalism, and political loyalty, rather than cultivating critical debate about religion as a contested domain of knowledge (Matthee, 1993). Textbook-based work on the First Pahlavi era highlights how official educational materials promoted patriotism and attachment to state authority, indicating that the school system’s core pedagogical work focused on political and national formation rather than on developing interpretive and argumentative capacities for engaging religious authority (Shakoor Ghahari, Akbari, 2014). Where religion appeared, research suggests it was frequently framed through managed moral instruction or a controlled historical narrative, not through sustained, academically rigorous examination of Islamic traditions in ways likely to weaken clerical legitimacy in society (Afary, 2015; Karamipour and Shannon, 2021). Taken together, this scholarship supports an interpretation in which educational secularisation reduced clerical control over formal institutions while leaving broader religious socialisation largely intact, especially given uneven access to extended schooling and the continuing vitality of religious learning outside the state system (Menashri, 1992; Arjmand, 2008).

Reza Shah’s government, recognising the clergy’s enduring power, sought to modernise religious studies through the university system. In 1934, the Faculty of Theology was established at the University of Tehran, aiming to integrate religious studies within a secular academic framework. This initiative sought to promote a controlled, secularised version of Islam, aligning with the state’s nationalist and modernisation goals. However, the traditional power of the clergy could not be easily dismantled, and the limitation of religious studies to the Faculty of Theology highlighted the challenge of fully integrating modernised religious education into the broader academic system (Moniri, 2024).

Mohammad Reza Shah Pahlavi (1919–1980) continued the modernisation and secularisation of Iran’s education system, aligning curricula, teacher training, and university expansion with Western models while keeping schools

firmly under the Ministry of Education (Menashri, 1992; Abrahamian, 2008). His secular agenda progressively marginalised clerical influence in public life and schooling (Menashri, 1992; Sabahi, 2002). Yet his approach to the clergy was not as abrupt or uniformly coercive as his father's.

In the 1940s and the 1950s, especially during Ayatollah Borujerdi's (1875–1961) leadership over Shia clerics institutions, Shi'a clerical organisations maintained a significant degree of independence from state control. During this period, Ayatollah Borujerdi emerged as a central figure, leading the religious establishment and orchestrating systematic resistance to government-led reforms. His tenure marked a consolidation of clerical authority, which enabled the clergy to safeguard religious traditions and educational practices against rising secularisation efforts.

The crown struck a tacit *modus vivendi*: religion classes were introduced in state schools, licensed private Islamic schools such as *Alavi* operated, and the Qom *hawza* expanded – signalling early accommodation within a broadly secular framework (Karamipour and Shannon, 2021). After 1963 the balance tilted toward selective confrontation: university building and technocratic curricula accelerated (e.g., Aryamehr/Sharif; Pahlavi/Shiraz), civic socialisation became more tightly orchestrated (especially after the 1975 Rastakhiz turn), and family-law reforms moved personal-status matters into secular courts—further reducing clerical leverage around education and social policy (Abrahamian, 2008; Keddie, 2003). Even then, the regime did not abolish seminaries or ban religious instruction outright; instead, it ring-fenced clerical activity and kept it under surveillance and regulation while the state system became the dominant pathway for schooling and credentialling (Menashri, 1992; Abrahamian, 2008).

But the Shia clerics resistance to the Shah's reforms intensified during the “White Revolution,” a programme aimed at economic development, land reform, and educational advancements. Ayatollah Ruhollah Khomeini (1902–1989) opposed the plan from the outset. Shi'a clerical organisations, independent of state control, systematically resisted the reforms. The Islamic Education Society (*Jāme'eh-ye Ta'limat-e Eslāmi* – established in the 1940s), propagated religious modernism through a national network of private schools. In 1960s, cultural foundations used this model to create schools such as *Alavi*, *Kamāl*, and *Refāh* in Tehran. These schools combined religious teachings with standard curricula, nurturing a generation grounded in Islamic principles that later played significant roles in the Islamic Revolution of 1979 (Tebyan, 2014).

Despite the government attempts for modernisation of education, the domination of religious authorities over the interpretation of Islam tradition prevented new approaches from being presented publicly to the people. The

government aimed to curtail the power of Shia clerics by proposing an Islamic university to counteract seminaries such as *Feyziyeh*. Government documents described the plan to “limit the seminaries, which have become centres of anti-government agitation, and to strictly control such activities” (Tebyan, 2014). Opposition from scholars and public outcry stalled the initiative.

Meanwhile, the government was unable to prevent the spread of Islamic ideas: between 1954–1963, only 1.10% of published books were religious, but by 1972 this figure had risen to 25.82% (Azmoddeh, 2018).

Despite urban youth literacy rates reaching 85% by the mid-1970s, the overall adult illiteracy rate remained at approximately 63% for adult above 15 (Kishi, Azar-Chehr, 2019). These figures illustrate the limitations of state-led secularisation efforts, as deep-rooted religious traditions and clerical influence persisted. By 1979, Shia culture reasserted itself, uniting various ideological groups into the revolutionary movement that ultimately established the Islamic Republic.

### **Mustafa Kemal Atatürk: Secularisation Plans and Education**

Mustafa Kemal Atatürk (1881–1938), the first president of Turkey, established a new republic grounded in the principles of nationalism, secularism, and modernisation, with the aim of transforming the nation into a sovereign and progressive state.

Atatürk’s vision for Turkey centred on secularism. One of his earliest and most significant reforms was the abolition of the caliphate in 1924, which effectively separated religious authority from the state. This was followed by a series of legal reforms that replaced Islamic laws with secular civil and criminal codes, heavily influenced by European legal systems. These reforms laid the foundation for a legal framework that supported a secular state (Giunchi and Melis, 2024).

Cultural reforms were another cornerstone of Atatürk’s secularisation agenda, aimed at reducing religion’s public authority. The Hat Law (1925) banned the fez for men, and 1934 clothing regulations restricted the wearing of religious garments in public to authorised clergy (there was no blanket legal ban on women’s veiling). Sufi *tekkes* and *zaviyas* (religious lodges) were closed and dervish titles banned (1925); madrasas and sharia courts were dismantled (1924) as education and justice were unified under the state. The Civil Code (1926) replaced Islamic family law with civil marriage and inheritance. In the 1930s, the *adhan* (call to prayer) and parts of worship were rendered in Turkish, and Sunday became the weekly rest day (1935). Collectively, these measures curtailed clerical influence and recast public space in secular-national terms (Azak, 2008).

In modernisation of education, reform efforts were initiated by the Ottoman Empire. However, they were interrupted by World War I and the invasion of Anatolia, which necessitated the continuation of educational reforms under challenging conditions. Atatürk aimed to create a unified, secular national education system that would modernise the state.

His earliest reforms included the 1924 Law on the Unification of Education (*Tevhid-i Tedrisat Kanunu*), which abolished religious schools (*madrasas*) and integrated them into a secular national education system. This reform was intended to curtail the influence of religious authorities over education and align schools with the secular principles of the new Turkish Republic. Atatürk also introduced co-education, enabling boys and girls to study together, and stressed the importance of educating women.

One of the most transformative reforms was the adoption of a new Turkish alphabet based on the Latin script in 1928 (Ekici, 2023, p. 951). The primary motive for this reform was to modernise and Westernise Turkish society and culture. The government actively promoted language reform, replacing the Arabic script with the Roman alphabet as a step toward Europeanisation. By eliminating the Arabic script, which was deemed unsuitable for Turkish phonology, Atatürk irrevocably severed a major link to the nation's Islamic heritage and ties with the broader Islamic world (Yilmaz, 2011, p. 71).

Textbooks were extensively revised to emphasise nationalistic and secular values, reducing religious content and fostering a unified Turkish identity. The curriculum focused on instilling civic values and loyalty to the state, consistent with Atatürk's vision of shaping a new generation free from traditional, religious influences.

Primary education was made compulsory and free, significantly increasing literacy. Between 1923 and 1938, primary-school enrolment rose from 342,000 to 765,000. Middle-school enrolment grew from 6,000 to 74,000, and high-school enrolment also increased markedly. These figures underscore the reach of Atatürk's education reforms in building a more educated society (Karkazis, 2021, p. 4).

Universities were similarly restructured to prioritise secular subjects and ensure academic independence from religious institutions. Modern sciences and humanities were emphasised to cultivate an educated workforce capable of advancing Turkey's modernisation (Fındıklı, 2022).

These educational reforms fundamentally altered the role of religion in public life and education, creating the foundation for a secular state. By 1932, religious instruction was removed from the school curriculum (Karkazis, 2021, p. 6). However, the Hanafi school of jurisprudence remained unchanged.

Mustafa Kemal Atatürk's reforms profoundly redefined the relationship between the state and religion, especially regarding the role and influence of the Sunni clergy, aligned with the Hanafi school of jurisprudence, which was the primary Islamic tradition in Turkey (Golan-Nadir, 2022, pp. 4–7).

Historically, the Sunni clergy, particularly the Sheikh al-Islam, played an integral role in the Ottoman Empire. The Sheikh al-Islam served as the highest religious authority in the empire, responsible for interpreting Islamic law and issuing religious edicts. This position was appointed under the supervision of the Ottoman state and was closely aligned with the authority of the Caliph. Additionally, the Sheikh al-Islam held the power to appoint other clergy members in various cities, establishing a network of religious governance that linked local practices to the central authority (Nassaj and Bahrani, 2015, p. 9).

However, with the abolition of the Ottoman Sultanate in 1922 and the Caliphate in 1924, Atatürk effectively dismantled the existing religious authority structure. The removal of the Sheikh al-Islam created a significant void in the management and organisation of religious matters. No substitute institution or figure emerged to fill this gap, further weakening the Sunni clergy's position in society (Guida, 2008). It should be considered that financially, the Sunni clergy were heavily dependent on the state for their sustenance. During the Ottoman era, they received salaries and support from the state, enabling them to perform their religious duties. This financial dependence continued into the early years of the Republic, where state funding played a crucial role in maintaining the clergy's livelihoods. By controlling the financial resources allocated to religious institutions, the government exerted influence over the clergy's activities and decisions. This arrangement restricted the clergy's autonomy and aligned religious functions more closely with state objectives, marking a decisive shift in the role of religion within Turkish society (Nassaj and Bahrani, 2015, p. 9). In essence, religious affairs were controlled by different branches of the state to prevent the emergence of an autonomous religious sphere, as exemplified by the Ministry of Education's responsibilities.

In 1924, Atatürk established the Directorate of Religious Affairs (*Diyanet*) to oversee religious matters. This institution was designed to ensure that religion remained under state control and aligned with the principles of secularism. The historical formation of *Diyanet* illustrates that the Turkish conception of secularism (*laiklik*) represents the state's control of religion rather than a strict separation of state from religion. Frequently, *Diyanet* acted as the guardian of the existing regime, providing Islamic legitimacy to it. As a state apparatus, *Diyanet* securitised government policies and made them undebatable matters of high politics (Öztürk, 2019, p. 4).

Atatürk went further by closing religious orders and institutions, such as Sufi lodges (*tekkes*), in 1925. This weakened the influence of religious leaders over educational and social life, as religious orders often maintained their own schools and played significant roles in local communities (Fabbe, 2019, p. 85).

Atatürk also initiated the translation of the Qur'an into Turkish, making it more accessible to the general population. These measures were part of Atatürk's broader vision to modernise Turkey and reduce the influence of religion in public life, promoting a secular national identity (Wilson, 2009). However, there is no evidence to suggest that Atatürk planned to establish institutions or an Islamic university to transform traditional Islam into a modern and secular version. Instead, his reforms included closing religious schools (*madrasas*) and establishing a unified national education system that was fundamentally secular. Atatürk's emphasis was on promoting a secular education that aligned with his vision of modernisation rather than fostering a reformed Islamic education (Berkes, 1964).

Only a few specialised institutions were allowed to continue Islamic education, specifically for training religious leaders. Even these institutions operated under strict government oversight to ensure their curricula aligned with secular principles, contrasting sharply with the autonomy enjoyed by religious education under the Ottoman Empire. Atatürk's goal was not merely to diminish Islamic influence in public life but to ensure that Turkey's future leaders, including religious leaders, would be educated within a state-controlled, secular framework supporting his vision of a modern Turkish identity (Bellafiore, 2016, p. 7).

It can be argued that secularisation in education system operated mainly through institutional centralisation and state-directed civic narration, rather than through the systematic teaching of Islam as an academic field open to interpretive plurality and structured critique. Analyses of early Republican history textbooks show that Islam was commonly presented through a single authorised historical account aligned with nation-building aims, which limited opportunities for students to encounter competing interpretations or to practise reasoned debate about religious authority (Zorlu Durukan, 2015; Ersanlı, 2002). Studies of citizenship and civic-education materials similarly underline that the curriculum prioritised disciplined republican subject formation and loyalty to the state, displacing clerical influence in formal schooling without institutionalising sustained critical inquiry into religion (Salmoni, 2004). Scholarship on later decades also shows that religion did not disappear from the educational field but was reintroduced and channelled through state-recognised formats, including religious schooling pathways and regulated religious instruction, which could preserve religious socialisation while keeping critical engagement bounded (Pak, 2004; Özgür, 2012).

Thus, Atatürk's secularisation reforms led to the marginalisation of religious institutions primarily in urban areas, where new courts, schools, and state offices were concentrated and where the secular elite was socially and professionally rooted. The Hanafi school's emphasis on social peace and compromise may have eased the accommodation of these changes in cities, especially among educated middle classes who benefited from republican reforms. In rural regions, however, traditional social structures remained strong: religious authorities were central to everyday life, state institutions were weakly present, and people had little voice in shaping the reform agenda. Secularism was introduced from above, under strict military oversight and with limited public participation, creating a secular urban elite that struggled to connect with rural and religious constituencies. As a result, many villagers and conservative segments came to perceive secularism not as a shared democratic project but as an elitist imposition. They continued to follow Islamic norms, rely on local religious leaders, and keep their distance from state institutions. This pattern helped sustain higher levels of religiosity in rural areas and reinforced the contrast with the more secularised urban centres, laying a social basis for later political and cultural polarisation (Koberidze, 2024; Yapp, 1991).

Moreover, in 1940, Turkey's rural population constituted approximately 80% of the total population, amounting to around 17.8 million people (Statista, 2020). In 1960s, Turkey's adult literacy rate was approximately 40% and by end of 1970s, 62%, according to World Bank data (World Bank, 2025). It can be inferred that the rural literacy rate would have been significantly lower than the national average, as rural areas historically lag behind urban areas in education and literacy due to less access to schooling and other resources.

Despite Atatürk's secularisation policies, the transition to multi-party politics after 1946 allowed religious constituencies to re-enter the political arena. The Democrat Party's victory in 1950 marked a turning point: it relaxed strict Kemalist controls, including restoring the Arabic *adhan* and expanding religious activities, thereby opening space for religiously conservative voters to mobilise (Azak, 2008; Dokupil, 2002).

In this context, Necmettin Erbakan's *Millî Görüş* (National Outlook) movement emerged in the late 1960s as the main ideological platform for Turkish political Islam, combining a distinctly Turkish-national outlook with Sunni-Hanafi moral renewal, social justice and economic independence (Mammadov, 2020; Yang and Guo, 2015). On this basis, Erbakan founded the National Order Party (MNP) in 1970, followed by the National Salvation Party (MSP) in 1972, the first explicitly Islamist parties to gain parliamentary representation and participate in coalition governments during the 1970s (Mammadov 2020; Yavuz, 2003). These parties laid the organisational and

electoral groundwork for the post-1980 Welfare Party, which became the principal vehicle of political Islam in Turkey in the 1990s (Yılmaz 2012).

Islamist movements like *Millî Görüş*, often inspired by or aligned with the Muslim Brotherhood, began influencing political discourse and society, with growing connections to pan-Islamic movements, including those in Egypt. These groups, supported by networks like the *Naqshbandi* and other Sufi orders, helped integrate Islamist political ideologies, aligned with Hanafi jurisprudence, into broader political movements (Yavuz, 2003).

The rise of Recep Tayyip Erdoğan and his AKP further solidified this Islamist connection, which has continued till current time. In the 21<sup>st</sup> century, Turkey has also hosted conferences and meetings where Muslim Brotherhood figures and sympathisers have discussed questions of Islamic governance and political participation, reinforcing intellectual and political exchanges between Turkish Islamists and Brotherhood-oriented networks. (Anadolu Ajansı, 2022).

### **Comparative Analysis of Religion and Secularisation in Iran and Turkey**

Both the Pahlavi government in Iran and Atatürk's government in Turkey pursued assertive secularism, most visibly through restructuring education to curtail clerical authority and delimiting religion's role in public institutions. In theoretical terms, these reforms reflect functional differentiation, the separation of religious and state spheres, highlighted by secularisation theorists, but their mixed outcomes also show that legal-administrative change does not straight forwardly produce durable secular norms. Inglehart and Welzel's culture theory (often called the Human Development or Values Change theory) helps explain this gap. According to them, socio-economic modernisation is necessary but not sufficient for democracy unless it is accompanied by shifts in cultural values (Inglehart and Welzel, 2010, p. 33). Democratisation correlates with the rise of self-expression values, autonomy, tolerance, freedom of choice, and civic participation, which supply the normative foundation for pluralistic institutions (Inglehart and Welzel, 2010).

It can be argued that while modernisation typically reduces religious authority, this effect can be muted or reversed when there is little opportunity for critical engagement with religious ideas. Thus, state's policy in marginalising religion excluding religious discourse from public education can prevent the natural evolution of religious thought, preserving traditional beliefs in their original form.

In both Iran and Turkey, religious discourse was either strictly controlled or completely excluded from educational settings, hindering the development

of a modern understanding of religion. However, the dynamics in Iran were notably different due to the significant influence of the Shi'a clergy.

In Iran, the state faced a powerful and resistant Shia clergy that opposed secularisation, prompting the government to make more direct attempts to modernise religious studies. While secular schools advanced nationalism and modern science, religious education remained largely under clerical control and continued to transmit traditional Shia doctrine. Reza Shah, and later Mohammad Reza Shah, were unable to fully integrate or discipline the principal Shia institutions, which therefore retained significant autonomy and authority. As noted above, state efforts to build university-level programmes in Islamic studies did little to displace clerical influence. In this context, Shia tradition regenerated within seminaries and religious networks; combined with persistently high illiteracy rates in the mid-20<sup>th</sup> century, this preserved a reservoir of religious mobilisation that collided with state-led reforms and contributed to the revolutionary rupture.

In Turkey, Atatürk's policies centralised religious authority under state institutions rather than liberalising it. Following this, religious education in modern contexts was removed, and Islam was redefined within the framework of a secular-nationalist agenda.

After Atatürk's death in 1938, religious education was gradually reintroduced in state schools, but it was carefully regulated by the government. The curriculum promoted a controlled, standardised version of Islam that aligned with the secular state's values. This was different from a secular, non-denominational approach, which allows for a broader, more comparative study of religion. In modern societies, religious education served to expose students to the religious heritage of their society, and over time it broadened to cover a variety of world religions. Turkey's state-sanctioned religious education (when it returned) focused on Sunni Islam, with limited discussion of other religions or branches of Islam. This latent influence later contributed to the re-emergence of Islamist political movements in the 1980s, as traditional religious beliefs, preserved by families and communities, became influential in the public sphere once more. Consequence relegating religion to the private sphere.

In both Iran and Turkey, state policies sought to marginalise religion, especially by restricting its public expression and relocating it to private or tightly managed domains. Such containment insulated belief from revision, because doctrines shielded from open debate adapt more slowly to modern, pluralistic norms. The strategy modernised parts of the state apparatus, but it left popular religiosity largely intact. In Iran, the privatisation of religion enabled Shia institutions to retain traditional authority while limiting the

emergence of new, publicly contested interpretations, conditions that later facilitated the Islamic Revolution. In Turkey, the state incorporated Islam into a controlled framework aligned with secular nation-building; yet this administrative redefinition did not generate a substantively modernised theology, and traditional currents persisted, reappearing in the political arena from the 1980s onward. What was missing in both countries was a public discourse on Islam: broad, inclusive debate that engaged society and ended the clerical monopoly over religious interpretation.

## Conclusions

In conclusion, state-led secularisation by authoritarian governments pursued through modernisation did not produce lasting cultural change in how religion was viewed or placed in social life. In both Iran and Turkey, religion re-emerged in politics, revealing the limits of these policies. The core problem was that reforms were largely from above and embedded in restrictive law, without the wider value change that Inglehart links to sustained modernisation. Secular and modernised schooling did expand, but not broadly or deeply enough to reach the whole population, and policy changes in education often clashed with entrenched value structures.

Moreover, by marginalising religion and restricting religious discourse in public education, both states also unintentionally preserved traditional beliefs: insulated from critical inquiry, they did not adapt. They later returned with force when state control weakened. This amounted to a conservative modernisation—administrative and legal change without commensurate cultural transformation. The cases suggest that durable modernisation requires public engagement and space for critical religious debate in schools and the public sphere.

The outcomes diverged in form but not in logic. In Iran, shrinking public religious discourse under the Pahlavis created a vacuum in which Shia clerics reasserted authority, culminating in the 1979 Islamic Revolution. In Turkey, while a revolution did not occur, the absence of a public culture of religious pluralism enabled the resurgence of political Islam from the 1980s onwards. Overall, without broad-based shifts in values, especially towards self-expression and secular-rational orientations, top-down secularisation remains vulnerable to reversal.

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# Digital Transformation in Religious Governance: A Comparative Study of Buddhism in Vietnam and the Catholic Church in Poland

## Abstract

This paper examines the digital transformation of religious governance through a comparative study of the Catholic Church in Poland and the Buddhist Sangha in Vietnam. Both countries share a socialist legacy, yet their trajectories diverge significantly: Poland's Catholic Church has maintained autonomy and public influence, while Vietnam's Buddhist Sangha has been institutionalised under state supervision. Drawing on secondary sources, including legal documents, policy frameworks, and scholarship on digital religion, the paper analyses how digital technologies are integrated into religious management and public presence. Findings suggest that in Poland, digitalisation strengthens religious autonomy and fosters public dialogue, whereas in Vietnam, it enhances state capacity for centralised control while promoting Buddhism as a vehicle for cultural and ethical education. The study contributes to broader discussions on the interplay between religion, politics, and digital society in post-totalitarian contexts.

**Keywords:** digital religion, religious governance, Catholic Church in Poland, Buddhism in Vietnam, post-totalitarianism.

## I. Introduction

The relationship between religion and the state has long been one of the central themes of the social sciences and humanities. In post-totalitarian and post-authoritarian societies, where highly centralised political regimes once exerted strict control over spiritual life, this issue becomes particularly sensitive and complex (Casanova, 1994, p. 39; Taylor, 2007, p. 513). Moreover, in the context of globalisation and especially digital transformation, this relationship is being reshaped in multiple dimensions, ranging from institutional governance and identity formation to the ways in which religions manifest themselves in the public sphere and on digital platforms (Campbell and Golan, 2017, p. 1212; Campbell and Evolvi, 2020, p. 121).

This paper selects two representative cases for comparative study: the Catholic Church in Poland and the Buddhist Sangha in Vietnam. These cases differ significantly in historical background, political models, and religious

traditions, yet they share the common experience of having gone through socialist regimes and now facing the challenges and opportunities of digital transformation.

In Poland, the Catholic Church has been not only a religious institution but also a major socio-political force closely tied to national identity, particularly during the struggle against the communist regime (Weigel, 1992, p. 112; Zubrzycki, 2006, p. 46). After 1989, the Church entered into a dialogical relationship with the democratic state, while also confronting new challenges of secularization and digitalization (Zuk, 2012, p. 56).

In contrast, in Vietnam, Buddhism has a history stretching back millennia. Yet under the socialist regime after 1975, the state sought to unify all Buddhist organizations into a single structure – the Vietnam Buddhist Sangha – in order to maintain centralised control (Nguyễn, 2016, p. 45). In the digital transformation era, the state has simultaneously employed digital technologies to enhance surveillance and governance, while allowing Buddhism to utilize online platforms as tools for cultural and moral dissemination (Thích, 2010, p. 101; Phạm, 2009, p. 38).

The central question of this study is: How has digital transformation affected the relationship between state and religion in the contexts of Vietnam and Poland, and how do the models of religious governance in each country reflect these differences?

The study employs qualitative analysis of secondary sources, including legal documents, state policies on religious management, academic reports, and scholarship on digital religion. Based on this, a comparative qualitative approach is applied to highlight both similarities and divergences between the two cases.

This research contributes in three main ways: (1) it enriches theoretical debates on state–religion relations in post-totalitarian and digital contexts; (2) it provides empirical evidence on religious governance in Vietnam and Poland; and (3) it offers recommendations for managing religion in the digital age for countries with comparable socio-political contexts.

## **II. Theoretical Framework and Methodology**

### **1. State-Religion Relations in Post-Totalitarian Contexts**

According to Casanova, in modern societies religion is not merely “privatised” but is also capable of re-entering the public sphere as a socio-political force (Casanova, 1994, p. 42). This is particularly true in post-totalitarian societies, where religion historically acted as a counterforce against totalitarian regimes-

distinct from merely authoritarian systems—thereby securing a distinctive position in democratisation processes.

Poland represents a paradigmatic case: the Catholic Church has often been described as a form of “civil religion,” intertwined with national identity and endowed with exceptional social authority (Zubrzycki, 2006, p. 54). In contrast, Vietnam exemplifies a model of “religion under surveillance,” where the socialist state seeks to regulate and orient religious activities through legal and institutional mechanisms (Nguyễn, 2016, p. 47).

These models reflect broader structural differences in political systems: multi-party democracy in Poland fosters dialogue and social contestation, whereas the one-party system in Vietnam constrains religion’s presence in the public sphere.

## **2. Digital Transformation and Religion: Digital Religion**

Over the past two decades, scholarship on digital religion has demonstrated that religion is not only present in online spaces but is also transformed in its very practices and meanings through technology (Helland, 2005, p. 206; Campbell and Golan, 2017, p. 1218). Campbell and Evolvi emphasize that digital technology is not merely a medium but constitutes an environment in which new religious experiences are generated—ranging from “online religion” (religion practiced in digital spaces) to “religion online” (the digital representation of existing traditions) (Campbell and Evolvi, 2020, p. 124).

This dual dynamic presents a twofold challenge for religious governance: On the one hand, the state may employ digital technologies to register believers, enhance surveillance, and strengthen administrative control. On the other hand, religious organisations may use digital platforms to expand their influence, disseminate teachings, and form new communities that transcend physical boundaries.

For example, the Catholic Church in Poland has introduced official websites, livestreamed masses, and mobile applications to engage with parishioners (Zuk, 2012, p. 56). Meanwhile, Buddhism in Vietnam has relied heavily on YouTube, Facebook, and TikTok to spread teachings, while also collaborating with the state in public campaigns on environmental protection and social welfare (Thích, 2010, p. 105).

In this article, the digitalisation of religion is approached as a multi-dimensional process encompassing (1) administrative digitalisation, such as online registration and data management; (2) communicative digitalisation, including livestreamed rituals, sermons, and religious media platforms; and (3) interactive digitalisation, where social media enable feedback, community-

building, and public debate. Rather than assuming that all digital tools produce identical effects, this framework emphasizes how different forms of digitalisation generate distinct patterns of authority, participation, and control in each national context.

### **3. Research Methodology**

This article applies qualitative analysis of secondary materials, including: Legal documents and religious policies in Vietnam and Poland (such as the Law on Belief and Religion, 2016, in Vietnam, and the Concordat of 1993 in Poland). Scholarly research on state–religion relations and digital religion (Casanova, 1994, p. 43; Campbell and Golan, 2017, pp. 1220–1225; Davie, 2000, p. 20). Reports and statistical data concerning the application of digital technologies in religious governance in both countries.

Based on these sources, a qualitative comparative method is employed to highlight the divergences in how digital transformation is integrated into religious governance in Vietnam and Poland.

This study does not aim to provide an exhaustive account of all religious actors or digital practices in either country. Rather, it adopts a comparative analytical lens to examine how dominant religious institutions are embedded in distinct political regimes and how digital transformation interacts with existing state–religion arrangements. The selected cases thus serve as illustrative models rather than comprehensive representations.

## **III. Historical and Political Backgrounds**

### **1. Poland: Catholicism from Repression to Dialogue**

During the communist era (1945–1989), Poland was one of the Eastern European countries where religion, particularly Catholicism, played a central role in shaping national identity and sustaining resistance. Unlike many other socialist states where secularisation accelerated, Poland maintained a high level of Catholic adherence, with religious life closely tied to community bonds (Casanova, 1994, pp. 43–44).

The communist state, modelled on the Soviet Union, adopted strict policies of control over the Catholic Church: nationalising Church property, restricting clerical training, censoring pastoral activities, and blocking the Church’s participation in the public sphere (Byrnes, 1996, p. xx). Yet repression did not eradicate religion; instead, it strengthened the Church’s symbolic role as a moral refuge and guardian of national identity, in opposition to communist ideology (Weigel, 1992, p. 115).

A turning point came in 1978 when Cardinal Karol Wojtyła, Archbishop of Kraków, was elected Pope John Paul II. His first pilgrimage to Poland in 1979 drew millions of participants and created a “spiritual earthquake” that inspired national unity and opposition to the regime (Garton Ash, 1984, p. 65). John Paul II transformed Catholicism into a unifying national symbol while affirming the Church’s political role in democratisation.

The *Solidarność* (Solidarity) movement, established in 1980 as an independent trade union, soon evolved into a mass social movement against the communist system. The Catholic Church offered moral support, secret meeting spaces, communication resources, and ethical legitimacy to the movement (Porter-Szűcs, 2011, p. 76). This Church–Solidarity alliance showcased religion as a political and social force.

When communism collapsed in 1989, the Church entered the post-totalitarian period with institutional strength. In 1993, the Concordat between Poland and the Vatican granted the Catholic Church special legal status, including the right to teach religion in public schools, recognition of theological faculties, and state support for social and humanitarian activities (Zuk, 2012, p. xx). Poland thus became a Catholic “exception” in Eastern Europe: religion retained a central place in public life rather than declining.

In the digital era, the Polish Church has actively used online tools: livestreaming masses, developing mobile applications, and using social media to reach younger audiences (Campbell and Tsuria, 2021, p. 39). However, it also faces challenges: rising secularisation, feminist and LGBT+ movements, and declining trust in traditional authority (Borowik, 2010, p. 32).

## **2. Vietnam: Buddhism and the Post-Revolutionary Model of Control**

Buddhism entered Vietnam in the 2nd century CE and played a major role under dynasties such as the Lý and Trần, when it served as both state religion and ethical-philosophical foundation (Nguyễn Lang, 1994, p. 128). From the 15<sup>th</sup> century onward, however, Confucianism gained dominance, and Buddhism shifted toward a popular religious role.

In the 20<sup>th</sup> century, Buddhism re-emerged as a socio-political force. In South Vietnam before 1975, Buddhist protests-especially against the Ngô Đình Diệm regime in 1963, demonstrated its political capacity. The self-immolation of Thích Quảng Đức in Saigon became a global symbol of Buddhist resistance (Kurtz, 1996, p. 73).

After reunification in 1975, the socialist state regarded religion as both “a spiritual need of part of the population” and a domain requiring control to ensure political stability (Vietnam Fatherland Front, 1981, p. 132). In 1981,

the state merged existing Buddhist groups into the Vietnam Buddhist Sangha (VBS), the sole legal Buddhist body under state oversight (Nguyễn, 2016, p. 47).

Following Đổi Mới reforms in 1986, religious policy softened, but regulation remained. Key documents include the *Ordinance on Belief and Religion* (2004) and the *Law on Belief and Religion* (2016), which require registration of religious activities under the Government Committee for Religious Affairs (Nguyễn, 2016, p. 48). This model has been described as “cooperative control”: religions are acknowledged and even encouraged to contribute to social welfare, education, or environmental protection, yet always within the ideological framework of the Party-State (Phạm, 2009, p. 85).

In the digital transformation context, Vietnam has introduced technologies for religious management: digitising believer registries, using IT in event supervision, and monitoring online discourse (Government Committee for Religious Affairs, 2020, p. 57). At the same time, Buddhism has embraced digital media: temples offer online retreats, Dharma lectures on YouTube, meditation apps, and active presence on Facebook and TikTok to connect with youth (Thích, 2010, p. 107).

Unlike in Poland, however, Vietnamese Buddhism cannot openly challenge state policy. Its digital presence is encouraged mainly in non-political areas such as ethics, cultural education, or environmental protection. Thus, the state promotes Buddhism’s digital role as a “soft tool” of social governance, while retaining strict control over its scope.

### 3. Comparing Poland and Vietnam

The most fundamental difference lies in religion’s role in national identity. In Poland, Catholicism became a marker of resistance and was intertwined with national identity, whereas in Vietnam Buddhism has coexisted with Confucianism, Daoism, and socialism. After 1989, Catholicism had the institutional leverage to negotiate with a democratic state; in contrast, Vietnamese Buddhism was bureaucratized and placed under state control.

Another distinction is the post-totalitarian political system. Poland’s multi-party democracy and strong civil society allow for religious dialogue and contestation. Vietnam’s one-party state restricts religion to a supportive role within the “socialist orientation”, without the right to policy critique.

Finally, globalisation differentiates the two cases. Polish Catholicism is part of a global network led by the Vatican, limiting direct state interference due to international scrutiny. Vietnamese Buddhism, by contrast, is localised and lacks a global institutional centre, enabling tighter domestic control (Casanova, 1994, p. 45; Nguyễn, 2016, p. 85).

## **IV. Comparative Analysis of State-Religion Models in the Digital Transformation Context**

### **1. Legal Frameworks and Degrees of Autonomy in Digital Governance**

In Poland, after 1989, the legal framework for religion was restructured toward democratisation. The Concordat signed in 1993 between Poland and the Vatican affirmed the autonomy of the Catholic Church (Weigel, 1992, p. 117; Casanova, 1994, p. 52). In the digital era, this autonomy enables the Church to independently develop online platforms for governance and communication, such as digital parish databases, online registration of sacraments, or livestreamed masses via YouTube (Zuk, 2012, p. 83). The state's role is largely limited to technical support and ensuring data privacy, without intervening in religious content.

By contrast, in Vietnam the legal framework is designed to maintain state supervision over religion. The 2016 Law on Belief and Religion requires all religious activities – from clerical appointments to the construction of places of worship – to be registered with state authorities (Nguyễn, 2016, p. 58). In digital transformation, this is reflected in the digitisation of administrative procedures: applications for organising festivals, training monks and nuns, or registering religious activities are gradually integrated into national e-government portals (Government Committee for Religious Affairs, 2021, p. 61). The autonomy of the Vietnam Buddhist Sangha (VBS) is therefore limited: even the creation of websites or media channels requires prior approval from state authorities.

Thus, while digitalization of religious management is present in both countries, in Poland it reflects organisational autonomy, whereas in Vietnam it reflects centralised administrative governance.

### **2. Social Position and Influence in the Digital Sphere**

In Poland, the Catholic Church continues to occupy a central position in public life, and digital transformation has extended this presence into the online public sphere. Catholic media outlets such as Radio Maryja and TV Trwam function not merely as channels of religious communication but as influential actors within Poland's broader media and political landscape (Zubrzycki, 2006, p. 81; Campbell and Evolvi, 2020, p. 126). Through websites, livestreamed masses, and social media platforms, Catholic discourse becomes embedded in public debates, allowing religious narratives to circulate beyond ecclesiastical boundaries and enter mainstream political discussion. In this sense, Catholicism in Poland exemplifies a form of "digital public religion," where soft power is exercised through sustained visibility, agenda-setting, and discursive framing in digital spaces.

While precise audience metrics and systematic data on digital reach are not always publicly accessible, the influence of Catholic digital platforms becomes particularly apparent during moments of political and moral controversy, such as debates surrounding abortion legislation. During these periods, religious content circulates intensively online, intersecting with offline mobilization in the form of street protests, petitions, and parliamentary debates. Digital campaigns and social media engagement do not operate in isolation but form part of a wider ecology of political action, in which religious institutions, political actors, and civil society interact. This suggests that digital Catholicism in Poland exerts influence not primarily through quantifiable audience size alone, but through its capacity to sustain discursive authority and facilitate collective mobilization across the online-offline divide.

In Vietnam, by contrast, the Vietnam Buddhist Sangha (VBS) occupies a markedly different social position. Rather than acting as a political interlocutor, the VBS primarily functions as a moral and cultural authority embedded within a framework of state-guided religious governance. Digital transformation has nonetheless expanded the visibility of Buddhism through online sermons on YouTube, Facebook pages, and meditation applications. These digital initiatives predominantly emphasize ethical cultivation, spiritual well-being, and social responsibility, often in close alignment with state-sponsored campaigns such as “Buddhism and Green Environment” or “Buddhism for Social Welfare” (Thích, 2010, p. 116).

Although comprehensive statistical data on audience reach and demographic composition are rarely disclosed, platform-based indicators offer insights into the social resonance of digital Buddhism in Vietnam. Prominent Buddhist YouTube channels and livestreamed Dharma talks frequently attract hundreds of thousands, and occasionally millions, of views. Patterns of interaction – such as recurring participation in livestreams, comment activity, and content sharing – suggest engagement across diverse age groups and geographic regions. These forms of engagement indicate that digital Buddhism operates as a mass-mediated religious practice with significant social reach. However, unlike the Polish case, this visibility does not translate into autonomous political influence. Instead, the digital presence of Buddhism remains institutionally constrained, reinforcing its role as a source of ethical guidance and cultural continuity rather than a platform for independent political critique. Taken together, these contrasting cases demonstrate that digital technologies do not produce uniform outcomes in terms of religious influence. In Poland, digitalisation tends to amplify religion’s political and social authority by integrating religious discourse into pluralistic public debate. In Vietnam, digitalisation strengthens Buddhism’s cultural and ethical functions within a framework of

state supervision, highlighting how the social impact of “digital religion” is shaped less by technology itself than by underlying political and institutional contexts.

### **3. Models of Interaction: Digital Dialogue vs. Digital Control**

Poland illustrates what can be analytically described as a model of “digital interactive autonomy.” The state and the Catholic Church engage in dialogue through both traditional and digital channels. Public debates on issues such as abortion, same-sex marriage, or sex education often unfold on television, online news, and social media, with participation from both political leaders and Church representatives (Davie, 2000, p. 27; Zuk, 2012, p. 88). Despite tensions, digital platforms are treated as legitimate arenas for social dialogue.

Vietnam, on the other hand, demonstrates a model of “digital guided control.” Digital technologies are primarily deployed for monitoring and supervision. Large Buddhist festivals are managed through electronic registration systems, surveillance cameras, and event-security protocols linked to administrative databases (Nguyễn, 2016, p. 56). Online Buddhist activities—such as livestreamed sermons or meditation apps—are encouraged if they promote “national cultural values” and “socialist spiritual life,” but restricted if deemed “spontaneous” or outside state-approved frameworks.

This comparison reveals that Poland uses digitalisation as a platform for multidimensional dialogue, whereas Vietnam deploys it as a tool of administrative guidance and control.

## **V. Conclusions and Implications**

A comparison between Poland and Vietnam in the governance of religion in the post-totalitarian context highlights fundamental differences in state-religion relations and reveals how each country deploys digital transformation to consolidate its system of social governance. Both nations share the legacy of socialist rule, yet they have followed divergent trajectories.

In Poland, the collapse of communism in 1989 opened the path toward democratisation and enabled the Catholic Church to assert its public role as both a spiritual authority and a socio-political partner. In the digital era, Poland’s “public religion” (Casanova, 1994, p. 54) has been reinforced through digital platforms. Catholic media such as Radio Maryja and TV Trwam provide new arenas for public debate, shaping social opinion and influencing policymaking (Davie, 2000, p. 35; Zubrzycki, 2006, p. 85). Nevertheless, these outlets are also subject to widespread criticism, particularly from centrist, liberal, and leftist publics, who view them as partisan voices aligned with nationalist-right

politics and the Law and Justice Party. The Episcopate and certain bishops have similarly been accused of political one-sidedness, raising concerns about the blurred boundaries between religion and party politics. At the same time, alternative forms of “open Catholicism” have flourished in Poland’s digital sphere, represented by pluralist media such as *Tygodnik Powszechny* and *Kontakt*. This coexistence of divergent Catholic voices illustrates how digitalization amplifies both the authority and the internal fragmentation of religion in Poland’s public sphere, reflecting broader tensions between religion, democracy, and pluralism in contemporary Polish society. The autonomy of the Church, already guaranteed by the Concordat, has thus extended into the digital realm, enabling Polish Catholicism to preserve national identity while also engaging in contested debates within a global digital society. While digitalisation multiplies voices and contestation within Polish Catholicism, it simultaneously exposes the limits of consensus in a pluralist democratic environment.

By contrast, Vietnam has retained a model of “guided legal control.” The creation of the Vietnam Buddhist Sangha in 1981 and subsequent legal frameworks – 1986 reforms, the 2004 Ordinance, and the 2016 Law on Belief and Religion – have institutionalised centralized state management of Buddhism (Nguyễn, 2016, p. 56). In the digital era, the state has promoted the digitization of religious administration: online procedures for festivals, digitized databases of religious events, and monitoring through digital platforms. While this enhances efficiency and transparency, it significantly restricts autonomy and limits Buddhism’s potential as a voice of social critique. Digital Buddhist activities mainly revolve around ethical education, social welfare, and cultural preservation, rather than independent political engagement (Phạm, 2009, p. 74).

From this comparison, three major conclusions emerge:

First, digital transformation does not alter the underlying model of state-religion relations, but rather reshapes and reinforces it within a new technological framework. In Poland, digitalisation extends autonomy and dialogue; in Vietnam, it refines mechanisms of state control.

Second, the degree of religious autonomy is directly linked to political institutions. Poland’s multi-party democracy enables the Catholic Church to act as an equal interlocutor in political debate, while Vietnam’s one-party system positions religion as a supportive arm of the state. In both cases, digital technology serves as a tool that consolidates pre-existing political logics.

Third, digitalization opens new spaces for religion to exercise and restructure soft power. In Poland, Catholicism has become a form of “digital public religion” (Campbell and Tsuria, 2021, p. 42), while in Vietnam, Buddhism functions as part of a “digitised cultural religion,” aligned with state goals of cultural preservation, social ethics, and nation branding.

This study demonstrates that analysing religion in the digital age cannot be separated from institutional and political contexts. Digital transformation is not a neutral technological process, but a socio-political development shaped by history, culture, and power structures. Poland and Vietnam exemplify how “religious digitalisation” unfolds unevenly across national contexts.

### **Practical implications**

For Vietnam: digital tools in religious governance should move from a focus on surveillance to fostering dialogue with religious organisations. This would reduce administrative burdens while enabling religious communities to contribute more fully to issues such as climate change, social justice, and ethical education.

For Poland: the key challenge is balancing the communicative power of the Church’s digital media with democratic secular principles, avoiding excessive influence of Catholicism over public policy—particularly in contested areas such as women’s rights and same-sex marriage.

For comparative research: expanding the analysis to other cases (e.g., China, South Korea, or Hungary) could provide a more comprehensive understanding of how digital technology reshapes state–religion relations globally.

### **Future outlook**

The rapid development of artificial intelligence (AI), big data, and virtual/augmented reality (VR/AR) will raise new questions: Can AI serve as a medium for preaching or spiritual guidance? Can virtual religious festivals be recognised as legitimate faith events? Will digitalisation transform the identities of traditional religious communities? These are critical avenues for further research on the future of religion in the digital age.

In conclusion, the comparison between Poland and Vietnam in the context of digital transformation reveals two distinct models: Poland’s democratic “digital dialogue” and Vietnam’s centralised “digital control.” Both demonstrate how digital technology does not erase but rather reshapes state-religion relations, while simultaneously opening new arenas for religion to assert and negotiate its role in contemporary society.

## **VI. Case Studies of Digital Applications**

This section complements the comparative analysis presented above by providing concrete case studies of digital applications in religious governance. Rather than introducing new arguments, these cases empirically illustrate how

abstract models of “digital autonomy” and “digital guided control” operate in practice in Poland and Vietnam.

### **1. Vietnam: Digital Platforms in Buddhist Governance**

The Vietnamese state has increasingly adopted digital platforms to regulate, monitor, and support the activities of religious organisations, especially the Vietnam Buddhist Sangha (Giáo hội Phật giáo Việt Nam, VBS). Since the enactment of the *Law on Belief and Religion* (2016), religious organisations are required to register their activities with the state, and this process has been gradually digitalised through e-government portals managed by the Government Committee for Religious Affairs (Ban Tôn giáo Chính phủ) (Nguyen, 2016, p. 59).

One notable development is the introduction of online registration systems for Buddhist festivals and ceremonies. For example, large-scale events such as the Vesak Celebrations, which often draw tens of thousands of participants, now require digital approval and coordination between local Buddhist chapters and the authorities. Through online systems, the state can track expected attendance, monitor finances, and ensure compliance with safety and political regulations (Taylor, 2007, p. 518).

In addition, the VBS itself has embraced digital transformation in its communication and outreach. The official website of the Sangha (phatgiao.org.vn) and affiliated YouTube channels such as “Giáo hội Phật giáo Việt Nam Online” have become important tools to disseminate sermons, promote state-aligned interpretations of Buddhist values, and attract younger audiences. The use of livestreaming during the COVID-19 pandemic further highlighted how Buddhist rituals could be shifted into the digital sphere while still under the oversight of state institutions (Thich, 2010, p. 117).

Yet, the digitalisation of Buddhism in Vietnam primarily reflects a state-centered model of governance. Digital platforms function not only as tools of religious outreach but also as mechanisms of surveillance and control. For instance, online sermons or events that deviate from official teachings can be flagged and sanctioned by authorities (Nguyen, 2016, p. 60). This demonstrates how digital transformation reinforces the cooperative - control model, where Buddhism is recognised as part of cultural heritage but tightly circumscribed in its political role.

### **2. Poland: Catholic Church and Digital Autonomy**

In contrast, the Catholic Church in Poland operates in a post-communist democratic environment, where digital technologies have been harnessed more autonomously. Since the early 2000s, Catholic institutions have established

numerous online platforms for education, religious practice, and public debate. A prominent example is *ekai.pl*, the Catholic Information Agency's portal, which provides daily news, live-streamed masses, and archives of pastoral letters. This platform allows the Church to communicate directly with both believers and the wider public, often influencing national debates on moral and political issues (Casanova, 1994, p. 62).

Digital platforms in Poland also extend into education. Catholic universities such as the John Paul II Catholic University of Lublin (KUL) and Cardinal Stefan Wyszyński University in Warsaw provide online theology courses, blending academic training with digital accessibility. Such initiatives ensure that religious knowledge remains publicly visible and institutionally supported, in contrast with contexts where theology may be marginalized (Weigel, 1992, p. 106).

During the COVID-19 pandemic, the Catholic Church in Poland significantly expanded its livestreaming of liturgies, enabling believers to participate virtually. While this shift mirrored global trends, in Poland it was framed not as state regulation but as a pastoral response to social needs. Bishops encouraged parishes to develop their own digital solutions, creating a decentralised but coordinated ecosystem of online Catholic practice (Davie, 2000, p. 38).

Importantly, the Polish Church also engages in digital advocacy. Online campaigns regarding abortion legislation or family values show how digital media has amplified the Church's political influence. While critics argue that this deepens social polarisation, it nonetheless illustrates the autonomy with which the Church employs digital tools to shape public life. Unlike in Vietnam, the state has little capacity or legitimacy to impose direct control on the Church's online presence.

### **3. Comparative Insights**

A comparison of these two cases highlights both convergences and divergences in how digital transformation affects religious governance. On the one hand, both Vietnam and Poland have witnessed the expansion of religious activities into digital platforms. Livestreamed rituals, online sermons, and digital religious media have become crucial for maintaining engagement, particularly among younger demographics and during moments of crisis such as the pandemic. In both contexts, religious digitalisation has also facilitated the management of large-scale events and the dissemination of teachings beyond physical boundaries.

On the other hand, the key difference lies in the locus of control. In Vietnam, digital platforms are integrated into the state's regulatory apparatus,

emphasizing surveillance, registration, and political alignment. Buddhism's online presence is permitted but constantly supervised, reinforcing its role as a moral-cultural agent rather than a political voice. In Poland, the Catholic Church enjoys considerable autonomy, using digital tools for evangelisation, education, and political advocacy without state interference. Here, digitalisation strengthens religion's role in civil society rather than subordinating it to state structures.

These contrasts also reflect broader institutional and historical legacies. In Vietnam, the socialist one-party system situates digital transformation within a framework of guided control, where technology enhances the state's ability to manage social organisations. In Poland, the post-1989 democratic transition institutionalized the Church as a powerful actor in public life, and digital platforms extend that influence into the twenty-first century.

From a theoretical perspective, Vietnam exemplifies José Casanova's notion of "privatised religion under surveillance," where religion remains culturally significant but politically constrained (Casanova, 1994, p. 63). Poland, by contrast, represents "public religion" in the digital age, where religious institutions articulate moral claims in the public sphere and negotiate directly with political actors (Davie, 2000, p. 69).

#### 4. Implications

The juxtaposition of Vietnam and Poland suggests that digital transformation is not a neutral process, but one embedded in national political regimes and historical trajectories. In authoritarian or semi-authoritarian systems, digital tools tend to reinforce state control over religion, ensuring compliance while providing limited cultural space. In democratic settings, the same tools enable religious institutions to broaden their influence and contest state policies.

This comparative insight is particularly relevant in the era of rapid global digitalization. It raises questions about whether digital religion will lead to greater freedom and pluralism, or whether it will reinforce existing power structures. The Vietnamese and Polish cases demonstrate that the answer depends less on technology itself than on the political and institutional environment in which it is deployed.

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# Reading the Belt and Road Initiative Through Slovak Eyes: A Study of Its Initial Portrayal in Slovak Media

## Abstract

This paper explores the image of China's Belt and Road Initiative within the Slovak context based on the media coverage in three periodicals: Pravda, SME, and Dennik N. In order to investigate the transformation of its representation in Slovak media during an early phase of the initiative's implementation, which was marked by initial expectations and generally positive attitude toward it, the textual material gathered for this preliminary study comprises articles published from 2013 to 2016. The purpose of this study is three-fold: to explore the extent of reporting on the initiative in the Slovak periodicals analysed, to identify the key topics of reference related to the initiative, and to advance our understanding of presenting the initiative to the general public in the form of newspaper articles.

**Keywords:** Belt and Road Initiative, China, media discourse, sentiment, Slovakia.

## 1. Introduction

The Belt and Road Initiative (BRI), first launched in 2013 as the One Belt, One Road, was created with the aim of establishing new trade routes and strengthening cooperation between China and numerous countries worldwide. In addition to countries forming the corridor along the historical Silk Road, this initiative also includes partner countries throughout Europe, as well as in Africa and Southeast Asia under the umbrella of the Silk Road Economic Belt and the 21<sup>st</sup> Century Maritime Silk Road.

The promotion of the BRI, which was based on *five areas of cooperation* (policy coordination, infrastructure connectivity, unimpeded trade, financial integration, and strengthened people-to-people ties), has been fostered through numerous international forums in China and countries sympathising with the initiative (cf. China Law Info, 2015; Xi 2013a, 2013b). Nevertheless, due to the indefinite implementation strategies of the cooperation frameworks and projects, the prevalence of the initially positive responses of numerous European countries has been replaced by a more cautious attitude, and perceptions of the BRI has started to diversify (Arduino, 2016; Chen et al., 2019; Grieger, 2016; Jiang, 2022).

Since the launch of China's BRI in 2013, Slovakia's perceptions of the project has reflected a complex interplay between pragmatic economic considerations, political orientations, and broader public ambivalence. It has evolved from cautious optimism to pragmatic ambivalence, reflecting shifts in domestic politics, EU–China relations, and changing global geopolitics. Initially, between 2013 and 2016, Slovak policymakers viewed the BRI primarily through an economic lens, emphasizing its potential to enhance connectivity, trade, and foreign investment (Ministry of Economy of the Slovak Republic, 2015). Given the former inclusion of Slovakia in the cooperation format introduced in 2012 as 16+1 with the objective to intensify the cooperation of China with CEE (Central and Eastern Europe) countries, it is not surprising that Slovakia also expressed its interest in joining the BRI shortly after its official launch, and was one of the first countries that signed the memorandum of understanding in 2015. During this early phase, government discourse was generally optimistic, highlighting opportunities for infrastructure development, logistics, and participation in the railway network connecting Europe with China (cf. Kironská and Turcsány, 2017; Kelemen et al., 2020; Šimalčík 2021). Nevertheless, project outcomes remained rather limited – based on the data provided by Eurostat, EU Direct Investment, an overview for our timeframe, 2013–2016 – Slovakia received a relatively lower amount of Chinese direct investment compared with its neighboring countries such as Hungary and the Czech Republic (Jaklič and Svetličič, 2019).

As a result of intensified contact between Europe and China, the BRI aroused great interest among the general public as well as in academic circles. Moreover, various media on national and international levels have devoted considerable attention to the initiative and its impact not only from the global perspective, but also considering each country's specific circumstances. Therefore, the BRI can be perceived to a great extent an inseparable part of media discourse on international cooperation with China for almost a decade after its official launch (Ge, 2021; Li, 2018; Zhang, 2023).

The main aim of this paper is to examine the transformation of the BRI's representation in Slovak media during the early stage of its implementation, a period marked by heightened expectations and a generally positive attitudes toward it. The analysis is based on a corpus of articles published between 2013 and 2016 in the selected periodicals aiming to capture the initial phase of media reporting on activities and narratives related to its promotion in Slovakia. By mapping this early media discourse, the study seeks to establish a baseline for understanding subsequent developments and shifts in Slovak media representation of the BRI marked by a gradual change in attitude from positive to more cautious and critical, which can be further explored through the lens of

Slovakian foreign policy and its ties with China. The present dataset represents a basis for designing a specialised *ViewBRI Corpus* as a part of a research project which is still in progress (2024–2026), and it will comprise articles published from 2013 to 2024 to allow for a more detailed and comprehensive analysis of the media outlets.

## 2. Role of Media Discourse Analysis

Cultural studies understands culture not as a fixed or static set of practices but as a dynamic field of signification in which meanings are produced, contested, and negotiated. In this light, media discourse analysis is an important research tool in this field because it provides a critical framework for examining how meaning, ideology, and power circulate through media texts. Since media is not a neutral transmitter of information, but an active agent in shaping collective understandings of the world, discourse analysis enables scholars to uncover how linguistic and semiotic choices frame issues, define public opinion, and legitimise particular ideologies and viewpoints (cf. Fairclough, 1995a; Foucault, 1972; Hall, 1997). In this sense, media discourse analysis examines how institutional structures, audience practices, and historical conditions shape and are shaped by discursive formations, and reveals how these texts articulate and reproduce different ideologies. This contextual sensitivity allows scholars to investigate the connections between culture, ideology, and political economy, reinforcing the cultural studies commitment to understanding media as both a site of domination and a potential space for democratic participation (cf. Hall, 1973; Laclau and Mouffe, 1985; Wodak and Meyer, 2016). Furthermore, media discourse analysis serves as a key methodological tool for understanding representation and identity formation. Cultural studies emphasizes that identities – such as nation, class, or gender – are discursively constructed. Media texts, varying from advertising to social media, contribute to the normalisation of certain identities, while excluding others. At the same time these identical spaces can also foster resistance. By foregrounding the relationship between discourse, ideology, and identity, media discourse analysis equips scholars with the methodological tools to decode the politics embedded in everyday media communication. In doing so, it advances the central aim of cultural studies: to reveal the cultural mechanisms through which societies construct, contest, and transform their realities (Fairclough, 1992; Hall, 1997; Kellner, 1995).

Earlier research focused on the perception of the BRI in the media has been predominantly concerned with analysis of media discourse in Western countries (Arifon et al., 2019; Miao, 2021; Herrero and Xu, 2019; Zhang,

2021), and a study of the BRI's image as presented by Slovak media is still quite limited in breadth and scope (cf. Kironská and Turcsány, 2017; Matura, 2018). Considering that Slovakia belongs to those countries that have declared an interest in the further development of cooperation ties with China from the early phase of the initiative's implementation, this paper aims to further explore the discourse on the BRI in our chosen Slovak periodicals. Following Slovakia's interest in cooperation with China, it is to be expected that the leading digital periodicals should also have paid attention to the initiative, its prospects and promotional activities. Taking the articles from *Pravda*, *SME*, and *Dennik N* as examples, this research provides an introductory analysis of the BRI's image in these Slovak periodicals based on the qualitative and quantitative evidence retrieved from the collected textual data.

### 3. Methodology

The selection of these periodicals was primarily driven by the reporting coverage on the BRI aiming to achieve a comparable number of articles among these periodicals based on a preliminary search query of leading digital periodicals by using the keywords *Jedno pásmo, jedna cesta/Jeden pás jedna cesta* (Belt and Road Initiative, *Hodvábna cesta* (Silk Road), and *Nová Hodvábna cesta* (New Silk Road). In addition, considering a recent public opinion survey on media brand trust conducted by Reuters Institute for the Study of Journalism, the selected periodicals reached a comparable public trust display as follows: *Pravda* 42%, *SME* 41%, and *Dennik N* 36% (Reuters Institute for the Study of Journalism, 2024). The political orientation and ideological stances of the selected periodicals were not the predominant determining feature for their selection and inclusion in the dataset.

The purpose of this study is to advance our understanding of presenting the initiative to the general public in the form of newspaper articles by:

- investigating the frequency of articles published on the BRI from 2013 to 2016;
- determining their share among the studied periodicals;
- identifying the key subjects linked to the initiative based on the predominant topic referred to in each article;
- analysing the periodical's attitude based on the collocational patterns when referring to the BRI.

The methodological framework incorporates the well-grounded approaches of corpus linguistics and discourse analysis with close reading to establish

the connections between the BRI and the predominant topics that have been discussed, as well as to explore the overall attitude of these periodicals towards the initiative. Corpus linguistics was chosen to facilitate the management and interpretation of the data supported by quantitative evidence (McEnery and Hardie, 2012; Meyer, 2002). In order to prepare the foundations of the specialised *ViewBRI Corpus*, and to test the feasibility of the proposed methodology, the collection of the pilot dataset was carried out based on the following criteria:

- periodical title: SME, *Dennik N*, and *Pravda*;
- publication year: 2013-2016;
- language: only articles written in Slovak were considered;
- use of at least one of the following keywords: *Jedno pásmo, jedna cesta/ Jeden pás jedna cesta* (Belt and Road Initiative), *Hodvábna cesta* (Silk Road), *Nová Hodvábna cesta* (New Silk Road).

Each text file was stored and encoded with a set of metadata: year, newspaper name, article headline, and key subject (based on the close-reading analysis) to enable filtering across these variables and facilitate the interdisciplinary use of the gathered data for future research. Prior to the creation of the *ViewBRI Corpus* planned in the later stage of research, the information comprising the above-mentioned variables was stored and managed in an Excel file. The preliminary data-processing workflow and the categorisation of variables represent an important part of the preparatory work prior to the corpus creation and design of the query options. Given the nature of the present research, the variables were used to facilitate the quantitative data evaluation, as well as complement the qualitative analysis of the media discourse on the BRI.

With regard to the qualitative study of the textual material, discourse analysis that examines language and its function in communication was chosen (Brown and Yule, 1983; Johnstone 2018; Widdowson, 2007), to enable the study of the language in use when referring to the BRI from a broader perspective. Since discourse analysis takes into consideration context, cultural and social framework, and goes beyond the formal aspects of linguistics by combining the study of discourse, vocabulary, grammatical patterns, and semantics, it allows one to take into account assumptions related to the communicative event and the possible impact of the text with regard to its interpretation and reader perception (Brown and Yule, 1983; Cook, 1989; Fairclough, 1995b).

Lastly, a close reading of the textual material was carried out to identify the basic communication content, to examine the overall text organisation, and label the linguistic elements used for depicting the BRI and the key subjects

of interest with regard to the initiative so that the subject examined was done so in context. This data-driven approach, which includes both quantitative and qualitative exploration of the textual material, aims to provide a comprehensive characterisation of the BRI's image presented by the Slovak periodicals, as shown in the following section.

#### 4. Research Data and Findings

The pilot dataset comprises 51 articles in total and the preliminary research findings are displayed from the perspective of the frequency of articles published from 2013 to 2016, their share among the analysed periodicals in total and across the years based on the year of publication. This section also includes data that display the diversity of the key subjects linked to the presentation of the BRI based on the predominant topic in each article. The section concludes with the presentation of the perception of the BRI determined by the collocational patterns with the keywords referring to the BRI based on the general attitude applied to its presentation supplemented by mapping its development across the years and according to the newspaper type.

As Figure 1 shows, the majority of articles (53%, 27 articles) were published in 2016, which marks the last year of the studied period of the pilot dataset. The second highest number of articles was published in 2015 (37%, 19 articles) followed by comparably lower distribution rates in 2014 (8%, 4 articles) and 2013 (2%, 1 article). Despite the official announcement of the BRI in 2013 (China Law Info, 2015; Xi 2013a), the pilot dataset shows that the Slovak periodicals started to report on the initiative only later, when the activities for its promotion became more evident and they were often related to the 16+1 initiative launched in CEE region (cf. Chen et al., 2019; Kironská and Turcsány 2017).

Considering the division of the articles among the three periodicals published from 2013 to 2016 shown in Figure 2, the predominant number of articles was found in *SME* (55%, 28 articles) followed by *Pravda* (35%, 18 articles) and *Dennik N* (10%, 5 articles).

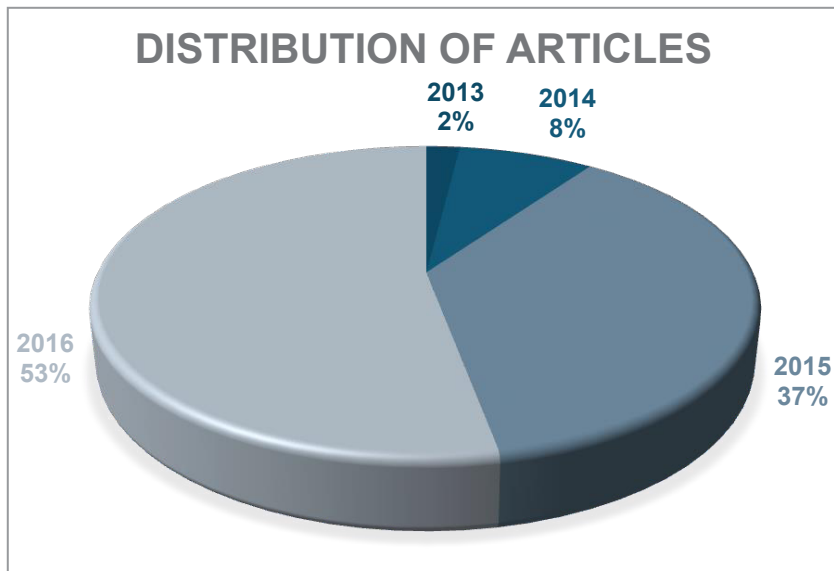


Fig. 1. Overall distribution of articles (2013–2016)

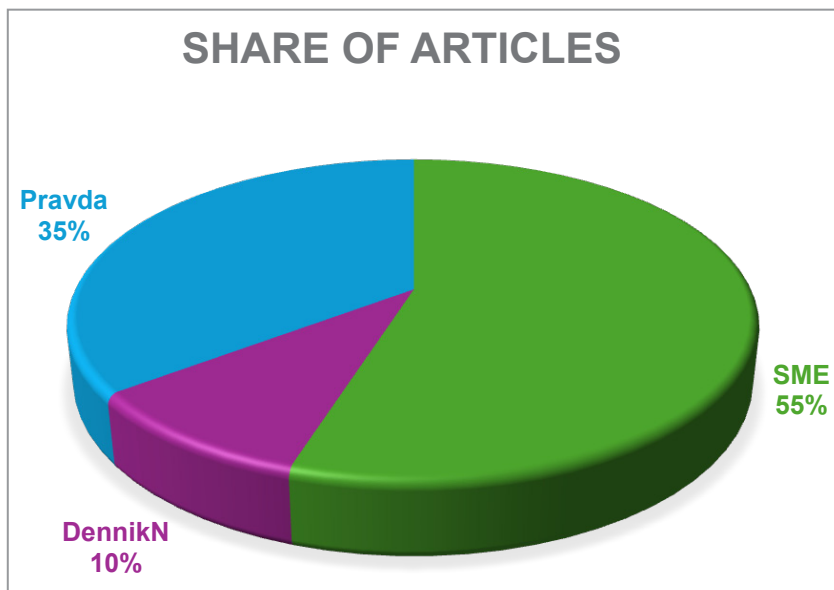
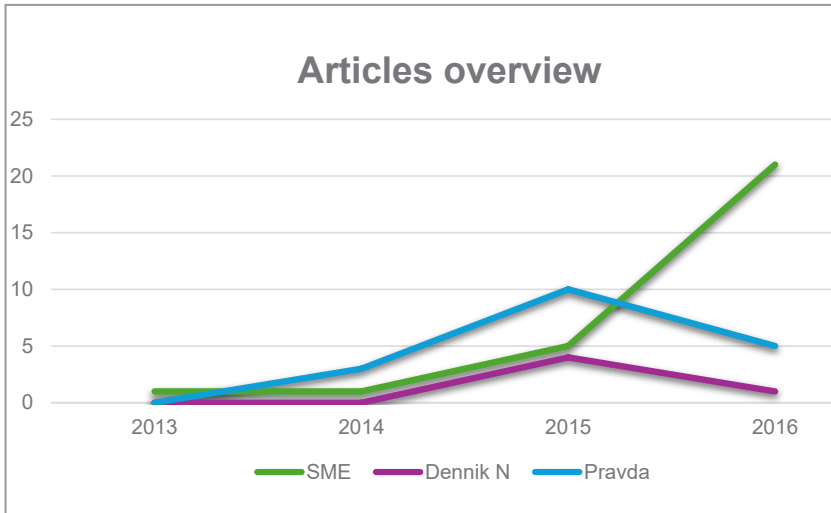


Fig. 2. Share of articles in the periodicals (2013–2016)

Figure 3 shows a more comprehensive overview of the article publication rates and share among the periodicals studied, not only based on the year of publication, but also displaying the newspaper type. As shown in the figure below, the only newspaper with a constantly rising tendency in article publication across the years is *SME*. Despite the low number of published articles in the first three years of the period studied (1 article in 2013 and 2014 respectively, and 5 articles in 2015), it represents the most active periodical in 2016, with 21 articles published in total.

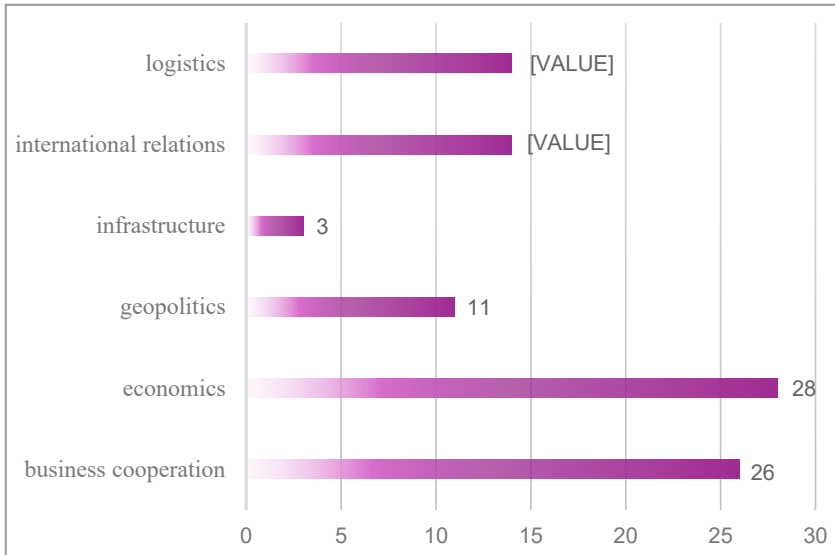


**Fig. 3.** Articles overview (2013–2016)

On the other hand, *Dennik N* and *Pravda* share to a certain extent a similar curve of article distribution (see Fig. 3), although, their publication record displays certain differences as well. The similarity in article distribution discussing the BRI is found in 2013, when both periodicals, *Pravda* and *Dennik N*, did not publish any articles. Regarding the subsequent years and the publication record in *Pravda*, 3 articles are found in 2014, and the peak of the publication record can be found in 2015, with 10 articles, followed by a decline in 2016, with 5 articles. The least active publication record can be found in *Dennik N*, which published the BRI-themed articles first in 2015 (4 articles), with the peak number of articles followed by a decline in 2016 (1 article).

Figure 4 displays the categorisation of key subjects linked to the presentation of the BRI in all articles, without taking into consideration the newspaper type and the year of publication, to provide a general overview of the topics linked to the presentation of the initiative. The most common topics are economics

and business cooperation, followed by international relations and logistics. On the other hand, less frequent key subjects used for the presentation of the BRI's image are geopolitics and infrastructure.



**Fig. 4.** Key subjects related to the BRI's presentation

As shown in Figure 5, the overall attitude towards the initiative was examined based on the following scale: positive, neutral to positive, neutral, neutral to negative, and negative. The predominant categories are marked by neutral (35%, 18 articles) and neutral to positive (27%, 14 articles) attitudes followed by positive attitude (18%, 9 articles). An identical number of articles was found in the categories of neutral to negative and negative attitudes (10%, 5 articles respectively). Based on the figure below, the media discourse on the BRI in the introductory phase can be perceived as rather neutral without a strong position against or in favour of the initiative.

In order to gain a better understanding of attitudinal development across the years, Figure 6 displays the attitude categories based on the year of publication. Because of the limited number of articles published in 2013 and 2014, the attitudes were also less diversified and revolved around a neutral perception of the BRI instead of showing a stronger standpoint. In 2013, there was only one short article reporting on the initiative in a neutral manner, whereas in 2014 there were two neutral articles, one article reporting in a neutral to positive manner, and one article formulated in a negative way.

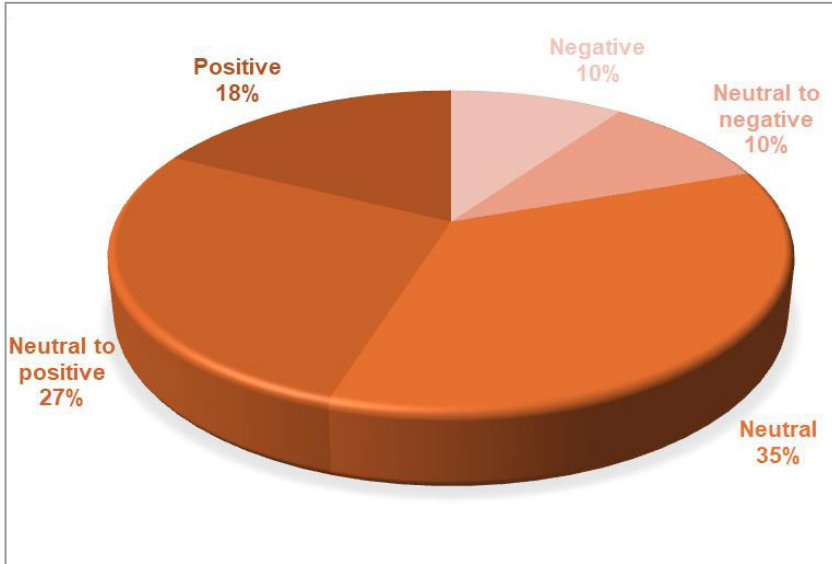


Fig.5. Attitude towards the BRI – overall (2013–2016)

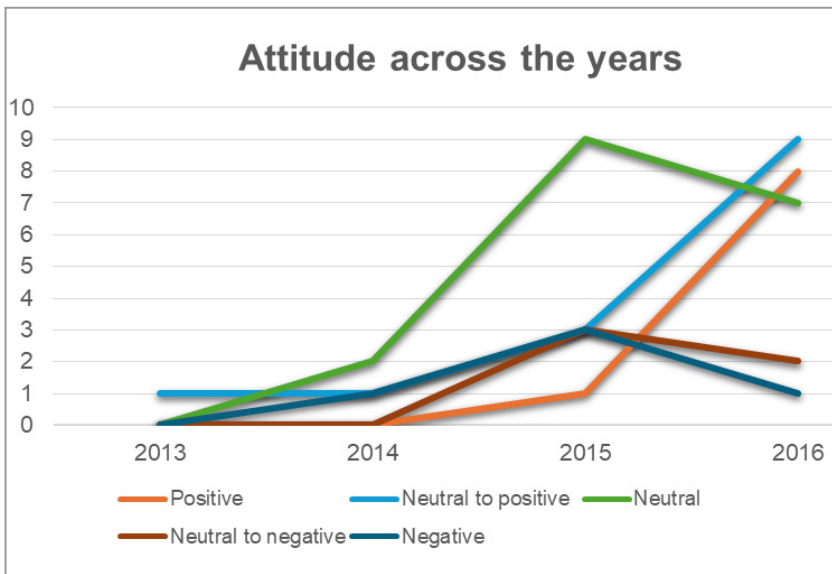
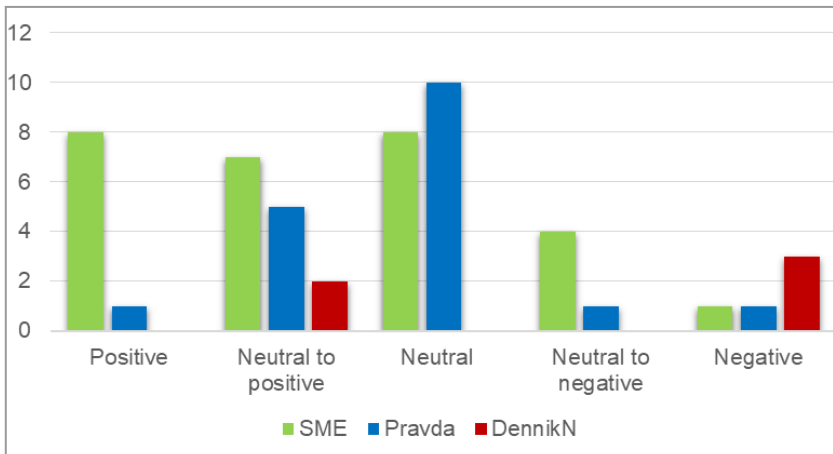


Fig. 6 Attitude towards the BRI across the years

The periodicals became more active in 2015 and there were nine neutral articles followed by three articles in the categories of negative, neutral to negative attitudes. There was also one article reporting on the initiative in a positive manner. Since the highest number of articles was published in 2016, it displays the second most diversified publication year in relation to the attitude categories. The majority of articles presented the BRI in a neutral to positive manner (nine articles) followed by positive (eight articles) and neutral attitudes (seven articles). The lowest number of articles was assigned to neutral to negative category (two articles) and negative category (one article).



**Fig. 7** Attitude towards the BRI

The last figure displays the division of the articles based on the periodical type and attitude categories (see Fig. 7). Considering *SME* as the newspaper with the highest number of articles on the BRI, its attitude mainly revolved around the neutral and positive categories (eight articles respectively) followed by neutral to positive attitude (seven articles), neutral to negative attitude (four articles), and negative attitude (one article). *Pravda* also preferred to depict the initiative in a neutral to positive manner. The highest number of articles was found in the neutral category (10 articles) followed by neutral to positive attitude (five articles). An equal number of articles was assigned to positive, neutral to negative, and negative categories (one article respectively). The least diversified attitudes were shown in the articles published by *Dennik N*. It is also important to note that this newspaper published the lowest number of articles during the period studied and there were only two categories of attitudes: negative (three articles) and neutral to positive (two articles).

Considering the qualitative analysis of the textual data gathered in the corpus, the identified discourse strands can be categorised as follows:

- BRI as modernisation and progress
- BRI as an economic necessity and benefit
- BRI as a geopolitical tool
- Slovakia as an insignificant actor

As for the first category, the BRI is framed as a technologically advanced and efficient way of modernising global trade. The articles depict the initiative as rejuvenated and modernised revival of historical trade routes by making use of metaphors of replacement and progress, such as the substitution of traditional caravans with rail transport (e.g. *camels were replaced by trains*) and the repetitive emphasis of the advancement of the railway gateways. The articles emphasize innovation, interactivity, and efficiency; therefore China can be perceived as a strategic technological and economic partner. On the other hand, political or strategic considerations are omitted, which contributes to a depoliticised understanding of China's infrastructural initiative. As a result, the initiative can be perceived as a natural extension of globalisation rather than a contested geopolitical project.

Regarding the second category, the BRI as economic necessity and benefit, the discourse revolves around the topic of global economic need, which also aligns with the predominance of key subject categories displayed in Fig. 4. The BRI is framed as a pragmatic response to the structural demands of the international trade. The articles depict the BRI as a project that seeks to connect China with the economies of East, South and Central Asia and Europe through the expansion of railways, highways, energy and optical data networks in combination with maritime routes aimed at region of East Asia. The texts foreground to a great extent logistical efficiency, cost and time reduction with regard to creating new transport corridors. The dominance of technocratic language – focusing on containers, transport routes, and commodity flows – constructs trade infrastructure as politically neutral and economically rational. This strand reinforces the perception of China as a functional provider of global connectivity while marginalising questions of power or China's long-term strategic influence spanning continents.

Although the decisive key subject in the third category is also related to the international cooperation and trade, a different viewpoint can be found with regard to global trade initiatives. The BRI is not solely framed as a neutral economic project, and expansive infrastructure plans within the initiative are interpreted as instruments of power and tools for controlling routes, such as *China buying a gateway to Europe in Greece*. This discourse challenges earlier

depoliticised representations by foregrounding the economic dominance of China, thereby exposing the power relations underlying global economic integration.

The last category relates to articles discussing the position of Slovakia as an insignificant actor despite the continuous confirmation of Slovak government officials in deepening the cooperation with China. A shift in the attitude toward a more critical stance of Slovak periodicals is found in multiple articles published in 2016, which indicates that the BRI is being implemented without any significant participation by Slovakia, as indicated by *Slovakia is not China's gateway, China does not perceive Slovakia as a key partner, or China already has two Silk Roads, and they both bypass Slovakia*.

The preliminary analysis revealed that the BRI is framed as a discursively varied concept. A close reading shows that rather than a single dominant narrative, multiple discursive strands coexist. While early coverage tends to present the BRI a depoliticised and innovative initiative supported by economic rationality, articles published toward the end of the studied timeframe also discuss the possible shortcomings of its implementation with regard to the international trade and geopolitical landscape. This shift demonstrates how media discourse evolves in response to national as well as broader international developments.

## 5. Discussion and Conclusion

As shown by the preliminary research findings, this paper provides a basic understanding of the BRI's representation in the chosen Slovak periodicals by combining traditional methods of linguistic research with well-grounded approaches from corpus linguistics and discourse analysis to enhance the process of data management, evaluation, and analysis. The data acquisition and annotation were focused on gathering the publicly available articles published by *Pravda*, *SME*, and *Dennik N* in digital form based on the envisaged search criteria, followed by encoding the metadata for each text file. The pilot dataset was compiled to verify the availability of the textual material retrieved from the chosen periodicals and to test the feasibility of the annotation scheme as well as the selection of variables to determine the extent of the future functionalities, which will be provided in the full version of the *ViewBRI Corpus*. The filtering options were also relevant for the present stage of research since the data analysis not only included the temporal aspect but also the article publication coverage across the periodicals, the key subjects, and attitudes towards the BRI.

Concerning the *year* variable, the highest number of published articles in total was found in 2016, one year after Slovakia officially expressed its interest in joining the initiative. The lowest number of articles was found in 2013 and 2014, which indicates that despite the international launch of the BRI, reporting on the BRI was rather rare. The majority of the articles were published in *SME* followed by *Pravda* and *Dennik N*. A more detailed analysis is required to explore the characteristics of the BRI's image presented by the individual periodicals in addition to the temporal aspect depicted by the article overview, based on the publication year and periodical type. The second variable presented in this paper was the key subject category used for addressing the initiative. The most common areas of the newspapers' interest were linked to economics and cooperation followed by international relations and logistics, mainly repetitive references to the railway connection. The last two categories that were less frequent were geopolitics and infrastructure. The last variable included in the preliminary research was *attitude*. The articles were assigned to one of the five categories on a scale from positive to negative attitudes expressed in relation to the initiative. Due to the relatively limited number of articles published from 2013 to 2016, it is not possible to generalise the overall attitude of the Slovak periodicals towards the initiative. However, preliminary analysis showed the predominance of neutral to positive attitudes instead of strong opposition with regard to the evolving cooperation ties with China in Slovakia.

The qualitative analysis identified four dominant discourse strands in the analysed periodicals: the BRI as modernisation and progress, as economic necessity and benefit, as a geopolitical instrument, and Slovakia as an insignificant actor. The former two categories framed the initiative in predominantly depoliticised terms, emphasizing efficiency, innovation, and global connectivity to depict China as a functional economic partner whereas latter two categories comprise more critical interpretations that highlighted China's economic dominance and the geopolitical implications of its infrastructure investments in various regions, as well as questioning Slovakia's position within the initiative. To summarise, these strands reflect a gradual shift from initial optimism toward a more cautious and critical media discourse surrounding the portrayal of the BRI in the studied periodicals.

By reading the BRI through Slovak eyes as shaped and filtered by media discourse, this paper has shed light on the local perception of the BRI and opens up discussion for further exploration of the role of media in shaping public understanding of national and international cooperation initiatives such as the BRI, and in mediating the position of Slovakia within the evolving relations among China, European Union, and CEE countries as its closest neighbours.

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## Doomed to Loneliness: The Image of the Bengali Woman in the Films of Rituparno Ghosh

### Abstract

The aim of this paper is to present and analyse the image of Indian women presented in Rituparno Ghosh's films. The analysis is focused especially on the cultural background of women's depiction in India. Ghosh's movies are a kind of confrontation with traditional images of Indian women. In spite of the gynophobic tendencies of Indian society, Rituparno Ghosh analyses the psyche of woman and creates a depiction very different from the Sanskrit heroine's attitude and the sex appeal of Bollywood stars. So, the question is: what are the women of Rituparno Ghosh like? The paper presents four models of femininity we can find in the director's movies: Woman as Body/Object, as Mother, and Widow.

**Keywords:** Rituparno Ghosh, cinema of Bengal, India, Indian parallel cinema, woman in Indian cinema.

Indian culture, understood here primarily as the dominant, mainstream tradition shaped by Sanskritic and Brahmanical heritage, is fundamentally patriarchal in structure. Although regional variations and alternative cultural configurations exist, the normative frameworks that have historically exerted the greatest influence on social organisation, religious ideology, and symbolic representation have been largely male-centric. Within this predominantly patriarchal paradigm, femininity is approached in an ambivalent manner: women are simultaneously idealised, venerated, and symbolically exalted, while at the same time subjected to social control, normative regulation, and structural subordination. On the one hand, femininity is identified with *shakti* – female energy and divine creative ability, on the other hand, it is responsible for the lowly position of women in Hindu society. In the Hindu tradition, the determinant of a woman's social role is her biology. The ability to give life puts her on an equal footing with the Great Goddess – the mother of the universe. On the other hand, menstruation – seen as a monthly uncleanness – excludes a woman from most religious rites. This dualism in the approach to women is perceived by some researchers as gynophobia, i.e. fear of women and femininity (Goldman, 1993, pp. 374–401). Woman was considered subordinate to man and simultaneously necessary for him, predominantly as a wife, but not only.

For this paper, the cultural area of South Asia is treated as Bengal - understood as a historical and cultural region currently divided between India and Bangladesh. Bengal – until the Partition of British India – largely constituted a cultural whole; however, it is impossible to ignore the fact that differences between the cultures of Bengali Hindus and Muslims did exist. In the present study, the point of reference is the heritage and culture of Bengali Hindus, since they are both the creators and the primary recipients of the texts and films discussed. In Bengali culture – i.e. Bengali Hindu culture in this case – as Barbara Grabowska claims, two images of a woman have dominated in literature: the ideal wife and the ideal mistress (Grabowska, 2001, p. 247). Each of them has a different social role to play. A mistress is primarily supposed to satisfy the senses – she has to be beautiful, passionate and infinitely in love with her man. An ideal wife is the opposite of a lover – her duty is total obedience and devotion to her husband, caring for his health and well-being, caring for the house, and giving birth to sons who will extend the family. A wife's virtue can be a husband's strength and protection from dangers. The image of the ideal female lover from literature, both Bengali and Sanskrit, plays a crucial role in cinema.

Bollywood cinema developed as a result of the blending of Western theatrical and film influences on the one hand and indigenous performance traditions and aesthetic theories on the other (Dissanayake, Gokulsing 2004). In the context of this paper, it is worth emphasizing that Bollywood cinema is largely a continuation of the tradition of Indian theatre. It is based primarily on the same aesthetic concept, described around 300 BC by the sage Bharata in *Natyashastra* (Grabowska, Śliwczyńska, Walter, 1999, p. 301). Commercial cinema has adopted many conventions and cultural patterns present in classical and semi-classical theatre forms. Moreover, since its beginnings, Indian cinema (also artistic) has been largely based on literature, and the first productions were screen adaptations of classic texts, including *Mahabharata*. As Krzysztof Maria Byrski claims:

Intense melodrama, tear jerking partings and reunions, the hero or heroine (or both) saved from a dreadful fate at the last minute, the conventional exaggerated over-acting (...), the regular interpolation of songs and dances (...) – all these features show a striking continuity with the ancient Indian dramatic tradition (Byrski, 1981, pp. 111–118).

The legacy of theatre and literature includes the practice of constructing characters modelled on heroes from epics and poems. This applies, inter alia, to the model of woman-mistress. In commercial Indian cinema (in this context mostly in the Hindi language), known as the *masala movie*, a woman is almost exclusively a sexual object (Tulshyan, 2014). She is perceived as

a sensual temptress, but remains a passive participant in interactions with a man – she lures with her beautiful body, clothes and jewellery, and with a sensual dance, allows herself to be looked at, but does not take the initiative. The man is described as the active side. In the past ten years, however, this cinema has undergone significant changes, assuming the role of middle cinema – between mainstream Hindi films such as *Bajirao Mastani* (Sanjay Leela Bhansali, 2015) or *Padmavaat* (Sanjay Leela Bhansali, 2018), and films from the parallel cinema movement, i.e. a trend in Indian cinema that was created in the state of West Bengal in the 1950s as an alternative to mainstream commercial cinema. The women issue in parallel cinema is represented by such iconic films directors as Satyajit Ray, Aparna Sen, Rituparno Ghosh, Buddhadeb Dasgupta, Kaushik Ganguly and Kaushik Mukherjee (aka “Q”). Although the social position of women and issues of gender-based violence had been the subject of sustained public debate and scholarly reflection in India for several decades, the brutal gang rape and subsequent death of Jyoti Singh in Delhi in 2012 constituted a critical turning point. This tragic event not only catalysed unprecedented public outrage and mass mobilisation but also generated a renewed cultural and cinematic engagement with the problem of violence against women. The recent wave of films addressing gender-based violence and women’s vulnerability can thus be understood, to a significant extent, as a response to the Jyoti Singh tragedy, which brought these issues into sharp national and international focus. Even stars such as Shah Rukh Khan admitted then that commercial cinema has a big problem with gender equality (Thakkar, 2013).

Western viewers often accuse Indian commercial cinematography of being excessively unreal. This detachment from reality, however, can be interpreted as an inheritance from Sanskrit drama. According to the Kashmiri 11<sup>th</sup> century philosopher Abhinavagupta’s theory of generalisation (*Sanskrit: adharanikarana*), one of the conditions for obtaining drama is to make a work of art universal and general (Byrski, 1981, pp. 111–118). A theatrical performance cannot be interpreted as an imitation of the real world, as art creates its own world. What the viewer sees on the stage (or screen) has nothing to do with his own emotions and life experiences. Thanks to this, both the viewer and the actor can enjoy the action of the performance (film) without relating it to their own lives. It is a safe way of experiencing emotions, in opposition to the Greek concept of *catharsis*, which assumed purification through in-depth, emotional “immersion” in the performance. Moreover, a significant part of the performances was created in court circles and was intended for audiences from higher social classes. Thus, among the heroes, apart from deities and other supernatural beings, representatives of the aristocracy dominated. *Masala*

cinematography – a genre of Indian films that combine various elements such as action, comedy, romance, drama, and music, often in a single narrative – has inherited this type of hero, even though its audience has changed. The world presented in Indian productions has nothing to do with the life of an average inhabitant of the subcontinent. Increasing numbers of contemporary popular film makers, like Alankrita Shrivastava, Sanjay Chhel and Pan Nalin, deal more vividly and boldly with social problems in India. Following the example of artistic Bengali cinema, this trend in Indian popular cinema uses new means of artistic expression, and increasingly deviates from its musical character, which had made it one of the most recognisable Asian cinematographies in the world. Movies such as *NH 10* (2015), *Mary Kom* (2014), *Mardaani* (2014), *The Dirty Picture* (2011), *Lipstick Under My Burkha* (2017), *Angry Indian Goddesses* (2015) or *Who Killed Jessica?* (2011) show strong, independent women who find themselves perfectly in the world of men and are able to fight for themselves and other women. As Anupama Chopra notes in *The Times of India* online edition:

Actresses have spent over 100 years as second-class citizens in Indian cinema. They have provided visual relief, pleasure and plot points that enables the hero to display heroism – count down all the damsels in distress, the sisters who were raped, the mothers who were trampled by tyranny until their sons rescued or revenged them (Chopra, 2015).

One evidence of change is the 2011 film *Dirty Picture*, inspired by the life of Silky Smithy, a South Indian actress known for her erotic roles and considered as a sex symbol. Directed by Milan Luthria, the film tells the story of a woman determined to pursue her life dream and strong enough to succeed in a masculinised world. *Dirty Picture* in a way opened the way to other images, in which strong, independent protagonists came to the fore. They include, among others, *Kahaani* from 2012 - the story of a woman taking revenge for her husband's death, *Mardaani* from 2014, in which Rani Mukherjee plays the role of a tough policewoman chasing traffickers, *Mary Kom* from the same year, which is the story of a famous Indian boxer, or such films as *English Vinglish* (2012) and *Queen* (2013), showing the process of women's emancipation from male partners. This kind of cinema plays an important role, among other media, in the public discourse on the situation of women. Indian cinema, accused so many times of contributing to the widening scale of violence against women, was becoming an advocate of gender equality and women's rights.

The situation is completely different in the art cinema, the centres of which are traditionally the states of West Bengal and Kerala. As Sara Hamblin claims:

The term *art cinema* is typically used to denote feature-length narratives structured according to a specific set of aesthetic codes that position them in opposition to mainstream films (...) It is used to signify films—usually made outside the major studios—in which the personal artistic vision of the director takes precedence over narrative intelligibility and marketability (Hamblin, 2018, p. 65).

Indian art cinema, otherwise known as *parallel cinema* and created by two film centres in West Bengal and Kerala, has always been eager to take up topics that are social taboos, such as class inequalities (*Ek Din Protidin*, *Kharji*, *Neem Annapurna*), homosexual relations (*Memories in March*, *Arekti Premer Golpo*), or the position of women in society (*Antarmahal*, *Paroma*, *The Lonely Wife*, *Tasher Desh*). Bengali film directors are sensitive to women's problems and at the same time are brave artists not afraid of facing social taboos, such as female sexuality, mother-daughter relations or sexual violence against women.

*Unishe April (1994)*, Ghosh's first feature film, already showed his extraordinary sensitivity to women's problems and understanding of the female psyche. The loneliness of women, resulting from the pressures of patriarchal Indian culture and their sense of social alienation, became one of the main themes in the director's work. A woman, seen through Ghosh's eyes, is an eternally lonely being, regardless of her social, educational, and marital status. Even surrounded by a loving family, she is unable to shed this feeling. The loneliness of the female protagonists is emphasized in Ghosh's films by the scenery and cinematography. The action of nearly all of them takes place in closed rooms, often dark, overloaded with furniture and knick-knacks, creating a stuffy, overwhelming atmosphere. The low-key technique, with black dominating the screen, additionally emphasizes the drama of the protagonists. The director described his films not as feminist, but "women-centric" (Bakshi, 2013) and claimed that his passion is for dealing with the things he knows best. One can argue that his work understands female emotions and desires perfectly.

Rituparno Ghosh's depiction of women can be understood as both a continuation of and a critical dialogue with the ways in which the older directors of Bengali parallel cinema – Satyajit Ray, Mrinal Sen, and Ritwik Ghatak – conceptualised female subjectivity. Their movies established a powerful cinematic language for representing women caught between tradition, social constraint, and emerging forms of autonomy, a language that Ghosh both inherits and transforms. A detailed comparative analysis of these intertextual and intergenerational dialogues – although highly illuminating for understanding the genealogy of Ghosh's aesthetic and ideological project – lies beyond the scope of the present paper and must therefore be reserved for a separate, more focused study.

## Woman as Body

In 2005, Rituparno Ghosh shocked Indian society, especially the inhabitants of his native city of Calcutta. The director was accused of spreading pornography due to the extremely bold, by Indian standards, erotic scenes in the movie *Antarmahal* (Rediff, 2005). Indian cinema is subject to strict moral censorship - it cannot show love scenes, even kisses are not very welcome. In this movie Ghosh told the story of two wives of a wealthy landlord Bhubaneswar, a man who has only two goals in life: to beget a son and to please the British (the film takes place in 1878). In both cases he has to resort to divine help and the bodies of his women. To achieve the second goal, he uses the upcoming festival in honor of *Durga* (one of the most popular Hindu goddesses, form of the Mother Goddess worshiped especially in Bengal); he hires a poor sculptor to create a statue of a goddess with the face of Queen Victoria. The first goal Bhubaneswar has been trying to achieve through 12 years of marriage with the beautiful Mahamaya. When he realises that his wife will not give him the desired heir, he decides to marry another woman – Jashomati, much younger than himself.

In her marriage with Bhubaneswar, Jashomati is reduced to a body. She is reduced to a womb that is to give birth to the desired heir, and the nightly attempts to bring him to conception are a real torment for her. In this respect, the image of woman as a body (often sexualised) merges with that of woman as mother. Bhubaneswar is a coarse and rough man who takes from his wife what is legally owed him, and does not heed her feelings and fears. Meanwhile, Jashomati suffers more and more and withdraws more and more into herself. Her only consolation is, paradoxically, Mahamaya. The first wife treats Jashomati roughly at times, but is not unfriendly to her. She also quickly realises that the girl is not a rival for her, and being a sensitive woman, she understands the anguish of the young wife. She herself was also, throughout the entire marriage, only a body that was to please a man and give birth to sons. Worse - a body that has failed, a body that the husband can use as he pleases, even to implement his political plans. Bhubaneswar agreed to give his wife to the local Hindu priests for one night in exchange for their support. Not without hesitation, however, resulting from the reluctance to share his property with others rather than worry about his wife's feelings. Rituparno Ghosh's view of the social situation of Indian, and especially Bengali, women fits in with the theory of symbolic clitoridectomy<sup>1</sup> developed by Gayatri Chakravorty Spivak. This term signifies the recognition of the female body as a complete

<sup>1</sup> The surgery, also called female circumcision, which involves the partial or complete removal of the clitoris, sometimes also the labia minora. This tradition operates mainly in African countries, including Sudan and Egypt.

male property, while depriving women of cultural competence. According to this theory, women cannot function in culture, express and realise themselves in certain spheres of social life solely because of their gender – in a patriarchal society they only function as reproducers (Spivak, 1990, p. 10).

To Zamindar's chagrin, the younger wife also failed to fulfill her husband's hopes; Bhubaneswar was thus forced to appeal to divine help. From then on, the young couple was accompanied in their bedroom by a Brahmin priest who recited sacred texts to increase the chances of conceiving a child. For Jashomati, the presence of a stranger during such extremely intimate moments was the ultimate humiliation. She was too shy to actively oppose her husband, but Mahamaya seized the opportunity. One night she slipped into her husband's bedroom and, sitting down opposite the priest, slowly began to remove her clothes from her body. Mahamaya was playing with the sari, skillfully revealing successive parts of the body and bringing the priest out of concentration. This is a key scene for the entire film: reduced to the body, a woman uses her beauty to take revenge on men:

The central point of interest here is Mahamaya's sexual use of her body and sari to challenge male power and dominance. Just as Binodini and Urmila do a type of bodywork in negotiating social values, Mahamaya strategically uses her body and sari in a sexualised manner that ridicules and undermines the domination and exploitation of Jasomati by Bhubaneswar (...) Bhubaneswar and the priest symbolise patriarchal society and religion and Mahamaya's body, in an ironic move, is transformed into a site of resistance in which she uses the very medium that women are subjugated by, her body, and arguably her sari, the traditional symbol of chastity and virtue, to confront and criticise rigid dominant moral values of society (Macdonald, 2009, p. 16).

This scene is important also for another reason: it shows that a woman, like a man, is endowed with sexual needs, which in patriarchal society are kept under the control of men. Quite boldly and frequently, by Indian standards, Bhubaneswar's show of intercourse with his young wife caused indignation in the Indian public. The director himself expressed his amazement at the fact that Indians are incapable of accepting sexuality as a permanent element of their lives:

Antarmahal spoke of times as they were in 19<sup>th</sup> century Bengal. The period witnessed the sexual exploitation of women and my job was to recreate that (...) The wife is used and abused every night by her mindless husband. Through the oft-repeated 'intimate' scenes, my intent was not to focus on the sex, but on the way the woman in question was exploited

by her husband. It's a pity that people are equating Antarmahal with cheap exhibitionism (Roy Mitra, 2005).

Jashomati and Mahamaya lived in luxury, they did not lack great costumes and beautiful furniture, but in fact they resembled favourite toys, not wives. They were reduced to the body, deprived of the right to feel shame, sadness and, above all, dignity.

## Object or Subject?

The wife in Indian tradition is not one of marriage's constituent entities – she has been relegated to a subordinate role, connected with giving birth to children and taking care of the house. She is not perceived as a subject, but only through the prism of her social function. Women's subordinated status threads its way through the dominant Indian Hindu-Sanskritic tradition. We can find it in many normative texts (for example *Manusmriti*<sup>2</sup>) and religious narrations (Sanskrit epics and Puranas). Even if the husband is a wicked man, the wife is to be faithfully by his side. As the mythological author of legal and normative texts, *Manusmriti* states, that “a woman must never seek to live independently” (Olivelle, 2005, p. 146). Even if their marriage is based on a lie, as is the case with Neeru, the heroine of the 2003 film *Raincoat*. Neeru gave up her youthful love in order to marry a rich man chosen by her family. However, Neeru's husband turned out to be a failure, a thief and a liar. Indebted, penniless, and always absent from home, he leaves his wife to face numerous creditors alone. Neeru fights not only with them, but with the whole world, pretending to be the woman she has never become – rich, pampered by her husband. She is unable to tell the truth even to her former lover, Manoj – the man she still loves. Lonely, abandoned by everyone, she spends her days in a cluttered, dark house. Her behavior towards Manoj, after many years of separation, oscillates between a cynical and calculated lie and a melancholy flirtation. Neeru is a combination of the withdrawn and virtuous housewife with the passionate girl she once was. Most of the scenes of the film for *Raincoat* were shot in one room, and the claustrophobic crampedness of four walls, so characteristic of Rituparno Ghosh's films, and the ever-falling rain emphasises her loneliness and sadness. As Richard Allen points out, *Raincoat* is a film that, “intricately anatomises a condition of unrealised desire that is created by the social expectations and constraints of arranged marriage, yet a desire that still exists at a level of ‘open secrecy’, at once acknowledged and disavowed. *Raincoat* evoke the metaphor of the ‘closet’ to characterise

<sup>2</sup> *Manusmriti* is an ancient Hindu legal text (c. 200 BCE–200 CE) attributed to the sage Manu, outlining social, moral, and legal codes that influenced traditional Hindu law and caste hierarchy.

the mortifying ways in which desire is confined and denied within arranged marriages” (Allen, 2015, p. 477). Neeru’s imprisonment was created with her own expectations of wealth and happiness, derived from the cultural norms, which determine her desires, and at the same time fears related to social status. The woman is poor and she is afraid of poverty. Moreover, she is not able to live on her own money in any other way. She must therefore agree to an arranged marriage. *Raincoat* is one of Ghosh’s most poetic films of – made in a subtle, a little blurred by light colouring, using the play of light and shadow to emphasize the melancholy and bitter sorrow of the characters.

As Wimal Dissanayake notes, Ghosh was primarily driven by the issue of seeking freedom and the anxiety over its lack in the lives of Indian women (Dissanayake, 2017, p. 52). Freedom, understood as financial independence, is provided by education and professional work. But in modern India the percentage of economically active women still remains relatively low – what is more, in recent years this percentage has decreased dramatically (Deshpande, 2021). Ghosh saw this problem and was eager to talk about it through his films.

*Dahan*, which was released in Indian cinemas in 1997, tells the story of Romita, a girl who was harassed by a group of bandits in front of passersby. Of the many witnesses to the incident, only a young teacher named Jhinuk has the courage to help the victim of the assault. Jhinuk also wants to convict five of her attackers, but her media campaign for justice is having quite different results. Jhinuk has to face the indifference and even aversion of Indian society to the situation and rights of women. She and Romita are intimidated and humiliated while the criminals go free. In his third film, Ghosh not only continued the themes related to the situation of Indian women, but also - following the example of his great predecessors Mrinal Sen or Satyajit Ray, drew attention to the problems faced by contemporary India, including corruption and abuse of power by the police and politicians.

Deepti, the heroine of the 2010 film *Abohomaan*, sacrificed her professional career for the benefit of her family. She devoted herself to her husband Aniket – a recognised film director, and their only son. The couple met on the set of a film directed by Aniket, in which Deepti was to play the lead role. The project was not implemented, Aniket returned to it only years later, thus turning his family’s life upside down. The main role is to be played by Shikha, an aspiring actress who resembles Deepti from her youth. Aniket was fascinated with Shikha’s beauty from the beginning, it didn’t take long for the couple to start an affair. Aniket’s romance ruined his marriage and his relationship with his son, who sided with his betrayed mother. *Is it not possible for both of you to coexist in my life?* – the director asks his wife, as if not realising how much torment it causes to her. Trapped in a love for her husband on the one hand

and a sense of hurt on the other, Deepti lives in the shadow of the woman she has taken under her wing and prepared for the role. But it is Deepti, not Aniket, who calls Shikha when she tries to kill herself. Ghosh thus seems to draw attention once again to a kind of female solidarity. Like Mahamaya in *Antarmahal*, Deepti apparently realises that her rival, too, is actually Aniket's victim. Once again, Ghosh also points to the extraordinary situation of women: even when established actresses, stars of the stage, they are in fact only toys in the hands of men.

The irony inherent in a man's attempt to educate a woman is to make her serve him better. Apparently, the woman who is liberated is actually all the more subjugated by patriarchy. This is what I wanted to bring out in juxtaposing the tales of a nineteenth century female actor and an actor of our contemporary times. Nothing has really changed – explained the director (Bakshi, 2013).

He did not explain, however, how the scene of Aniket's death should be understood. Dying director calls Sreemoti to him – does this mean that despite his affair with Shikha, his wife was his only love? Or, more likely, was Sreemoti an imaginary ideal woman that Aniket loved more than a real wife and mistress?

### **Demythologisation of Motherhood - Woman as Mother**

*May you be the mother of a thousand sons* (Bhattacharji, 1990, p. 50) – one of the most common wishes to Indian brides. Traditional wishes are not related to love or having an appropriate partner. Based on mainstream Indian tradition, real happiness for a woman is provided by a child. And preferably a son. Motherhood is a woman's only vocation and a guarantee of her social position – since antiquity, a standard blessing for a bride was the wish that her arms would never be empty, that she would always hold her son in them (Bhattacharji 1990). However, as Sukumari Bhattacharji notes in her research on motherhood in ancient India, being a mother did not necessarily bring emotional security to a woman: “She was a mere child-bearing machine who could be discarded with impunity as soon as she failed in her primary reproductive function. Motherhood thus was fraught with suspense, tension, insecurity and physical and mental pain.” (Bhattacharji, 1990, p. 50). The researcher adds that the only compensation for this state was the birth of a son. The male heir was not only a confirmation of a woman's social usefulness, but also a guarantee of livelihood in the future, in the case of her husband's death. The apotheosis of motherhood, after ancient treatises, apparently took over the cinema. The image of the mother shown by Indian cinema is an idealised

image of a life giver who deserves respect. She is selfless, protective, devoted to her children and prone to sacrifices. She is a moral compass to all members of her family. We can see this kind of mother in *Kabhi Khushi Kabhie Gham, Maa, Deewaar, Karan Arjun*. As Rosie Thomas notes, in Indian cinema, the biological mother is hardly ever a negative character:

Mother is a fount of nurturing beneficence and a vulnerable innocent, a protector, of her boy child and in a need of protection from him (she often appears slightly crippled or blind). She blesses him with her prayers, feeds him homely food, and sometimes mediates between him and his father, and she serves as the focus that keeps the family and home together (Thomas, 1996, p. 167).

The mother is therefore, according to most of Indian filmmakers, something like an icon, not a living being. She is completely devoid of sexuality, as if she sheds femininity with the birth of a child, becoming only the guardian of the hearth and not a flesh and blood woman. Ghosh breaks social taboos in this case. His films show a completely different picture of motherhood: more complex, full of contradictory emotions, and thus definitely more human. Some recent mainstream Indian films also provide nuanced representation of this concept. Films like *Tribhanga* (2021), *Mom* (2017), *English Vinglish* (2012), *Secret Superstar* (2017), *Nil Battey Sannata* (2015) show mothers stepping out of the traditional seen roles.

*Unishe April* (1994), inspired by Bergman's *Autumn Sonata* (1978), shows how much the relationship between a mother and her daughter can affect the life of the latter. The film's protagonists are two women: a mother and a daughter. Sarojini is a famous dancer appreciated by critics and audiences who, at least in the eyes of her daughter Aditi, puts her professional career ahead of her family life. Aditi was a child when her beloved father died unexpectedly. The girl had to face the tragedy on her own, because her mother was at a performance at that time. The death of her father was a blow to eight-year-old Aditi and led to a secret conflict between mother and daughter. Aditi grew up with two feelings: adoration for her long-deceased father and resentment towards her mother. This grief was dictated, of course, by Sarojini's life choice. Sarojini never had much time for her daughter. She was busy with a brilliant dance career and placed the upbringing of Aditi on her father's shoulders. Dancing was Sarojini's passion and an important part of her life, but it was drawing her away from her family. The woman in fact admitted that marriage and motherhood had never been her vocation; however, she did not have enough courage to oppose traditional social norms. Ghosh turned the ideal of an Indian family, in which the mother takes care of the children and the father pursues his professional career, upside down. According to Sudhir Kakar, an Indian

psychoanalyst and writer, the Indian mother is completely subject to her child's wishes and demands, whether they are for feeding, washing, putting to sleep or keeping company. Moreover, she has the habit of extending this type of motherhood until the 'baby' is ready for independent life (Kakar, 1983, p. 71).

The mother in Ghosh's films does not cease to be a woman. On the contrary: she is still attractive, well-groomed and exudes subtle eroticism. Full of feminine charm, Sarojini is the opposite of a neglected daughter. One gets the impression that Sarojini's beauty and femininity overwhelm Aditi, that the girl wants to be as different as possible from her mother, becoming her opposite. This opposition could be realised in creating a loving and full family.

*Unishe April* is therefore not an accusation against overly ambitious women, but against Indian society. Ghosh implies that it is time to redefine the concept of motherhood and the social roles of women, as traditional norms no longer correspond to the realities of behaviour and of a society increasingly dominated by the middle class at the turn of the 20<sup>th</sup> and 21<sup>st</sup> centuries. Contemporary Indian society is much more influenced by the West, which is the result of globalisation. As Alison Macdonald points out:

Ghosh tries to demythologise the mother from her iconic social status by portraying motherhood as a complex and problematic role that women must negotiate along with their other identities. Yet he does this by opening up the domestic sphere and exposing the politics of the private by showing the intricate emotional workings of relationships between women as they struggle to find their identity and place within domestic roles of mothers and daughters (Macdonald, 2009, p. 12).

Ghosh continued the topic of mother-daughter relationship in *Titli* (2002). The title character is a teenager, in love with a man twice her age, the well-known actor Rohit Roy. The news that her mother has had an affair with Rohit years earlier becomes a milestone in Titli's maturation. The girl realises that her plans were in fact just the dreams of an infatuated teenager. More importantly, however, she discovers that Urmila is more than an ideal mother and wife. The fact that her mother in her youth could have had romantic feelings, Titli could probably understand and accept. The fact that Urmila can also be in love when she is mature is a huge surprise for the girl. Titli, of course, asks her mother if she has ever loved her husband, but she seems to have a completely different kind of love in mind than the one they both have for Rohit. Love for a husband is devotion, affection, and obedience rather than romantic gusts of heart. In relation to her husband, Urmila is a dignified, devoted wife, while with Rohit she shows the face of a romantic lover: with flowers in her hair she sings and recites poetry to her beloved.

Ghosh returned in *Titli* to the issue of the carnality of mothers. The key scene for the film is when Urmila slides off her nightgown, revealing her naked body. This scene symbolises Titli's discovery of her mother's own latent sexuality and the fact she did not bury her sensual desires after the birth of the baby. As Macdonald claims, "Ghosh strategically uses Urmila's 'body work' to unite sexual desire and motherhood which serves to demythologise the idealised chaste virginal body of the all giving mother, the body of 'Mother India', and its concomitant ideal values and norms." (Macdonald, 2009, p. 14).

Adapting to the demands of traditional society, Urmila gives up Rohit twice and lives in a marriage full of mutual respect, attachment and friendship, but not love. Sarojini, pursuing her dreams of a dancing career, gains fame and awards, while losing contact with her daughter and husband; she lives on the outskirts of her family, being more of an exotic guest than its member. The mother in Ghosh's films tends therefore to be a woman trapped in social expectations. Regardless of whether she decides to stay in it or tries to break free, it is always lonely.

### **Buried Femininity - Woman as Widow**

The situation of widows in India has changed quite significantly over the centuries, systematically pushing them to the margins of society, where they are today. A widow's remarriage is no longer socially condemned as it was a hundred years earlier, but it is still not popular – especially in the higher castes. To this day, in some parts of India widows are excluded from community life as cursed beings, burdened with the evil deeds of their previous lives, which caused their husbands to die (Kota, 2018, p. 43).

Already in his first film, *Unishe April*, he showed a widow who absolutely does not live up to social expectations. Sarojini not only does not give up her femininity, but even emphasizes it: with makeup, beautiful outfits, and behaviour. She is a happy and professionally fulfilled woman. The director himself claimed:

I had completely de-familiarized the image of the traditional widow in cinematic representations; Sarojini was always decked up, particular about her make-up and accessories (...) I believe, because Sarojini did not feel victimized as a widow, Aditi took away the sympathy of the audience... the so-called Bengali middle class audience. Had Sarojini played up her widowhood in the conventional way, the sympathy would have been equally divided (Bakshi, 2013).

In August 2003, *Chokher Bali*. *A Passion Play* premiere took place – this movie was directed by Ghosh and the screenplay was adapted from Rabindranath Tagore's novel. One hundred years earlier, with this work,

Rabindranath Tagore, the Indian Nobel Prize winner, not only initiated a new literary genre in India, the realist-psychological novel, but also challenged traditional social norms. Tagore, followed by Rituparno Ghosh, tells the story of Binodini, a young widow who, against tradition, tries to fight for her own happiness. An educated, intelligent and beautiful woman does not want to – figuratively – bury herself alive after only a year of marriage and, as Kaustav Bakshi emphasizes, questions the age-old assumptions about female sexuality that have been internalised by women (Bakshi, 2017, pp. 284–299). Binodini is a multidimensional figure – she wears white saris, resigns from jewellery, eats only modest meals. All these elements are prescribed by Hindu legal texts as parts of appropriate Hindu widow lifestyle. According to Baudhāyana Dharmasūtra,<sup>3</sup> the widow (in the case of intercourse with the brother of her deceased husband in order to give birth to a son) must spend twelve months on mortification, consisting mainly of giving up eating meat, honey, alcohol and salt. Even later *Vasiṣṭha Dharmasūtra*<sup>4</sup> shortened the widow’s “penance” to six, instead of twelve, months. The most famous treatise from the group of Dharmashastras, *Manusmṛiti*, imposes on widows almost complete asceticism. The widow had to wear only white saris, she was supposed to shave her hair to the bare skin, and was not allowed to decorate her body with jewellery, makeup or flowers. Manu even forbade the use of perfume. Moreover, he ordered sleeping only on bare ground and eating only two meals a day, in addition completely devoid of spices that could stimulate a widow’s libido.

Binodini seems to follow these regulations. However, under this facade there is a woman full of life and energy, including sexual energy, symbolised by long, loose hair. Binodini’s rebellious nature is already shown in the first scenes of the film: a newly widowed girl is visited by a nun, her former teacher. She hands Binodini her favourite English chocolates, not knowing or not remembering that these delicacies are forbidden for the Hindu widow. However, Binodini eats them greedily, quickly burning the packaging left over from the delicacy – her rush, surreptitiously checking whether she is actually alone in the room, and her face full of guilt and shame, revealing that although it already contains the seeds of rebellion, the woman does not let him fully flare up. Binodini increasingly reveals the rebellious side of her personality, as soon as her position in the home of Mahendra and his young wife Ashalata became established. She expresses her point of view on the duty of a Hindu widow in calm, intelligent discussions with Mahendra and his friend Behari, often highlighting the absence of logic in the restrictions imposed on widows. In one of the scenes, she draws attention

<sup>3</sup> *Baudhāyana Dharmasūtra* is an early Hindu text (c. 500–200 BCE) attributed to the sage Baudhāyana, containing rules on law, conduct, and ritual duties that form part of the *Dharmasūtra* tradition.

<sup>4</sup> *Vasiṣṭha Dharmasūtra* is another ancient Hindu legal text (c. 300–100 BCE).

to the dietary guidelines: in her opinion, prohibiting widows from eating fish is pointless, as fish are the basis of the diet of the people of Bengal. However, there comes a point when the young widow is unable to hide her emotions. When Ashalata is convinced that God does everything for the sake of the people, the widow explodes with anger, asking: “I was widowed a year after my wedding, is this supposed to be good for me?” Asalata has no answer to this question. The young wife understands, moreover, the despair of her friend and, in her innocent, slightly infantile way, tries to support her even at the cost of going against tradition. Noticing the extraordinary beauty of Binodini, she encourages her to put on her jewelry - she is delighted with the effect and tries to convince her friend to wear this type of ornament at home. However, Binodini explodes with anger and, screaming, asks the astonished Ashalata: “Why should I wear jewellery secretly? Is it a sin to wear jewellery?” In order to support her friend, Ashalata summons Mahendra and Behari to see how harmful it is to the young woman not to decorate the body. On the one hand, men are fascinated by the striking beauty of Binodini, but on the other hand, they are filled with the awareness of the inappropriateness of her actions. The young woman stands before them like a living challenge to fossilised social and religious norms: dressed in a coarse widow’s sari and at the same time ostentatiously adorned with jewellery – as Kaustav Bakshi and Rohit K. Dasgupta note: “By desiring and donning a forbidden object, in this case, gold jewellery, the widow as well as the queer men demand acknowledgement of their status and sexual desires which are either repressed by violence or are treated as non-existent.” (Dasgupta, Bakshi, 2018, p. 74).

The contrast between the plain clothes and the splendour of jewels blurs the clearly delineated line between the sterile state of widowhood and a marriage based on passion (Macdonald, 2009, p. 16). Mahendra and Behari loudly express their insecurity, which is met with an outburst of anger from the quiet, peaceful Ashalata. Mahendra’s wife screams a truth that they both realise but do not want or cannot accept: Binodini has nothing to do with life, so why not let her at least wear jewellery? Mahendra seems to see the life force of Binodini, unrestrained even by widow’s dictates and prohibitions – he himself affectionately describes it as “the Elixir of life”.

Ghosh also shows the rebellious nature of the young widow in a less obvious way, through the motif of redness that runs throughout the film (Bakshi, 2011) – in Indian culture redness is regarded as the colour of passion, and thus inextricably linked with the institution of marriage. On her wedding day the bride wears a red sari, her feet and hands are painted red with henna<sup>5</sup>.

<sup>5</sup> Henna is a plant-based dye created from the henna tree. It is used in cosmetics, hair dyes, and hair care products, and also as a dye for clothing. Temporary skin tattoos, made with henna, is a part of many religion celebrations in Hinduism.

All these elements symbolise love and fertility. The first step in the new home is taken by the young wife by dipping her bare foot in the red-coloured water. For Binodini, this colour is therefore forbidden - she can only wear a sari in a white colour symbolising the widow's state. Ghosh thus reversed the convention again: "The rebellion she puts up is symbolised by the repetitive use of the colour 'red'. 'Red' is not just the colour of passion; it's also the colour of revolt in 'Chokher Bali'" (Bakshi, 2013).

This colour, as a symbol of rebellion, appears four times in the film. First of all, Binodini's menstrual blood is red. Menstruation occurs suddenly as the widow is busy cutting vegetables with the other women, so viewers can see a blood trickling down the ground, which Binodini cannot hide. This scene, like no other in Ghosh's film, shows that – according to him – the widow is still a young, fertile, sexually desirable woman. She can still give life, but her fertility is going to be limited due to the strict moral code of India at that time. Nowadays, menstruation is still a subject of cultural taboo in India, so Rituparno Ghosh realized that by showing a menstruating woman on the screen, in addition a widow, he was breaking unwritten social norms (Bakshi, 2013). What's more, Binodini's monthly blood is mixed with streams of monsoon rain – considering the fact that in Indian culture rain is associated with love and sex, it reinforces the sexual and fertile symbolism of this scene. Already in *Rigveda*, rain was equated with fertility (Hopkins, 1916). In the aforementioned *kavya*, nature played an extremely important role, both as the background of events and an active factor influencing the experiences of the heroes. The rainy season was associated with domestic and sexual life, as field and farm work was suspended during the monsoons. Poets willingly described lovers meeting under dark storm clouds swollen with rain or in torrential downpours (Warder, 1990, p. 600). The sad gaze of Annapurna, Mahendra's aunt, also dressed in a white – characteristic for the widow – attire, shows that Binodini's situation arouses pity and understanding in other people.

In one of the scenes of the film, after having a sexual intercourse with Mahendra, Binodini smears her forehead with the vermilion from the sacrificial basket she has with her. The red vermilion that spread in a part of the bride's hair right after the marriage ceremony emphasized her status as a wife. In these scenes Binodini considers herself to be Mahendra's wife. At Mahendra's order to wipe his face, the woman hugs his arms and smears vermilion on his shirt – thus seemingly confirming her right to this man as a wife. Seeing the embarrassment in her lover's eyes, she states despairingly: "I only lived with a man for a year. He's just a ghost now, but I still bear his mark". The red color, like a clamp binding the plot, also appears in one of the final scenes of the film. Binodini, after breakup with Mahendra, demands a red scarf from him. The

man is surprised by the inappropriateness of this request, because a widow shouldn't wear clothes in the color reserved for wives. Binodini, however, dismisses his warning with an outburst of laughter.

Binodini often expresses her longing for life, which – in her opinion – she should live as a wife. With regret mixed with jealousy she watches as the servants paint Ashalata's feet with henna; the same feeling accompanies her when she decorates her friend's hair with jewellery, glancing at her own face, devoid of flowers, ornaments and makeup. In another scene, Binodini helps Ashalata wash the vermilion off her face after the Durgapuja<sup>6</sup> ceremony, from which she herself, as a widow, was removed. Binodini does not give the young widow water for a long time, watching her awkward attempts to remove the soap from her eyes with silent fury. As Srimati Mukherjee points out:

Here Ghosh has Asha occupy the center of the frame, while Binodini is positioned to her side. The scene has us focus on the easy mobility of Asha's fingers as she quickly soaps and rinses her face while Binodini's gestures are deliberately presented as slow and meditative, drawing the spectator's gaze towards her face and its expressions. It is also noteworthy that Asha's face is often covered in this scene while we are never allowed to lose sight of Binodini's. Thus even as the framing of the scene situates the privileged wife at the center, it is Binodini, one of the peripheral figures in the scene, who ultimately commands our attention through her expressions and temporary act of denial (Mukherjee, 2012).

Binodini's bitter jealousy also manifests itself in her interference in the sex life of Ashalata and Mahendra. The widow has a habit of observing the spouses in the bedroom with binoculars, as long as they forget to close the windows. In this way, Rituparno Ghosh inverts the convention dominating in mainstream Indian cinema, assuming that the man is the active side of the male-female relationship. The woman, on the other hand, is only a passive object of his observation and possible action. A similar point of view was adopted two years earlier by Bollywood director Mahesh Manjrekar in the film *Astitva* (2002). The heroine of this movie is neglected by her workaholic husband Aditi and falls in love with a music teacher, Malhara. In one of the scenes, she observes a man dancing in the pouring rain, succumbing to a long-lasting desire.<sup>7</sup> This

<sup>6</sup> Durgapuja, also known as Durgotsava, is major festival of Hinduism, particularly celebrated in Bengal and Assam. Durga Puja celebrates the victory of the goddess Durga over the demon king Mahishasura.

<sup>7</sup> Compare with the procedure used by Amitabh Chakraborty in *Cosmic Sex* (2012). In one of the scenes of this picture, a teenage girl named Sadhavi, sitting on a tree, observes boys bathing in the Ganga River.

is another example of rain related to sexuality and fertility. Ghosh probably referred to the famous scene from the cult film *Charulata. The Lonely Wife* (1964) by Satyajit Ray, in which the title character watches her husband through binoculars. Bhupati passes by his wife, but he is just as distant and inaccessible as the people watched by Charulata through the windows of her apartment. In these similar scenes, Satyajit Ray and Rituparno Ghosh emphasize the sexual and emotional needs of their characters, but Ghosh does it more bluntly, emphasizing the control that the Indian tradition takes over widow sexuality. It is not the only moment of the film in which the Bengali director decides to reverse the convention. In the picnic scene, he again shows Binodini staring at Behari's naked, athletically built body. It is worth noting that throughout the movie *Chokher Bali. And Passion Play* exhibits male nudity, while women bodies remain tightly covered with saris. As Kaustav Bakshi notes:

There are several shots in which the camera almost lovingly films the male body; in scenes of physical intimacy involving Mahendra and Ashalata or Binodini, it is Mahendra's body that is exposed rather than those of the female characters. The gaze of the spectator and that of the camera are fused in all these shots thereby transforming the male body as spectacle. In this sense, the film makes an attempt 'to reverse the relation between the female body and sexuality which is established and reestablished by the classical cinema's localisation of the woman's spectacle' (Bakshi, 2011, p. 3).

Banalata, a protagonist in the film *Bariwali* (2000), is the woman Binodini could become if Ghosh remained faithful to the novel's ending: mature, bitter, living a barren and lonely life in too large a household. Banalata, after the death of her fiancé, just before the wedding, voluntarily locked herself in a cultural cage prepared for her by Indian tradition. Believing that a woman could love only one man in her life, she devoted herself to a widow's existence in a large, neglected house, with only two servants: Maloti and Prashanna. Banalata practically does not leave the house, she has no entertainment, except for a TV series watched with the servant. Her bitterness and passivity are confronted with Maloti's joy, appetite for life and unfettered sexuality. The young maid knows what she wants from life and is not afraid to reach for it, does not run away from life as her mistress does. Banalata's dormant desires and emotions are only revealed under the influence of the director, Deepankar. He was working on a film based on the novel *Chokher Bali* by Rabindranth Tagore and was looking for a house where he could shoot. His friends recommended him Banalata's residence. The woman is so charmed by his superficiality and eloquence that she not only agrees to share her home with the film crew, but even to play a small role in the movie. Deepankar is aware of her romantic

feelings, but does nothing to dispel the woman's dreams. When the film crew leaves Banalata's house, the woman writes letters to the director, to which she does not get an answer. And when the long-awaited letter finally arrives, it is like a slap against her illusions. Deepankar informed her that the scene with her participation was cut out of the final version of the film. Banalata takes this as a betrayal by her lover and realises that for Deepankar she was just a useful tool.

Speaking about female sexuality Ghosh again turned to symbols (including, as in the movie *Chokher Bali*, red as the colour of passion and marriage). The house itself has a symbolic meaning – Banalata somehow gives it to Deepankar like her virginity. Her dreams also have a hidden and symbolic erotic dimension. As Rohit K. Dasgupta and Tanmayee Banerjee note:

The apparently incoherent shots of white pigeons on clean white linen, of Dipankar painting the wall red and paint splashing on the floor, or a sequence of Banalata holding a virgin book with a brown cover and Dipankar splitting open the uncut pages of the book with a screwdriver, followed by spots of red spurting onto the face of Banalata as pigeons prowl on the red paint splashed on the floor – all are carefully composed visual metaphors for the idea of the loss of virginity that is cherished by Banalata in her dreams (Dasgupta, Banerjee, 2016, p. 43).

Ghosh claimed that the film spoke of the selfishness of artists who often unconsciously exploit people, chasing after their artistic dreams (Chatterji, 2000). In his opinion, artists can be extremely cruel, and Banalata is just another victim of this cruelty. However, not only selfish, Deepankar also bears the guilt of woman's next disappointment. The guilt is deepened by the controlling the sexuality and emotionality of women – a mechanism present in mainstream Hindu culture in India. This process is symbolised by the bedspread, under which Banalata lies in a dream, and which Deepankar pulls from her. However, the woman herself is also to blame – Ghosh seems to say in his film that although the cage for Banalata was prepared by Indian tradition, she entered to it voluntarily. India is a country where the limitations of women's existence were introduced by men, but women are their most faithful guardians (Chatterji, 2000).

## **Conclusions**

In Bengal in the 21<sup>st</sup> century, as in many others parts of India, women still occupy a subordinate position in society. This applies to almost all spheres of life (including economic, political, educational and professional work). At the same time, however, gender-based violence is publicised and present in the media, which is linked to the fact that women's emancipation has become a subject of media and scientific discourse as well.

Ghosh's films are an artistic critic of a patriarchal social system based on male supremacy. His cinema emerges as a deeply humanistic and socially engaged body of work that exposes the contradictions within Bengali and broader Indian patriarchy. For violence against women, Ghosh blames men who see in a wife, sister or daughter only an obedient servant or a body to give sons. In Ghosh's films, this objectification of women is one of the causes of her permanent loneliness. The director is against social exclusion on the basis of gender, seeing a woman as a person completely equal to a man - a woman in his eyes is a gentle and subtle being, but she has an inner power and strength that do not require male protection. His films offer a sustained critique of the ways in which women are silenced, objectified, and spiritually isolated within cultural frameworks that outwardly glorify them as mothers, wives, or goddesses. Ghosh dismantles these idealised archetypes—derived from Sanskrit literature, Hindu law codes such as the Manusmṛiti and Dharmasūtras, and perpetuated through commercial cinema—by portraying women as multidimensional beings capable of moral ambiguity, desire, and rebellion.

Ultimately, the article demonstrates that Rituparno Ghosh's portrayal of the Bengali woman constitutes a powerful form of cultural critique and moral redefinition. His heroines, often described as “doomed to loneliness,” are not merely tragic figures or passive witnesses of social change. Rather, they emerge as complex subjects navigating a civilisation in transition – suspended between inherited orthodoxy and the desire for a modern, self-defined identity. While long positioned as silent observers and survivors of patriarchal structures, in Ghosh's cinema they increasingly acquire voice, agency, and ethical presence, actively negotiating their place within a transforming moral order. By rendering their interior worlds visible and audible, Ghosh not only restores women's humanity but also compels Indian society to confront its own unresolved moral contradictions and failures.

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**Review:** Jarosław Różański, *The Federal Republic of Ambazonia: In Search of an English-language Political and Cultural Identity for the People of Cameroon* [*Republika Federalna Ambazonii: Poszukiwanie tożsamości kulturowej i politycznej angielskojęzycznych mieszkańców Kamerunu*], Warsaw 2023: Wydawnictwo Naukowe UKSW, 259 pp.

The last decade has witnessed growing scholarly interest in «unresolved nation-state issues» in Africa, particularly secessionist movements, hybrid sovereignties, and postcolonial struggles for cultural recognition. In this context, Jarosław Różański's *Federal Republic of Ambazonia* represents one of the most comprehensive Polish-language monographs on the Anglophone crisis in Cameroon and the sociocultural processes underlying the imagined Ambazonia polity. The book is distinguished by its interdisciplinary approach, combining history, ethnography, missionary studies, and conflict analysis. Through this multi-layered perspective, Różański offers a nuanced account of how colonial legacies, cultural identities, and political resentments converged to create one of Africa's longest-running conflicts.

A key strength of the book is its insistence that Cameroon's Anglophone identity cannot be viewed solely through the lens of 20<sup>th</sup> century colonial partition or the federation of 1961. The introduction clearly states that the book will examine the Anglophone problem in Cameroon, the cultural and political identity of Anglophone communities, and the emergence of "Ambazonia" as a concept. This appears in the author's abstract and in Section 1.2: "Issues and content of this work," where the author frames the problem and scope. The book operates within a theoretical framework that posits identity as historically constructed, drawing on perspectives such as the work of Achille Mbembe (1996), Piet Konings, and Francis. B. Nyamnjoh (2003) on identity in Cameroon, and an African political anthropology that rejects static tribal models. The central theoretical premise is that Anglophone identity in Cameroon is the product of intersecting historical forces, not simply

a colonial administrative artifact. Róžański demonstrates that British and French colonialisms created divergent political cultures, linguistic and educational differences deepened this division, and colonial boundaries and models of governance laid the foundations for contemporary identity conflict. The book emphasizes the structural effects of colonial rule, although the author does not explicitly refer to postcolonial theorists. Instead, he demonstrates these dynamics through historical evidence. An analysis of Cameroon after 1972 (the unitarianism of Amhadou Ahidjo and later Paul Biya) suggests a hidden application of the core-periphery theory (Fogui, 1990; Wunsch, and Olowu 1990). Róžański shows how centralisation weakened federal guarantees, English-speaking regions were systematically marginalised, and linguistic and legal pluralism was suppressed by a unified state policy. This situates Ambazonian separatism within a broader African pattern of tensions related to postcolonial state-building. A significant observation is that separatist nationalism in Ambazonia is rooted not so much in ethnic homogeneity as in a shared cultural and linguistic experience, reinforced by missionary education, an English-language legal culture, Protestant institutional traditions, and a collective memory of marginalisation. This is consistent with theories of cultural nationalism, in which culture, not ethnicity, shapes political mobilisation. Furthermore, religion is viewed here as a sociopolitical actor. Drawing on church documents and missionary history, the author implicitly adopts a theory of religious institutions as mediators of identity and conflict, demonstrating the church's role in articulating grievances, shaping education and literacy, and providing a political framework for community mobilization.

In the very first chapter, the author returns to the region's deep history, describing the mosaic of pre-colonial societies, their economic systems, religious practices, and intergroup dynamics. This contextualization, rarely found in most English-language, policy-oriented analyses, serves two functions. First, it disrupts simplistic narratives that treat Anglophone identity as an artificial colonial construct. Second, it demonstrates that the region's cultural pluralism existed long before the emergence of European powers, creating a complex foundation on which later political identities were built. This longitudinal perspective is further developed in the chapters devoted to early European engagement in Amba Bay (1832–1887). Róžański reconstructs the interplay between British traders, Jamaican Baptist missionaries, and coastal communities, emphasizing the profound impact of missionary networks, literacy, and Christianization on the emerging cultural identity of the region's inhabitants. Particularly interesting is his analysis of the role of Jamaican missionaries in shaping a proto-Anglophone consciousness – a topic often overlooked in mainstream studies, which prioritize British administrative structures over religious and diasporic entities.

The author's historical chapters effectively demonstrate that the roots of the Anglophone – Francophone division lie not only in the German, British, and French colonial periods but also in precolonial social dynamics and early contacts with the Atlantic world. This allows the reader to appreciate Ambazonian identity as both historically grounded and constantly reinterpreted. The chapters on German rule (1887–1914), the interwar mandates, and the period of UN trusteeship after 1945 provide a meticulously documented account of the region's geopolitical transformations. Róžański utilizes an extensive bibliography – drawing on French, English, and German archival sources, as well as missionary documents – to describe how successive colonial regimes built competing administrative cultures and institutional infrastructures.

A detailed analysis of the 1961 plebiscite, the subsequent establishment of the Federal Republic of Cameroon, and the centralisation reforms under Presidents Ahidjo and Biya (1961–1982) constitutes one of the book's most important intellectual contributions. Róžański convincingly argues that the erosion of federal autonomy, the francophoneisation of education and law, and the absorption of Anglophone institutions into centralised state structures contributed to widespread political disillusionment. While these processes are familiar to readers of Piet Konings and Francis Nyamnjoh, Róžański's work complements the literature by citing less frequently discussed Polish missionary perspectives and observations, often unavailable in English-language discourse. His attention to the internal diversity of Anglophone political movements is particularly noteworthy. The author avoids homogenising “Anglophones” as a single bloc, instead mapping the rivalry between federalists, unionists, and separatists, as well as the divergent agendas of elites and grassroots initiatives. This is consistent with recent historiography, which emphasizes the complexity of regional political cultures rather than assuming ethnic or linguistic unity. The second part of the book describes the dramatic escalation of the Anglophone crisis in 2016 and 2017. Róžański reconstructs the sequence of protests, school boycotts, lawyers' strikes, rejection of dialogue initiatives, and the eventual proclamation of the Federal Republic of Ambazonia in October 2017. What distinguishes this account from journalistic or NGO reports is the author's careful portrayal of competing separatist leadership structures, including the Transitional Government, the Ambazonia Governing Council (AGC), and various armed groups such as the Ambazonia Defense Forces (ADF). Crucially, Róžański does not romanticise the separatist project. His analysis highlights the fragmentation, rivalry, and crises of legitimacy that plague Ambazonia's leadership. He documents how the imprisonment of Sisiku Ayuka Tabe and the subsequent power struggle with Samuel Sako weakened the movement's cohesion, while the growth of militia groups intensified cycles of violence,

retaliation, and civilian suffering. The description of the violence (attacks on schools, the destruction of villages, sexual assaults on women, kidnappings, and intimidation of religious communities) is detailed yet balanced. Drawing on reports from the Catholic Church, foreign missions, and humanitarian organizations, Róžański paints a grim picture of social disintegration and widespread human rights violations.

Perhaps the most conceptually engaging section of the monograph is Róžański's reflection on Ambazonia as a project of cultural memory and political imagination. In a particularly insightful passage, the author argues that while no "Ambazonian people" have ever existed as a self-identifying ethnocultural group, the contemporary movement deliberately constructs an identity by drawing on scattered elements of historical memory – such as the encounters at Ambas Bay in the 19<sup>th</sup> century and the short-lived federation of 1961–1972. This draws on Benedict Anderson's theory of "imagined communities" but grounds in the specificity of Cameroon's multilingual and multiethnic landscape. Róžański's approach avoids the pitfalls of both nationalist romanticism and dismissive realism. The author neither endorses Ambazonian separatism nor reduces it to a purely manipulative, political fabrication. Rather, it treats it as an emerging identity with socio-cultural roots – shaped by memories of colonialism, grievances over marginalization, and aspirations for recognition.

*The Federal Republic of Ambazonia* represents the most comprehensive Polish-language study of Ambazonia to date, filling a gap in Central European scholarship on this conflict. By positioning Róžański with Harry Akoh's recently published volume (2024), we see how descriptive historical reconstruction (Róžański) and normative/theoretical pluralism (Akoh) can usefully interact: the former provides chronology and sources; the latter expands the diasporic, ethical, and transnational dimensions that are increasingly important for understanding Ambazonia's future. The emphasis on cultural and religious dimensions expands the English-language political science literature, reminding readers of the centrality of missionary history and interreligious dynamics in shaping contemporary identities. The historical narrative of Anglophone identity challenges reductionist narratives, encouraging comparative reflection with other African separatist movements such as South Sudan, Somaliland, and Biafra. The included map of separatist factions contributes to understanding how digital diasporas, exile politics, and factionalisation shape contemporary uprisings. The documentation of violence against civilians constitutes a crucial human rights record and underscores the urgent need to address what has become one of the most neglected humanitarian crises in Africa.

Despite its many strengths, the monograph leaves some areas open for further exploration: the internal complexities of Anglophone socioeconomic stratification (urban/rural divides, elite formation, gender dynamics) receive limited attention. The role of digital media in shaping Ambazonian identity could be explored more broadly, given the movement's reliance on online mobilization. The book references several historical periods, including the precolonial era, German colonisation, British/French mandates, the post-1961 reunification period the protests and conflict of 2016/2017. But the introduction does not formulate a single, explicit time frame of analysis; rather, the periodisation becomes clear through the chapter outline. The introduction does not list formal research questions. However, it implicitly raises guiding questions, such as: Why did the Anglophone conflict emerge? How did Anglophone identity develop historically? These are implied rather than formulated as academic research questions. The author refers to Erik Erikson's works on self-identity and the stages of identity distinguished by him, but he is not included in the bibliography.

Jarosław Róžański's book, *The Federal Republic of Ambazonia*, is a significant contribution to the study of African cultural and political identities. Combining deep historical context, ethnographic sensitivity, and insightful political analysis, it offers a comprehensive account of how English-speaking Cameroon became the site of a powerful and tragic struggle for recognition, memory, and sovereignty. For scholars of culture and society, particularly those interested in postcolonial statehood, identity construction, and conflict transformation, this book provides both an invaluable resource and a compelling interpretive framework. This work deserves the attention of readers beyond Polish African studies circles and should be seen as a Polish contribution to interdisciplinary research on contemporary African crises.

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**Maria Grajcar Istvanova** serves as a postdoctoral researcher at the Institute of Oriental Studies of the Slovak Academy of Sciences and lectures as an assistant professor at Masaryk University, Brno. She earned her PhD. from the Department of East Asian Studies, Comenius University Bratislava. She is a member of European Association of Chinese Linguistics, European Association of Chinese Studies, and Czech Association for Language and Cognition. Her major research interests include Chinese linguistics, corpus linguistics, and media discourse analysis. Her current research project is aimed at the study of the Belt and Road Initiative's image in the Slovak media.

**Agata Maria Karbowska** is an Assistant Professor at the Jagiellonian University in Kraków; Ph.D. degree in political science. She completed training at the African Studies Centre Leiden, gave open lectures at Trinity College in Dublin and the University of Iceland in Reykjavik about Sino-African Relations. She is the author of articles on the Middle East and Africa. Her research interests revolve around Islam, especially Sufism and political Islam, and the history, culture, society, economy and politics the broadly understood Middle East and Africa.

**Abdulrahman Al-Salimi** (‘**Abd ar-Raḥmān as-Sālīmī**) is an Omani scholar specialising in early Islamic theology, Ibādī studies, Qur’ānic hermeneutics, and Islamic legal history, with a particular focus on the Arabian Peninsula and the Indian Ocean world. He is a board member of the German University of Technology in the Sultanate of Oman. He has held fellowships at leading international institutions and has published extensively with major academic presses, including Brill, Edinburgh University Press, De Gruyter, and Otto Harrassowitz. His research combines manuscript studies, intellectual history, and critical editions of early Islamic texts.

**Hoàng Phương Thảo**, Ph.D., is a lecturer at Hanoi National University of Education, Vietnam. Her research focuses on the sociology of religion, church-state relations, and the impact of digital transformation on religious practices and governance in post-socialist contexts. She has published on Buddhism in Vietnam, and broader issues of culture and governance in Asia. She is a member of the Vietnam Association of Religious Studies.

***Selected publications:***

Hoang Phuong Thao. 2018. 'Buddhism and State Management in Vietnam after Đổi Mới'. *Journal of Religious Studies*, 4, pp. 45–62.

Hoang Phuong Thao. 2020. *Religion in the Digital Age: Vietnamese Perspectives* [in Vietnamese]. Hanoi: Hanoi National University Press.

Hoang Phuong Thao. 2022. 'Digital Religion and State Governance in Vietnam'. *Asian Journal of Social Sciences*, 50 (2), pp. 178–196.

Hoang Phuong Thao. 2024. 'Religion and Policy of Catholic Prohibition under the Nguyen Dynasty: Analysis of Ritualistic Considerations'. *Vostok (Oriens)*, 1, pp. 91–102. DOI: 10.31857/S086919080027037-7.

Hoang Phuong Thao. 2024. 'Insights from Khiêm Cung Ký: King Tu Duc's epitaph and its relevance to the second half of 19th century Vietnam'. *Vostok (Oriens)*, 5, pp. 166–176. DOI: 10.31696/S086919080028896-2.

**Mahnaz Zahirinejad** is an Assistant Professor at the Institute of Mediterranean and Oriental Cultures, Polish Academy of Sciences. Her research focuses on the socio-cultural and political-economic development of Middle Eastern countries. She pays special attention to the study of the Iranian middle class, examining its socio-cultural and political-economic characteristics and its interactions with the state. She has published books and peer-reviewed articles on these topics.

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Manuscript length should be between 30,000 and 40,000 characters (including the main text, footnotes, reference section and spaces), in 12-point Times New Roman font, with ample margins on all sides.

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The main body of text can be divided into paragraphs/subchapters and its names should be written in bold and centred, with 1 blank line space between different subchapters and its names. Including the “Conclusions” section is also recommended.

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Example:

There is still a labelling issue when it comes to flavourings in food. It is noted that, “flavours such as vanillin which occur naturally in food are called ‘nature–identical.’ The label does not have to state where it comes from.” (Wilson, 2009, p. 257).

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Other aspects of *sharī'a*, such as those dealing with the rights of religious minorities, women’s rights, and human rights in general, also need to be revised and reconsidered. Contextualisation of the Qur’ānic stipulation and examination of its linguistic and stylistic structure – as discourse – would reveal that the jurists’ work was basically to unfold the meaning of such stipulation and to re-encode this meaning in various social contexts (Abū Zayd, 2006, p. 95).

When works of two or three authors are cited, please follow the rule: (Ejiga, Igwe and Kashim, 2015).

In case of four or more authors: (Johnson *et al.*, 2001, p. 226).

Paraphrasing is strongly recommended.

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**REFERENCE SECTION** (a modified Harvard system): it has to be a separate part after the text, DOI is necessary in the case of journals.

- **Books**

Abaza, Mona. 2020. *Cairo Collages. Everyday Life Practices After the Event*. Manchester: Manchester University Press.

- **Book chapters**

Abu-‘Uksa, Wael. 2015. ‘Liberal Renewal of the Turath: Constructing the Egyptian Past in Sayyid al-Qimni’s Works’, in: Hatina, Meir and Schumann, Christoph (eds.) *Arab Liberal Thought after 1967. Old Dilemmas, New Perceptions*. New York–Basingstoke: Palgrave Macmillan, pp. 101–117.

- **Edited volumes**

Burkhalter, Thomas; Dickinson, Kay and Harbert, Benjamin J. (eds.). 2013. *The Arab Avant-Garde. Music, Politics, Modernity*. Middletown, Connecticut: Wesleyan University Press.

- **Theses and dissertations**

Rahman, Yusuf. 2001. ‘The Hermeneutical Theory of Naṣr Ḥāmid Abū Zayd. An Analytical Study of His Method of Interpreting the Qur’ān’. Ph.D. thesis, McGill University, Montreal, Canada.

- **Journal Article (Print)**

Najjar, Fauzi M. 2000. ‘Islamic Fundamentalism and the Intellectuals: The Case of Naṣr Ḥāmid Abū Zayd’. *British Journal of Middle Eastern Studies*, 27(2), pp. 177–200.

- **Journal Article (with a DOI)**

Abdul-Rahman, Rostam. 2017. ‘Demythologizing the Qur’an. Rethinking Revelation Through Naskh al-Qur’an’. *Global Journal. Al-Thaqafah*, 7(2), pp. 51–78. DOI:<https://doi.org/10.7187/GJAT122017-2>

- **Article in newspapers**

Borger, Julian. 2002. ‘US soldiers die in Afghan battle’. *The Guardian*, London, 5 March 2002: 1.

- **Electronic article on a thematic website**

Gana, Nour. 2011. ‘Rap Rage Revolt’. *Jadaliyya*, available at: <http://www.jadaliyya.com/pages/index/2320/rap-rage-revolt> (Accessed: 11 January 2022).

- **Web pages and Websites**

Al-Daif, Rashid. 2021. *Rashid al-Daif’s Biography*. Available at: <http://www.rachideldaif.com/biography/> (Accessed: 1 January 2022).

- **Non-English Sources (translations of the titles in brackets)**

Lipczak, Aleksandra. 2020. *Lajla znaczy noc* [Layla Means Night]. Kraków: “Karakter”.

- **Translations of non-English Sources**

Tokarczuk, Olga. 2021. *The Books of Jacob*. Translated by Jennifer Croft, London: Fitzcarraldo Editions.

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